



Orthotic Patient Administration System

Manual

V6

wynnlodge limited

5 The Willows, Strensall, York YO32 5YG

Tel: 01904 492425 Fax: 01904 492772
e-mail: opas@wynnlodge.co.uk

OPAS

Orthotic Patient Administration System

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Introduction

1. The Manual

This manual is intended for two purposes: to help you learn the system during the first exciting weeks of familiarisation with OPAS and to act as a reference guide to answer specific questions.

You should read the first part of the manual, *Moving around OPAS*, before diving into the rest of the manual.

The next part then gives detail on the facilities within OPAS roughly in the order in which you are likely to use them. It can be used as a training manual by working through it sequentially. You should, however, be receiving adequate training, and the manual is designed to be a reminder on how to do those tasks not performed regularly or as a refresher guide after training. Note that some menu items do not show for all users: some only show if you log in as an administrator. If you need to access a screen that does not show for your login, refer to your administrator within the Orthotics Department.

Finally, a comprehensive index is then provided, referring you to the main part of the manual: this will serve as the first port of call for questions and problems.

2. Conventions

- Options to be selected from the main menu are shown like this.
- Options to be selected from the top of the screens or in pop up boxes are shown like this.
- *Field names are shown like this.*
- Keys, which are to be pressed, are shown like this: **Enter**
Thus you would press the **Enter** key, not type the word Enter.
- Key-presses shown like this: **Ctrl-Enter** indicate that the first key is held down, then the second key is pressed briefly, then the first key is released.
- clicking with the mouse is always the left mouse button unless otherwise stated.

3. Training

An installation & familiarisation session, followed by at least two training days, is included in the price of the purchased system.

The training sessions can be taken at any time. When you feel ready for more training, please phone Linda Pawson on 01904 492425 to arrange a convenient date.

The training sessions assume that you are familiar with the computer keyboard and the mouse: they are not intended to be Windows training sessions. If necessary, it may be appropriate for your staff to take a standard Windows training course before being trained specifically on OPAS. If you prefer, we will be happy to give standard Windows training to your staff before starting the OPAS training (and if your staff prove to be unfamiliar with standard Windows concepts and operation, this will be essential), but there will be a charge as this is not included.

The familiarisation session will look at adding new patients and orders into OPAS. In the first training session, we will check the reference data and ensure that you know where it is and what it is used for, and then recap on entering & updating patients and orders.

We will then cover the following topics as required. The order in which they are covered will depend on your particular requirements.

- **Appointments**

- Setting up clinic details
- Creating clinic dates
- Making and updating appointments

- **Stock Control**

- Setting up stock items
- Ordering stock
- Maintaining stock levels

- **NSI (Non-Scheduled Items)**

- Setting up any suppliers and/or items which are not included on the NHS OPRICE list

- **Reports**

- Looking at the different ways in which OPAS can produce written reports

If after the two training sessions you are still unsure and need further training, please contact Wynnlogde to discuss further training requirements. We recommend training to be taken in half-day sessions, since more is often too much to take on board in one day.

4. Support hotline

01904 492425

If you have a problem which cannot be solved by this manual, please phone us for help on 01904 492425. Please start by giving your name and the **hospital** you are calling from.

You must be at the keyboard when you phone, since we will probably ask you to type things and tell us what happens.

Please note that we are happy to provide support for the OPAS software, but not for your hardware or other software, e.g. network or backup problems. If the problem is related to a hardware fault or a network problem, then since we are responsible only for the OPAS software, we will refer you to your technical support personnel.

To save time, before you phone us, please try the following:

- messages and prompts appear throughout the system and if you are unsure at any point, firstly look at the bottom left corner of the screen to see if a message or prompt is visible that will help you. Please make a note of any error messages, and what you were doing when the errors occurred. This is vital information if the support desk is to understand the problem.
- look in this manual in the relevant section to check that you have followed the correct routine
- quit out of OPAS back to the operating system (e.g. the Windows desktop), then run OPAS again and see if the problem has disappeared
- quit out of OPAS back to the operating system (e.g. the Windows desktop), shut down the computer, wait for one minute, switch the computer on again, run OPAS again and see if the problem has disappeared.

5. Backups

It is essential that you take adequate backups; we recommend that you take daily full backups of OPAS. We cannot be responsible for your data. If a problem occurs, however caused, we may ask that you restore your most recent backup. Remember that if a computer, network or power problem occurs and your OPAS data is damaged, you have potentially lost all work done since the last backup, and will have to re-do that work, after restoring from the backup.

If your technical support personnel are in any doubt as to what should be backed up, they should contact the Support hotline.

It remains your responsibility to ensure that these backups are taken and that you are familiar with both the backup and the restore routines in use.

6. Contact summary

Martin Craven

Wynnlodge Limited
5 The Willows
Strensall
York
YO32 5YG

Phone: 01904 492425
Fax: 01904 492772
E-mail: martin@wynnlodge.co.uk

Re: Programming issues
Wish list items for future versions
Purchase of further licences
Renewal of annual support

Linda Pawson

Wynnlodge Limited
5 The Willows
Strensall
York
YO32 5YG

Phone: 01904 492425
Fax: 01904 492772
E-mail: linda@wynnlodge.co.uk

Re: Wish list items for future versions
Purchase of further licences
Renewal of annual support
Additional training requirements
Points concerning the manual

7. Copyright

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Moving around OPAS

- 1. Logging On**
- 2. Box menus**
- 3. Icons**
- 4. Pull-down menus**
- 5. Pop-up menus**
- 6. Standard menu options**
- 7. Standard keys**
- 8. Moving around records**
- 9. Tables**
- 10. Printing to screen**

Moving around OPAS

1. Logging on



The method of running OPAS will depend on the operating system used by your PC. If your PC is running Windows 95, 98 or NT, selecting the OPAS icon from the Windows Desktop runs OPAS.

When you double click on the OPAS icon you will be asked for your User ID. During the 'Familiarisation session' each person who needs to use the system will have been set up as a user. User names must be unique and unless you have asked otherwise we will have set them up to be your forename. (New members of staff will need to be set up in **Utilities – Users**. [See Utilities – Note 54. Users](#))

Type in your user id and press **Enter**

You are then asked for your password. **This must be entered in the correct case i.e. if your password has been set up in capital letters then you must type your password in upper case. When we set your initial password, it will be in capital letters.**

Type in your password and press **Enter**

If you get the error **Invalid Password** then you have either typed the wrong password or you have typed it in the wrong case. You will get three attempts to get your password correct. If the password is typed in incorrectly three times you will be taken out of the log on screen and you will have to double click on the OPAS icon to start again.

Your User ID determines what parts of the system you can use: if you forget either your User ID or your password, or you find you need to access parts of the system which are only available to the administrator, please ask your system administrator.

It is a good idea to keep your password a secret. It is a **bad** idea to write it down, so try to make it easy to remember, without being too easy to guess!

Your password can be changed at any time by selecting **Utilities – Password**.

Training Area

By logging on with the User ID of **Trainee** you will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.

The ways in which you can use the keyboard and the mouse to select the different menu options are covered below. You should become familiar with this section before proceeding, so that you are confident with using the keyboard and the mouse or whatever combination suits you best.

2. Box menus

An item on a box menu such as the main menu can be selected by:



double-clicking with the left mouse button on the item required (move the tip of the cursor arrow onto the item, then click twice in quick succession with the left mouse button)

pressing the first letter of that item on the keyboard:

if that letter is unique (i.e. no other item on that menu begins with the same letter), the item is selected immediately

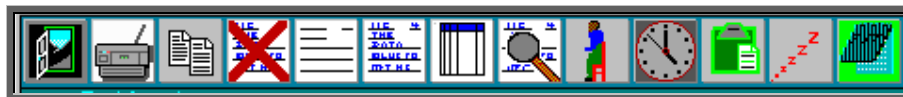
if another menu item begins with the same letter, the selection box moves to the first item beginning with that letter: pressing the letter again moves the selection box to the next menu item beginning with that letter; when the right item is selected, press **Enter**.

using the cursor keys (arrow keys), move the selection box to the required item, then press **Enter**.

using the space bar and backspace key, move the selection box to the required item, and then press **Enter**.

3. Icons

Once you select an option such as **Patients**, icons will show near the top of the screen. Very occasionally, icons may seem to be missing: if this happens, quit out of OPAS and run the system again to bring them back.



Icons are a quick way of accessing some of the more common actions you will carry out.

To select an icon, single click with the left mouse button on that icon. Remember that the tip of the cursor arrow must be on the required icon.

If you are not sure what a particular icon does:

- move the cursor into that icon with the mouse

- hold down the left mouse button (but do not let go)

- a line of information at the bottom left of the screen appears which tells you what that icon does

- if you want, move the cursor to another icon (still holding down the left mouse button): the text changes to show what that icon does

- if you want to select one of the icons, make sure the cursor is in that icon and let go of the left mouse button

- if you do not want to select any of the icons, move the cursor away from the icon area and then let go of the mouse button.

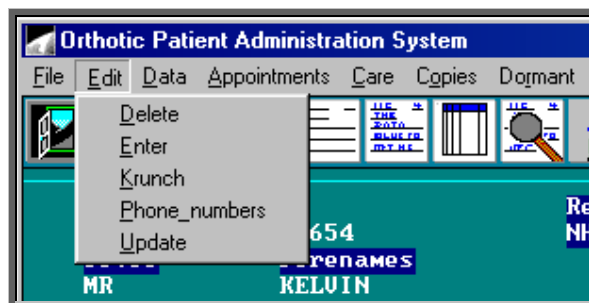
The icons on any particular screen give access to the more common actions available from that screen, but all the actions can be selected from the pull-down menus.

4. Pull-down menus

These give access to the full range of actions available from that particular screen and are above the icons.



To select a pull-down menu item with the mouse, move the tip of the cursor arrow onto that word and single click with the left mouse button. Some of the items carry out that action immediately while others show a sub-menu, from which you select the required item in the same way.



If you prefer not to use the mouse you can select options from the pull-down menu using the keyboard.

To select a pull-down menu item from the keyboard, press and release the **Alt** key: the first menu item will be highlighted.

Either press the underlined letter of the item required (e.g. E for Edit), or use the arrow keys to move the highlight to the item required, and then press **Enter**.

If a sub-menu appears, again use either the arrow keys to move the highlight or press the required underlined letter (e.g. U for Udate).

5. Pop-up menus

These appear when you are entering data into certain fields and make life easier by allowing you to select from a list of relevant data rather than having to type the information in. This saves time and prevents typing errors.

In some cases, the pop-up menu appears automatically as soon as you move into that field; in other cases the pop-up menu appears when you press **Tab**.

(N.B. Where pop-up menus appear automatically can be controlled by you within **Utilities – Choices – Defaults – see Utilities - Note 7. Choices - Defaults**)

An example is when entering the GP into a new patient's record.

Doctor	Practice	Postcode	Referenc
ANDERSON MG	LENSFIELD ROAD MED PRAC.	CB2 1EH	G0102926
ADLER S	682 FINCHLEY ROAD	NW11 7NP	G0105912
ALEXANDER PJ	10 WEST END	HU14 3PE	G0107725
ANDERSON CF	THE HEALTH CENTRE	TS18 1HU	G0108324
ASHER PN	94-96 HOLLOWAY ROAD	N7 8JG	G0108922
ARTHUR RA	153 CANNON HILL LANE	SW20 9DA	G0109325

All pop-up menus work in the same way.

You can search for the record you want in any of the columns shown (in this example Doctor, Practice, Postcode or Reference). To search in a particular column, move the green highlight into that column by using the right and left arrow keys on the keyboard or by clicking on the column with the mouse)

Then type the data you want to find. As you type, the system changes the records to being in alphabetical order by that column and zooms in to the nearest match to what you have typed.

Thus if you are searching for a particular GP by name and type 'M' the first GP with a name beginning with **M** shows:

If you now type 'AC' the first GP beginning with **MAC** shows:

If you now type 'H' the first GP beginning with **MACH** shows:

Thus the quickest way of selecting a record is to type enough to get quite close to the record required, then use **Up**, **Down**, **PgUp** and **PgDn** to move the highlight to the required record, then press **Enter** to select that one. How many letters you will have to type to get close to the required record depends on how many adjacent records there are: for instance if the GP's name begins with **X**, you are not likely to have to type any further letters to zoom in closer.

The letters typed to zoom in are case-sensitive, so if the list contains upper-case data, you must type the search letters in upper case, not lower case. If the search jumps to the last record, you have probably entered your data in the wrong case.

6. Standard menu options

The following options appear on a number of screens and are very similar or identical in operation.

For each one, the various ways in which it can be selected are shown:

the icon (if any)

the pull-down menu (if any), showing the underlined letters

the key press (if any)

Exit



File, Exit

Esc

or

single click anywhere on the screen with the right mouse button

This takes you back one stage e.g. to the previous menu. From the Main Menu, it allows you to quit to the Windows Desktop. In general, **Esc** will abandon what you are currently doing and take you back one stage.

Enter



Edit, Enter

This allows you to create a new record on the current screen.

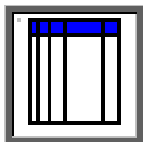
Update



Edit, Update

This allows you to change the data on the current record.

Browse



Data, Browse

This changes the screen from showing the detail of one record to showing a list of records, with one line per record.

Orthotic Patient Administration System			
File Edit Data Appointments Care Copies Dormant History Mailing Notes Paslink Prescriptions Sort This			
Surname	Forenames	Hospital No	Address
HERRIOT	JAMES	4454544	21 James St
DOE	JOHN	TEMP000012	Room 101
AIR	JANE	AIR0000001	44 Longley Road
BLOGGS	FREDA	AIR0000002	12 Set Street
CRESSWELL	JANINE	TEMP000013	5 Thomas Street
LAWSON	KATHRYN	TMP000002	22 Railway Cuttings
HEAUER	SYDNEY	S7654321	70 HARTOPP ROAD
SALBY	JACQUELINE	H123456	2 HAUEMERE DRIVE
HEAUER	SYDNEY	F381231	70 HARTOPP ROAD
SALBY	JACQUELINE	F378833	2 HAUEMERE DRIVE
PARGETTER	ELISABETH	TMP000003	LOWER LOXLEY HALL
GREENAWAY	JENNIFER	1464094N	12 DENBIGH DRIVE
MCLACHLAN	SARAH	TMP000004	1755 ROBSON STREET
SMITH	JOHN	ZQ123456	WITHINS NURSING HOME
JONES	AARON	00361807	4 CHILHAM ST
JONES	AARON	01720674	36 CARLTON RD
THOMLOW	ANGELA MARY	01683195	55 KILSBY CLOSE
HAMILTON	JEANETTE	01232195	4 MACKENZIE GROVE
FRENCH	TERRY	X232323	23 HENRY STREET
JONES	FRANK	565653	28 HUMBER ROAD

When you change into browse (list) mode, the record which you are currently looking at will show at the top of the page. To see previous records, use the up arrow or **PgUp**.

This is a toggle option so by selecting Data, Browse again you will return to seeing just one record.

Patients

Registered: 25/02/2000 By ROOT
 Last Update: 22/10/2003 By LINDA
 NHS No 999-999-9999 D O B 11/11/1924 age 78
 Title Forenames Surname D O D
 MR JAMES HERRIOT Sex M Ethnicity
 Address 44 Main Avenue Mailing 44 Main Avenue
 Address DOR YAD
 Town Jamestown Jamestown YAD
 County Middlesex Middlesex
 Post Code JT1 2ER JT1 2ER
 Home Phone 01234 567890 Mobile:
 Work Phone 01234 654321 Fax:
 Email james.herriot@hotmail.com G P PCG 5M6
 G9003459 GIBSON PW

Find



Data, Find

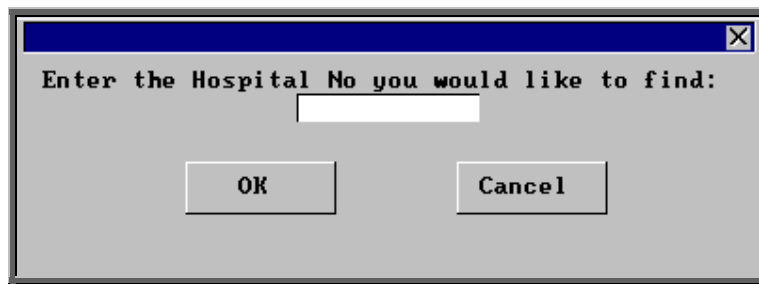
This allows you to search for a particular record e.g. if you are in the **Patients** screen, it allows you to find a particular patient.

When you select Data, Find, a list of fields that you can search by will appear for you to select from. The fields shown depend on the screen you are using at the time (Patients, Orders etc).

Orthotic Patient Administration System

Hospital_No NHS_No D_O_B Surname Shortname Post_Code GPref G_P Sequential_Search

Select the field you want to search on: for instance, if you want to find a patient and you know their Hospital Number but not their Surname, you would select Hospital_No.



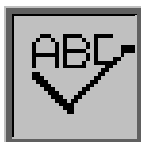
Then type the data you want to find and select OK by clicking on the OK button with the mouse or by pressing **Enter** twice.

You do not need to type all of the data e.g. if you are finding the surname **Thistlethwaite**, you could just type 'Thistle' and the system will find the first patient with a surname beginning with **Thistle**.

Using Find also automatically sorts the records in order by the field you have chosen: for instance, if you use Find to find a particular surname, the records will then be in order by surname. You may find it useful to change into browse mode either just before or just after using Find, since it will be easy to see patients with similar surnames to the one the system has selected as being the best match; this may help you check that you have the correct patient.

If the field you want to use to find is not shown in the list (e.g. a patient's NHS Number), you can use Sequential_Search to search on any field in the database: a list is shown, from which you select the field required by moving the pointer and pressing **Enter**. This method, although it allows you to find using any field, is much slower than selecting the field required from the main list.

Sort



Sort

This allows you to change the order of the records shown on the screen e.g. you can put the patients in order by Surname.

When you select Sort you will be asked the field you wish to sort by. The specific fields shown depend on the screen you are using at the time (Patients, Orders etc).

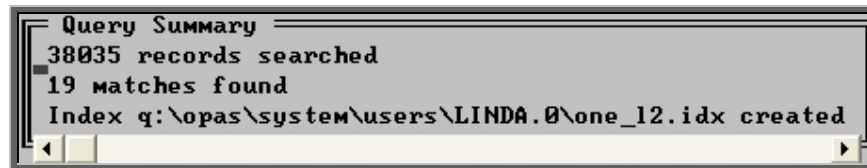
Select the field you want to sort on: for instance, you may want to put the patients into order by Surname. You are then given three options.

Whole_File puts the whole database into order: this is the option you would normally select

One_Only allows you to select only records that match the criterion you choose: for instance, you might want to see only patients with the surname Bloggs. The difference between using this and using Find to find Bloggs is that using Find shows all the records, with the current record being the nearest match, but Sort, One_Only shows only the records selected. This is useful if, for instance, you want to send a letter to only those patients

Range allows you to select records within a range, for instance patients with surnames from **A** to **C**. You are asked to enter the lower, then upper limit: note that if you want to find patients from **A** to **C**, i.e. including **CZERNY**, you must enter **CZZZ** as the upper limit. Entering just **C** as the upper limit will not include any patients after **C** in the alphabetical list of patients, e.g. **CHARLES** will not be included.

Both One_Only and Range show you the number of records found that match the criteria you set and isolates those matches (by placing them in an index).



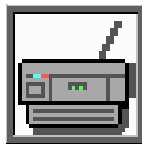
Press **Esc** to remove the Query Summary box. Any reports or letters produced now will only include those in the index created.

Sort, Special_Sorts shows a list of pre-defined sort definitions for specific purposes.

This list initially includes all the sort routines available, most of which will not be relevant to the screen you are currently using: to show only the relevant ones, select This_View from the options at the top of the screen.

From here, depending on any restrictions applied to your login, you may be able to edit the pre-defined sort criteria and create new sort criteria: we advise you to tread carefully and make sure you know what you are doing first!

Print



File, Print

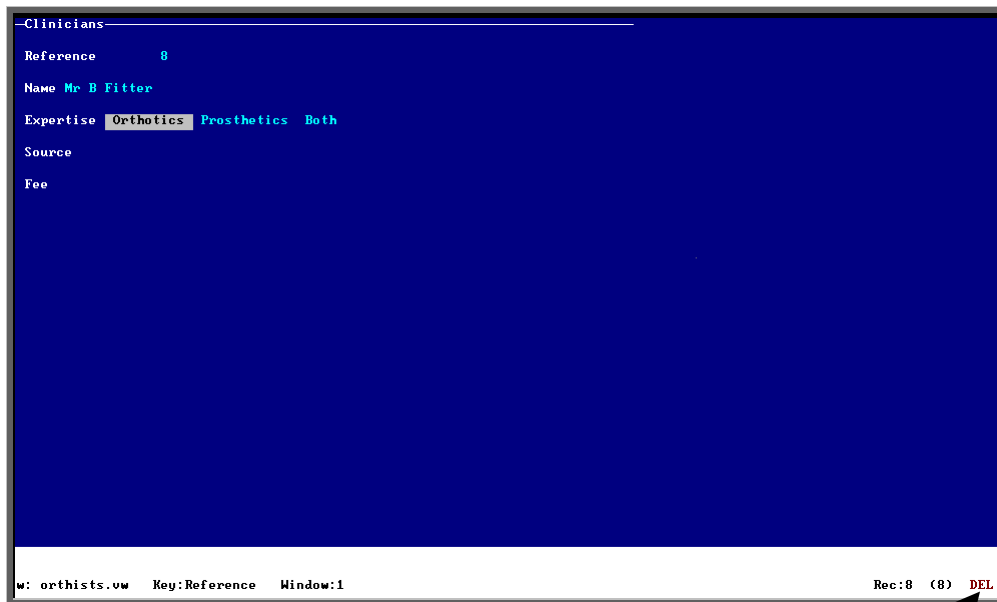
This normally shows a box menu with the printing options available from the screen you are in.

Delete



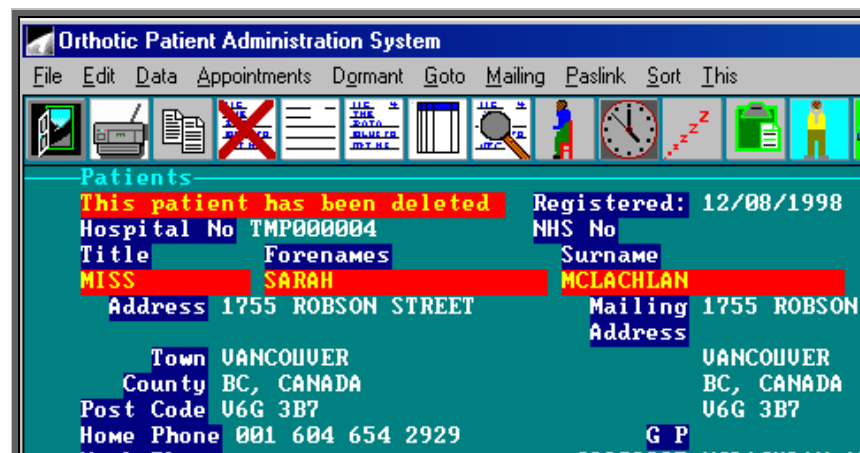
Edit, Del

This normally marks the current record (patient, order etc: whatever is currently showing on the screen) to be deleted.



Deleted records remain visible until they are permanently removed by the System Administrator. The record will show that it is deleted, either by showing **Del** at the bottom right corner of the screen

or by showing a message on the screen



If you delete a record by mistake, in most cases you can simply select Ddelete again and this will re-activate the record.

N.B. Take care when in the Appointment screens as appointments and sessions cannot be re-activated once deleted.

7. Standard Keys

When entering a new record or updating existing data, the following keys are standard.

F2	enters today's date
F3	moves back to the previous field
F4	moves on to the next field
F7	reformats multiple line fields to wrap correctly within the box
F8	deletes the data in the current field
Ctrl-F8	deletes the data in the current line (when in a table)
F9	inserts the same data that you entered in that field in the previous record
Ctrl-Enter	saves the current record
Esc	abandons the current record (you are asked whether to save changes if you were adding or editing data at the time)
Tab	where relevant, shows a list of choices (in a pop-up menu) from which a selection can be made. Either move the highlight with the arrow keys or, for longer lists e.g. the list of GPs, type the data needed: as you type, the system shows the nearest match. If more than one field is shown, you can move right or left along the columns shown to highlight the field you wish to search by. Then type the data required for that field. Press Enter to select the currently highlighted item.
Shift-Right Arrow	will highlight text.
Ctrl-C	will copy highlighted text.
Ctrl-X	will cut highlighted text.
Ctrl-P	will paste copied or cut text.

8. Moving around records

When you are looking at records, the following movement icons and keys are standard.



Moves to the next record **F6**



Moves to the previous record **F5**



Moves to the last record **Ctrl-End**



Moves to the first record **Ctrl-Home**



Page up **PgUp**



Page down **PgDn**

9. Tables

A table is a list of records within a master record: for instance a list of orders for a patient within that patient's record:

Orders				
Date of Or	Order No	Sup	Desc	Received
01/10/1999	G00254	888	COLLAR	01/10/1999
20/07/1999	G00242	888	COLLAR	20/07/1999
19/07/1999	G00241	012	SHOES	26/07/1999
26/05/1999	G00239	041	PIEDROS	08/07/1999
17/05/1999	G00234	083	SHOES	06/08/1999
04/05/1999	G00231	121	CALIPER	04/05/1999

Only a few records can show on the screen at one time, but there may be more. To see further records in the table, press **Alt-T** to see a list of tables available and select the required one (Orders in the above example) or click inside the table with the mouse. 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.

10. Printing to screen

A number of reports can be either shown on the screen or printed on the printer: if so, you will be asked to select:



If you select Screen, the first page of the report is shown:

New User NHS Trust Amount Spent by Cost Code 01/01/2000 to 31/10/2000					
Supplier	Cost Code	Order No	Patient	Sup. Inv. No	Gross
001	ABC123	G00284	BLOGGS	545456456	258.08
Total for Code					258.08
					258.08
Count					1
Total for Supplier					258.08
					258.08
Count					1
008	999999	PCG00325	CREADY	123456789	86.82
Total for Code					86.82
					86.82
Count					1
ABC123	G00269		BAKER	1234567	258.74
Total for Code					258.74
					258.74
Count					1
Total for Supplier					295.56
					147.78
Count					2
013	999999	G00266	JACK	EEERWER	40.60
	G00273		NICHOLSON	34567	116.40
Total for Code					157.00
					78.50
Count					2
batrupco.dfr					

The following keys can be used:

F5 shows the previous page

F6 shows the next page

F7 reduces the magnification

F8 increases the magnification

Also, the cursor keys can be used to move around the page.

When you have finished, press **Esc**. This will take you back to the choice of printing to screen, printer or file; so if required you could now print that report to the printer.

Patients

1. **Introduction**
2. **Entering a new patient**
3. **Finding a patient's record**
4. **Amending a patient's record**
5. **Changing the mailing address**
6. **Deleting a patient**
7. **Printing options**
8. **Prescriptions**
9. **Adding an order**
10. **Amending an order**
11. **Printing/Faxing orders in batch**
12. **Printing orders as they are raised**
13. **Re-printing individual orders**
14. **Re-faxing individual orders**
15. **Entering medical notes**
16. **Printing medical notes**
17. **Adding a care episode**
18. **Updating a care episode**

- 19. Printing care episode details**
- 20. Making an appointment**
- 21. Amending an appointment**
- 22. Cancelling an appointment**
- 23. Waiting List**
- 24. Carbon Copies**
- 25. This**
- 26. Printing HSA5/WF1 Forms**
- 27. Paslink**
- 28. GP**
- 29. Mobility**
- 30. Dormant patients**

1. Introduction

The **Patient** screen is the key screen in OPAS.

Only from the **Patient** screen can you add:

Patients	Quotations
Orders	Care Episodes
Notes	Contacts
Prescriptions	Patients to the waiting list
Prosthetic referrals	

From the **Patient** screen you can look at an individual patients:


Personal details	Care Episodes
Orders	Contacts
Notes	DNA's
Appointments	Waiting list entry
Prescriptions	Old address history

Also from the **Patient** screen you can:

- Make appointments
- Print HSA5 and WF1 Forms
- Print patient details
- Mail merge patient details with standard letters
- Send internal messages

Patient Screen

There are two versions of the **Patient** screen; the 'Long' and the 'Short'. The 'short' version of the **Patient** screen has been introduced for those users that, due to the speed of their network, find moving between patient records slow. The two screens work in the same way **except** you cannot add orders, notes or prescriptions when in the 'short' version of the **Patient** screen.

To toggle between the two versions of the screen click on the 'swap' icon  (or File, Swap)

Patient Screen (Long)

File Edit Data Appointments Dormant Goto Mailing Message Paslink Sort This									
Patients									
Hospital No 4454544 Title Forenames MR JAMES Address 21 James St Town Jamestown County Middlesex Post Code JT1 2ER Home Phone 01234 567890 Work Phone 01234 654321 Email james.herriot@hotmail.com					Registered: 25/02/2000 By ROOT Last Update: 24/02/2004 By LINDA NHS No 999-999-9999 D O B 11/11/1924 age 79 Surname D O D HERRIOT Sex M Ethnicity Mailing 21 James St Address Jamestown DOR YAD Middlesex YAD JT1 2ER Notes: Mobile: Fax: G P PCG 5M6 G9003459 GIBSON PW				
Purchaser 1 NHS TRUST ConsRef: 2 Clinician Referrer Direct Access GP Private Patient N Inpatient N Exempt: Comments Alias					Directorate PCT Transport No transport required Until: Review Weight: Height: Activity:				
All patient notes MUST be treated as confidential									
Medical Notes									
Date	Notes							Category	
25/08/2000	Hospital number changed from TEMP000011 at 20:37:50							UPDATE	
05/11/1997	Diabetic								
Orders									
Date of Or	Order No	Sup	Desc				Received		
24/02/2004	G00422	048	SHOES						
Appointments									
Date:	Day	Time:	At:				With:		
22/10/2003	Wed	10:00	Appliance Department				Mrs Orthotiste		
Prescriptions									
No:	Desc:					From:	For:		
DNAs									
On:	At								
22/10/2003	10:00:00								
Carbon Copies									
DNAs 1									
Addresses									
Add:					PC:				
42 Main Avenue					JT1 2ER				

When you are in the 'long' version of the **Patient** screen, as well as being able to see the patient's personal details, there are summary tables showing brief details of that patient's

Medical Notes

DNA's

Orders

Carbon Copies

Appointments

Address history

Prescriptions

Only a few records are shown within the tables, but there may be more. To see further records in the table, press **Alt-T** to see a list of tables available. Move the arrow cursor (using the space bar on the keyboard) until the arrow cursor is pointing at the required one.



Alternatively click inside the table with the mouse. 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.

If you want to see full details of the orders, appointments etc that are summarised in the tables, choose the relevant icon or menu option from the top of the screen. Below are the icons and menu options for accessing the tables on the **Patients** screen.

Medical Notes



(or Goto, Notes)

Orders



(or Goto, History, Current)

Appointments



(or Appointments, Current)

Prescriptions

(Goto, Prescriptions)

Carbon Copies

(Goto, Copies)

Address history

(Goto, Addresses)

Patient Screen (Short)

Patients			
Registered: 25/02/2000		By ROOT	
Last Update: 24/02/2004		By LINDA	
Hospital No 4454544	NHS No 999-999-9999	D O B 11/11/1924	age 79
Title Forenames	Surname	D O D	
MR JAMES	HERRIOT	Sex M	Ethnicity
Address 21 James St	Mailing 21 James St		
	Address	DOR YAD	YAD
Town Jamestown	Jamestown		
County Middlesex	Middlesex		
Post Code JT1 2ER	JT1 2ER	Notes:	
Home Phone 01234 567890	Mobile:		
Work Phone 01234 654321	Fax:		
Email james.herriot@hotmail.com	G P	PCG 5M6	
	G9003459 GIBSON PW		
Purchaser 1 NHS TRUST			
ConsRef: 2	Clinician	Earliest: 10:00:00	
Referrer Direct Access GP	Directorate PCT	Latest:	
Private Patient N Inpatient N	Transport No transport required	Weight:	
Exempt:	Until: Review	Height:	
Comments		Activity:	
Alias			

Use 'FILE - SWAP' to return to the 'long' version of the Patient Screen

When you are in the 'short' version of the **Patient** screen, although you can not see the summary tables that are on the 'long' version of the Patient screen you can still access full details of the orders, appointments etc by choosing the relevant icon or menu option from the top of the screen.

Medical Notes



(or Goto, Notes)

Orders



(or Goto, History, Current)

Appointments



(or Appointments, Current)

Prescriptions

(Goto, Prescriptions)

Carbon Copies


(Goto, Copies)

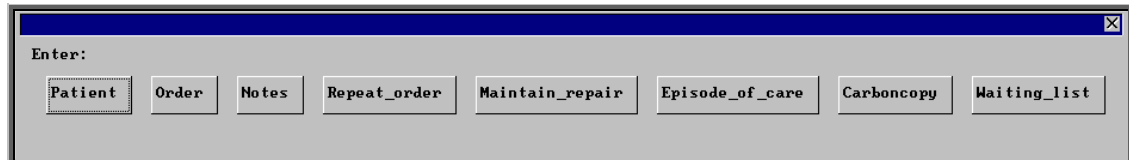
Address history

(Goto, Addresses)

2. Entering a new patient

Menu: Patients

To add a new patient, click on the 'enter' icon  (or Edit, Enter) and the box below will appear.



To select Patient, single click on the Patient button with the mouse, or type **P**, or press **Enter**.

At the bottom of the screen you are asked for the Hospital Number. If you know the Hospital Number for this patient, enter it; if not, type **?** and a temporary number will be allocated to this patient by the system. This temporary number can then be changed to the actual Hospital Number later by updating the patient. Temporary patient numbers are normally prefixed with TMP, but this can be changed if required ([see Utilities - Note 49. Order numbers](#)).

Once the hospital number has been entered, OPAS will check to make sure that a patient with that hospital number has not been added before. If it finds a patient with that hospital number you will be taken out of enter mode and the patient with that hospital number will be shown on the screen. If you have entered a hospital number that is not on OPAS a blank patient screen will appear so that the patient details can be entered.

Hospital No shows automatically as the number you entered and cannot be changed while entering a new patient. You can edit the hospital no later if you need to.

Registered shows automatically as today's date and cannot be changed.

By shows automatically as your login name and cannot be changed.

NHS No is the patient's National Health Service number and is optional.

D O B is the patient's date of birth: enter this as ddmmyyyy, e.g. 31121911. You do not need to put a / between the day, month and year – they will appear automatically.

Age calculates automatically from the *DOB* and cannot be changed.

<i>D O D</i>	is the patient's date of death and at this stage is bypassed by the system. It can be entered when updating a patient's record.
<i>Title</i>	is the patient's title. You can either type this in or select from the pop-up menu (press Tab if necessary to see the pop-up menu). Titles to appear in the pop-up should be set up in Utilities – Choices – Titles
<i>Forenames</i>	e.g. ALAN DAVID . If you type in lower case, it is automatically converted to upper case or proper case, depending on your requirements.
<i>Surname</i>	e.g. WILSON . If you type in lower case, it is automatically converted to upper case or proper case, depending on your requirements.
<i>Sex</i>	is automatically shown as M or F depending on the <i>Title</i> . If it is blank (because the title could be male or female (e.g. Doctor)), type in the appropriate letter.
<i>Ethnicity</i>	press Tab to select from the list of ethnicities, if required. (Ethnic Origins to appear in the pop-up should be set up in Utilities – Choices – Ethnicity)
<i>Address</i>	gives five lines for the address.
<i>Mailing Address</i>	as you Enter through the mailing address fields, the details in the main address will automatically appear. If the patient has a different address for correspondence to their normal address, e.g. if they are temporarily in a convalescent home, delete the Mailing Address details using F8 on each line and type the temporary address.
<i>Home Phone</i>	enter if required.
<i>Work Phone</i>	enter if required.
<i>Email</i>	enter if required.
<i>Mobile</i>	enter if required.
<i>Fax</i>	enter if required.
<i>GP</i>	select from the pop-up menu if known.
<i>Notes</i>	indicate whether paper notes are held by entering Y(es) or N(o)
<i>Purchaser</i>	select from the pop-up menu (normally the NHS Trust). (Purchasers to appear in the pop-up should be set up in Utilities – Choices – Purchasers)


<i>ConsRef</i>	select from the pop-up menu of Referrers. (Referrers to appear in the pop-up should be set up in Utilities – Choices – Referrers)
<i>Clinician</i>	select from the pop-up menu if required. (Clinicians to appear in the pop-up should be set up in Utilities – Choices – Clinicians)
<i>Private Patient</i>	type Y if the patient is a private patient, otherwise type N .
<i>Inpatient</i>	type Y if the patient is an in-patient, otherwise type N .
<i>Transport</i>	select from the pop-up menu the method of transport this patient normally requires. (Transport options to appear in the pop-up should be set up in Utilities – Choices – Transport)
<i>Earliest</i>	enter the earliest appointment time the patient can attend
<i>Latest</i>	enter the latest appointment time the patient can attend
<i>Exempt</i>	enter the prescription charge exemption evidence if applicable.
<i>Until</i>	if the exemption evidence has been entered, enter here the date of its expiry, in the format ddmmyyyy.
<i>Review</i>	enter the date the patient is to be reviewed, in the format ddmmyyyy.
<i>Weight</i>	enter the patients weight in kilos if known.
<i>Height</i>	enter the patients height in metres if known.
<i>Activity</i>	enter the patients mobility on a scale of 1 to 5 (1 being low – 5 being high).
<i>Comments</i>	enter any additional comments required for this patient.
<i>Alias</i>	enter any additional information regarding the patient's name i.e. maiden name or name patient may be known by other than their birth name.
<i>DOR</i>	is District of Residence. If <i>Auto-update DOR</i> is set to Yes in Utilities – Choices – System , this will be automatically populated when you have finished entering the patient details if a valid postcode is entered in the <i>postcode</i> field of the address.

The **Patients** screen can be customised in order to control which fields have pop-up menus appearing automatically, and which fields you have to press the **Tab** key to access the pop-up menus. Also, if you mainly enter the same details in a field i.e. *County*, this field can be set to default to the required County to cut down on typing (see **Utilities – Note 8. Choices – Defaults**).

3. Finding a patient's record

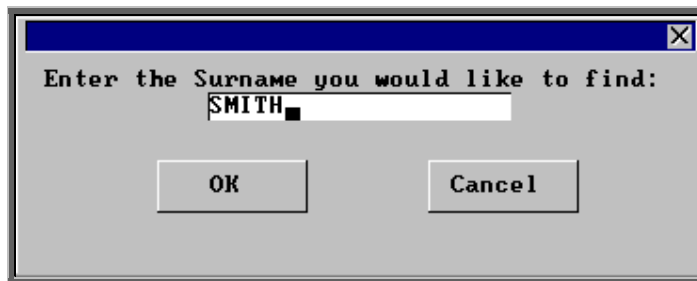
Menu: Patients



To find a patient click on the 'find' icon  (or Data, Find) and the menu at the top of the screen will change so that you can choose how you wish to search for the patient.




Click on the field that you wish to search by (Surname, Shortname and Hospital_No are the most frequently used).



Enter your search criteria in the pop-up box, (In this example you would type the patient's Surname) and then click on **OK** or press **Enter** twice. N.B. Searching by Surname is case sensitive i.e. you must type the surname you are looking for in the same case (capitals or proper) as it appears on the patient record

You will then be taken to the patient record with the nearest match. If there is more than one patient with the same surname you will see the first patient with that surname. The patient's are now in alphabetical order of their surname so by clicking

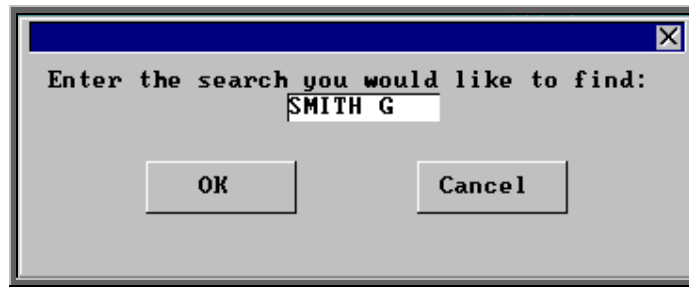


on the 'arrow' icon  (or **F6**) you can step through the patients with that surname until you find the patient you are looking for. Alternatively, select the 'browse' icon




 (or Data, Browse) to see those records that match your search in a list. (*see Moving around OPAS - Note 6. Standard menu options*).

If you are looking for a patient with a surname that occurs frequently it may be quicker to search by Shortname as you can then specify the initial of their forename to narrow down the search. Type in the first 8 characters of the surname, a space, and then the initial of the forename. N.B. Searching by Shortname is not case sensitive i.e. it does not matter if you type the Shortname you are looking for in upper or lower case.



This will then take you to the first G SMITH. If there is more than one G Smith look for the required patient by stepping through the records by clicking on the 'arrow'



(or **F6**), or by selecting the 'browse' icon  (or **D**ata, **B**rowse) to see those records that match your search in a list. Note: When searching by Shortname the patient records will not be in true alphabetical order. I.e. in the example above, all the G Smiths will appear together but Geoff may come before Gary.

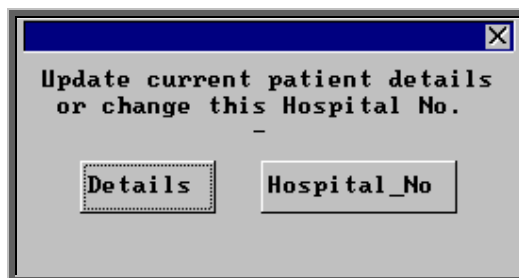
4. Amending a patient's record

Menu: Patients

To amend a patient find the patient you wish to edit and click on the 'update' icon



(or **E**dit, **U**pdate) and the box below will appear.



Details

If you select **Details**, then you will be taken to the *NHS Number* field in the patient screen, as this is the first field that can be changed. (*Hospital No* cannot be changed here)

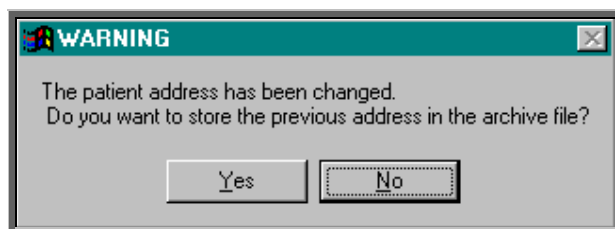
To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change with the mouse.

You can use **Tab** with the following fields, to show a pop-up menu from which to choose an alternative:

Title
Ethnicity
GP
Purchaser
ConsRef (Referrer)
Clinician
Transport


When you have finished updating the patient record, press **Ctrl-Enter** to save the changes.

If any of the changes made are in the patient's address, you will be asked if you would like to keep the old address in the address archive.



Select **Yes** if you wish to keep a record of the old address.

Previous addresses of a patient can be seen by finding the Patient record and clicking on **Goto** at the top of the screen and then selecting **Addresses**. If you only want to

see the last address for the patient, then press the 'arrow' icon  (or **PgDn**) to the bottom of the screen to the *Addresses* table where you can see the first line of their last address and postcode.

DNA's On: 22/10/2003 At: 10:00:00		Carbon Copies
DNA's 1		
Addresses Add: 42 Main Avenue PC: JT1 2ER		

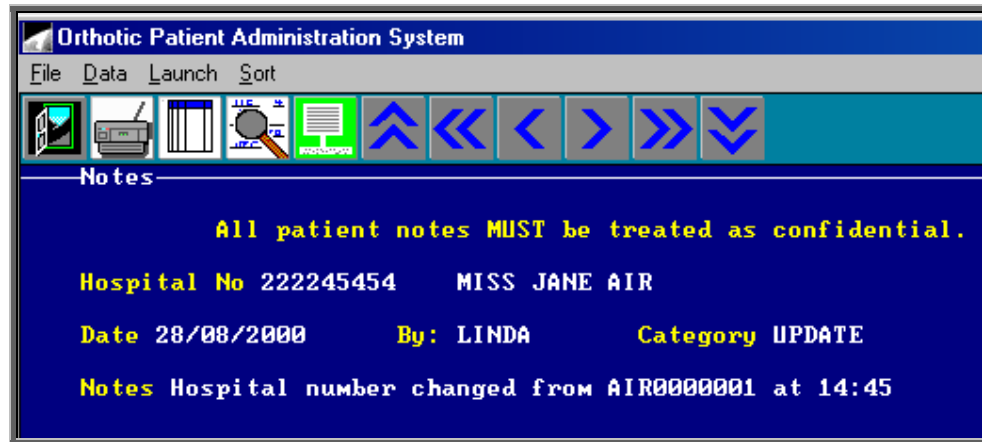
Hospital number

If you select Hospital_No, you are prompted to enter the new Hospital Number.

This is used to enter the correct Hospital Number for a patient who's Hospital Number was not known when they were entered onto the system and therefore a temporary number was allocated or the Hospital Number was entered incorrectly.

When you change the Hospital Number, it will automatically change all associated records for that patient, e.g. orders and appointments. Also a note will be created showing

- date and time the hospital number was changed
- who made the change
- what the original hospital number was



Whether you change the details or the hospital number, the *Last Update* field at the top of the patient record will be updated accordingly.



5. Changing the mailing address

Menu: Patients

This allows you to enter a new mailing address for the patient, or delete the current mailing address. This is used if the patient changes address temporarily, e.g. by going


on holiday, so that the permanent address is retained and a temporary address for correspondence is used in the meantime.

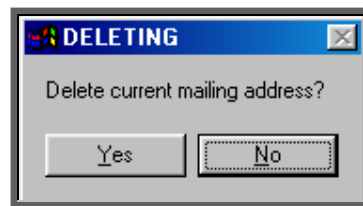
If a temporary mailing address is shown for a patient, that address is used for letters; if not, the permanent address is used.

To add a new mailing address or to change an existing one, click on the 'mailing' icon



(or Mailing, Intput). You are prompted (in the bottom left corner of the screen) to enter each line of the new temporary mailing address in turn. The current temporary mailing address (if any) is shown and can be changed or deleted line by line using **F8** and the new temporary address typed.

To delete a mailing address, click on the 'delete mailing' icon  (or Mailing, Delete). You are prompted to confirm deletion and the temporary mailing address is deleted.



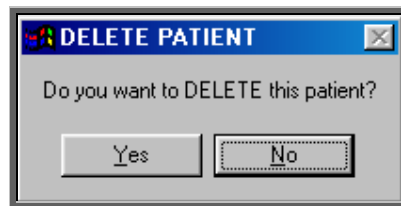
6. Deleting a patient

Menu: **Patients**

To delete a patient find the patient you wish to delete and click on the 'delete' icon




(or Edit, Delete) and the box below will appear.



If you still want to delete this record select **Yes**. Otherwise select **No**.

On confirming deletion, that patient's record is marked as deleted and a message shows:


-Patients-			
This patient has been deleted		Registered: 24/06/1999	By ROOT
		Last Update: 20/10/2003	By LINDA
Hospital No	12345QWERTY	NHS No	623-456-7894 D O B 29/12/1956
Title	Forenames	Surname	D O D
MR	KELVIN	BLOGGS	Sex M Ethnic
Address 14 Main Avenue		Mailing 14 Main Avenue	

The patient remains in the file and, if deleted by mistake, can be undeleted by simply clicking on the 'delete' icon  (or Edit, Delete) again.

Deleting a patient does not delete any orders or appointments for that patient.

Deleted patients can be moved from the live **Patients** file into the **Ex-Patients** file by running **Utilities - Ex-patients - Archive**. You must take a back up before running the archive option and be the only user in the system. (see **Utilities - Note 44. Ex-patients**)

Marking a patient as deceased

If a patient dies, find their patient record and click on the 'update' icon  (or Edit, Update) and the box below will appear.

Update current patient details
or change this Hospital No.

—

Details

Hospital_No

Select **Details** and move to the *DOD* (Date of Death) field. Input the date of death and press **Ctrl-Enter** to save the changes.


The patient record will then show that the patient is deceased.

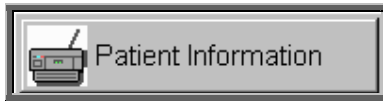
-Patients-			
This patient is deceased		Registered: 24/06/1999	By ROOT
		Last Update: 20/10/2003	By LINDA
Hospital No	12345QWERTY	NHS No	623-456-7894 D O B 29/12/1956
Title	Forenames	Surname	D O D 20/10/2003
MR	KELVIN	BLOGGS	Sex M Ethnic
Address 14 Main Avenue		Mailing 14 Main Avenue	

Deceased patients do not move to **Ex-patients** when the **Archive** is run. The patient record still needs to be deleted if it is to be included in the **Archive**.

7. Printing options

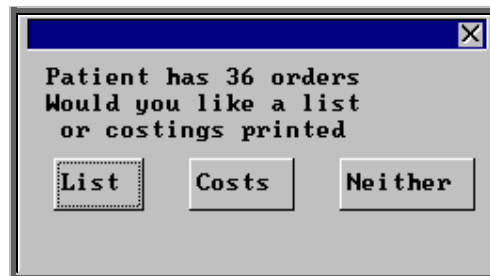
Menu: **Patients**

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



Patient Information prints the information for the current patient. If you are in the 'long' version of the **Patient** screen any Medical Notes for the patient will also be printed. If you are in the 'short' version of the **Patient** screen, the Medical Notes will not be printed.

You will then be told how many orders are recorded for that patient:



List

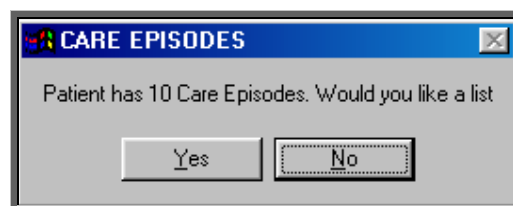
List prints a list of orders for that patient (Order number, Date of order and the general Description for that order).

Costs

Costs prints a more detailed list of orders for that patient (Order number, Date of order, the detailed Description for the first item on that order and total Cost of the order).

Select which orders report you require or select **Neither** if you do not require details of the patient's orders.

A box will then appear showing how many care episodes the patient has.



If you would like to print a list (showing Referral date, Assessment Date, Fitting date, Discharge date and Objectives for each episode), click on **Yes**. Otherwise select **No**.



By selecting **Custom Report** and then clicking on This_view, you will see the reports that can be run from the **Patient** screen. These are designed for use in conjunction with database queries. Standard reports available from the **Reports** option are more 'user-friendly'! (see [Reports - Notes 43 to 46](#))




By selecting **Mail Merge** and then clicking on This_view, you will see the letters and forms that can be printed from the **Patient** screen. You have the opportunity of setting up to 26 standard patient letters that can be merged with patient information. (For further information on how to set up these letters see [Utilities - Note 23. Choices - Letters](#)). There are also two forms, HSA5 and WF1, set up for you.

Below is a step-by-step guide to producing the HSA5 and WF1 forms but the same principle will apply for printing letters to individual patients. Where in the instructions below the relevant form is selected, the letter of your choice would be selected instead.

How to print HSA5 and WF1 forms

Find the patient you wish to produce a HSA5 or WF1 form for.

Click on This at the top of the screen to isolate that patient record.

Click on the 'print' icon  (or File, Print)

Select **Mail Merge**

Click on This View at the top of the screen

Highlight the form you wish to produce

Click on Run



You will be informed how many patient records are about to be merged with the form. If you have forgotten to isolate the patient first and it is telling you that you are about to merge will all your patient records, then this is your opportunity to Cancel from the option. Otherwise click on Ok to continue.




When you are asked if you would like to edit the document, click on No.

Warning: If you edit the document here, it will permanently change the form for future use.

A print box will then appear which will give you the opportunity to change the number of copies you wish to print from 1 if necessary. Click on OK to continue.


Once you have completed the merge you will be taken back to the patient record.

To be able to see all the patient records again click on the 'ABC' icon  (or Sort) and select Physical.

8. Prescriptions

Menu: Patients

If you use the prescriptions facility in OPAS (i.e. *Prescriptions* is set to **Always** in **Utilities – Choices – System**) then prescription details are entered for each patient and each order is assigned to a prescription. This means that the relevant prescription must be entered onto the system before an order can be entered and assigned to it.

To enter a new prescription, find the patient that you want to add a prescription for, click on the 'enter' icon  (or Edit, Enter) and the box below will appear.



If you do not use the prescriptions facility (i.e. *Prescriptions* is set to **Never** in **Utilities – Choices - System**), then Prescriptions will not appear as an option in the box above.

To select **Prescription**, click on the **Prescription** button with the mouse.

<i>Hospital No</i>	Hospital No will be brought through from the patient record.
<i>Patient</i>	Patient name will be brought through from the patient record.
<i>Sex</i>	(M)ale or (F)emale will be brought through from the patient record.
<i>DOB</i>	DOB will be brought through from the patient record.
<i>GPRef</i>	GP Ref will be brought through from the patient record and cannot be changed.
<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Description</i>	50 characters available to describe in simple words what the prescription is for. This description used here will appear in the description field of any orders raised against this prescription and will ultimately will appear on appointment letters. Therefore words that will be understood by the patient should be used. As well as being able to free type in this field you can also select a description from a pop-up list by pressing the Tab key. (Standard descriptions to appear in the pop-up should be set up in Utilities – Choices – Descriptions)
<i>Orthosis code</i>	Press Tab to select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes).

<i>Referrer</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Date</i>	Today's date will automatically be entered. You can overtype with another date if required.
<i>Length</i>	is entered as the number of years for which the prescription is valid.
<i>Order No</i>	is entered automatically by the system: it is a sequential number, not the number of an order raised against the prescription.
<i>Notes</i>	are entered as required.

Updating prescriptions

Find the patient that the prescription relates to and click on Goto, Prescriptions. Find the relevant prescription if there is more than one and then click on the 'update' icon



(or Edit, Update) to amend any of the details entered on the prescription.

Cancelling prescriptions

Prescriptions should not be cancelled. If you wish to cancel a prescription, follow the steps above for updating prescriptions, and amend the *length* of the prescriptions to '0' years. The prescription will then be no longer valid and orders cannot be assigned against it.

Expired prescriptions

Prescriptions appear in a red banner once they have expired.


Prescriptions			
No:	Desc:	From:	For:
1	SHOES	13/01/1999	3

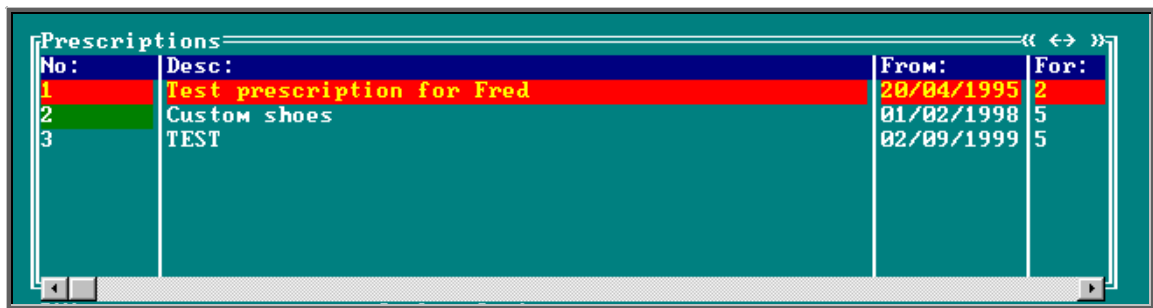
9. Adding an Order

Menu: Patients


To add an order, find the patient that you want to add the order for.

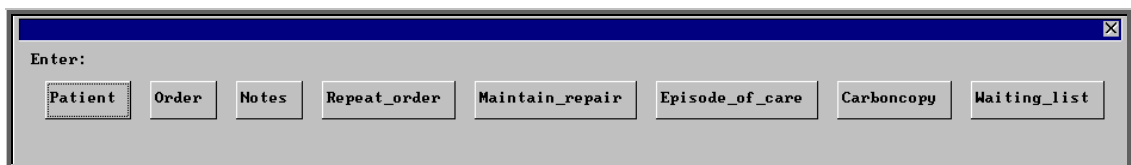
If you are not using prescriptions move onto step 2

If you are using prescriptions you will then have to select which prescription this order is going to be assigned to. To do this, press the 'arrow' icon  (or **PgDn**) so that you can see the prescription table. Select the relevant prescription by clicking on it with the mouse so that the green highlight appears. (Alternatively press **Alt-T**, select Prescription and move down the list with the arrow keys.) Prescriptions are highlighted in red if they have expired. You cannot add an order to a Prescription if it has expired.




No:	Desc:	From:	For:
1	Test prescription for Fred	20/04/1995	2
2	Custom shoes	01/02/1998	5
3	TEST	02/09/1999	5

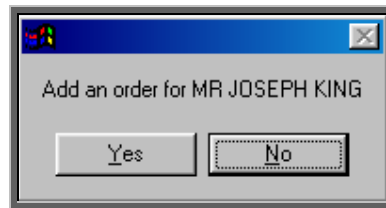
Click on the 'enter' icon  (or **Edit**, **Enter**) and the box below will appear.



Enter:

To select Order, click on the Order button with the mouse, or type **O**.

Note: If Order is not an available option you are in the 'short' Patient screen. To change back to the 'long' Patient screen, click on the 'swap' icon  (or **File**, **Swap**)



You are asked to confirm that you wish to add an order for this patient. If you have forgotten to find the patient before trying to add an order, this is your opportunity to abandon entering an order.

If you select **Yes** a new order will appear on the screen for you to complete.

Some of the fields will already be filled in for you. The fields below in red **must** be completed. The other fields are optional.

<i>Hospital No</i>	Hospital No will be brought through from the patient record.
<i>Patient</i>	Patient name will be brought through from the patient record.
<i>Sex</i>	(M)ale or (F)emale will be brought through from the patient record.
<i>DOB</i>	DOB will be brought through from the patient record.
<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Date of Order</i>	Today's date will automatically be entered. You can overwrite with another date if required.
<i>Order Number</i>	The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities - Note 49. Order numbers). You can overwrite this as long as the order number you type is unique (i.e. has not been used before and is unlikely to be automatically offered on a future order).
<i>Supplier</i>	Select the supplier you are ordering the goods from. (If the supplier does not appear in the pop-up list they will need to be added in Utilities - NSI - Suppliers.)
<i>Cross Ref or Hsp Order No</i>	This is an optional field where you may wish to quote a supplier's reference number or an internal reference number.
<i>Description</i>	50 characters available to describe in simple words what the order is for. This description will appear in appointment letters so should be terminology understood by the patient. As well as being able to free type in this field you can also select a description from a pop-up list by pressing the Tab key. (Standard descriptions to appear in the pop-up should be set up in Utilities - Choices - Descriptions)

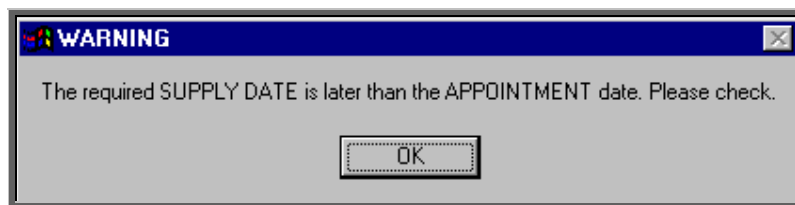
<i>Orthosis Code</i>	This is a mandatory field. You must select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes)
<i>Referrer</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>In-patient</i>	Type N for No or Y for Yes.
<i>Paid</i>	If the patient has to pay for the goods, (e.g. the orthosis incurs a prescription charge) the date they pay can be entered here in the format ddmmyyyy. To leave this field blank press the Enter key.
<i>Receipt</i>	If the patient has to pay for the goods, the receipt number can be entered here.
<i>Amount</i>	If the patient has to pay for the goods, the amount they paid can be entered here.
<i>Expected Supply Date</i>	This date will be calculated from the Orthosis Code that was entered above. When the Orthosis codes are set up there is the opportunity to say how long that type of item takes to be delivered. If an Orthosis Code has been set up with a delivery of 7 days, the <i>Expected Supply Date</i> will show as 7 days from today's date. If the delivery field is not used when the Orthosis Code is set up, the <i>Expected Supply Date</i> will show as today's date. The date that appears can be overtyped with another date if required.
<i>ACO</i>	<p>What you enter here will determine what OPAS will do when you book the goods in as being received.</p> <p>A if the order will need an appointment to be made for fitting. When the order is received from the supplier, the system will automatically make an appointment.</p> <p>C if the order is to be collected but does not need an appointment: when the order is received from the supplier, the system will generate a collection letter to advise the patient that the order is ready for collection.</p> <p>E if the order will be fitted during an existing appointment for that patient. The system will check the existing appointments for the patient and link the appointment to the order by automatically entering the order details onto the appointment and inserting the date of the existing appointment into the <i>Appointment</i> field on the order. If the patient has more than one future appointment you will be asked to select which appointment you wish to link the order with.</p>

Appt	Date:	Time:	clinic:	orth:
1	22/10/2003	10:00	Appliance Department	Mrs Ortho
2	23/10/2003	09:15	Appliance Department	Mr Ortho

Select appointment

1
2

OPAS will also check that the appointment date is after the expected supply date on the order. If it is not, you will get the following message:



T if the order needs to be taken to a ward. The information will appear at the bottom of the next clinic and can appear on the clinic list if required.

O for any other circumstance: the system will not take any particular action when the order is received.

Time If you enter **A** in the *ACO* field, you must indicate how long an appointment the patient will need. The default length of your appointments (as set in **Utilities – Choices – System**) will automatically appear in the *Time* field but this can be overtyped.

Clinic If you enter **A** or **C** in the *ACO* field, you must say which clinic venue they need to attend or collect the goods from. A pop-up list will give you your available options. (Clinic venues to appear in the pop-up should be set up in **Appointments - Venues**)

Clinician If you enter **A** in the *ACO* field, you can state which Clinician they need to see. If the patient can see any Clinician then leave this field blank. If you have entered a Clinician on the Patient record, this will show through onto the order. If you need to add/edit the Clinician, press the **Tab** key to see the list of options.

Day If necessary, a day of the week can be specified for the appointment. Press the **Tab** key to see the list of options. If you enter a day here,

when the goods are booked in and OPAS finds the next available appointment, it will only look for available appointments on that day. Therefore, care should be taken that you do not enter a mismatch here i.e. by saying that they need to see Mr Clinician on a Monday when Mr Clinician only has a clinic on Fridays.

- Letter* If you enter **A** in the *ACO* field, you can state which letter type will be required for the appointment when it is made. The field will default to your default standard appointment letter (as set in **Utilities – Users**).
- Transport* If you enter **A** in the *ACO* field, you can state which type of transport the patient needs, if any. If you have entered Transport details on the Patient record, this will show through onto the order.
- Prescription* If you are using prescriptions, the prescription number will show automatically in this field.
- No*

Once the above fields have been entered you will be taken into the **Detail** box where details of the items to be ordered are shown.

- Code* Press the **Tab** key to see the list of items held in OPAS. This will show a combination of OPrice items, Non Scheduled Items (NSI) and stock items.

CODE	DESCRIPT
A014	ADDITIONAL CHARGE FOR BRIDGED OR ARHED WAIST
A015	ANY ADDITIONAL PADDING TO ONE SINGLE ITEM OF FOOTWEAR
A016	HIGH OR ELONGATED STIFFENER UP TO 150MM
A017	HIGH BOOT UPPERS EACH ADDITIONAL 25MM
A018a	LAMBSWOOL LINING UP TO 150MM
A018b	LAMBSWOOL LINING EACH ADDITIONAL 25MM

Start typing the item that you are looking for and the pop-up list will go to those items that match your search criteria.

Position the green highlight on the item you require and press the **Enter** key.

If the item you are looking for is not in the list, press the **Esc** key to make the pop-up list disappear and leave the code field blank. If the item is not in the pop-up list and it is an item you order regularly you can add the item as a Non Scheduled Item (**Utilities – NSI – Items see Utilities - Note 47. NSI**) so that it appears in the pop-up list in future.

- Description* If you have selected a schedule number in the *Code* field the description will automatically appear. If not, the description entered in the *Description* field above will appear.

- Orthosis Code* The Orthosis Code entered earlier on the order will automatically appear here. On most occasions this will be correct and pressing the

Enter key will take you to the next field. However, if you are ordering more than one item it may be that the Orthosis code entered earlier is not correct for both items. If you need to change the code on any of the order lines, press the **Tab** key to see the list of Orthosis codes available and make an alternate selection.

(V)AT

V shows the rate of VAT for that item, as

S standard
E exempt
Z zero-rated
R reclaim.

The VAT field will default to **S** but you can overtype this with an alternate VAT rate.

Qty

Enter the quantity to be ordered. This will default to 1 but can be overtyped. (The default *Qty* can be changed in **Utilities – Choices – Defaults**)

Price

If you have selected a schedule number in the *Code* field and there is a price in OPAS for the item from the supplier named above, then the price will automatically appear.

If the price does not appear automatically it will have to be entered manually. If this is an item you order regularly you can add the price as a Non Scheduled Price (**Utilities – NSI – Prices see Utilities - Note 47. NSI**) so that the price will appear automatically in future.

Enter as many lines in the detail section as are needed, but you **must** press **Enter** after entering the *Price*, so that the highlight moves on to the next line. If you don't, background calculations are not carried out by the system and problems may occur in the calculation of VAT. Once you have entered the last line it is safest to press **Enter** to move the highlight into *Code*, then **Enter** again to move it into *Description* then **Enter** again to move it into *Notes*.

Notes

Any additional information can be entered here.

Care Episode

If a care episode has been created for this patient, the order can be linked to the care episode by entering the care episode reference number. Press the **Tab** key to see the list of care episodes entered on OPAS.

More than one order can be linked to a care episode. When the goods are booked in against an order, if the ACO field has been set to **A** (Appointment) or **C** (Collection) an appointment or collection letter will not be produced until all the orders quoting that care episode have been received.

<i>Technician</i>	If required, a Technician can be specified for the order. This is for those hospitals with an internal workshop. Press the Tab key to see the list of options. The Technicians seen in the pop-up list are created in Utilities – Choices – Technicians .
<i>Ward</i>	If the patient is an in-patient the Ward they are in can be entered here. Press the Tab key to see the list of options. The Wards seen in the pop-up list are created in Utilities – Choices – Wards .
<i>Fitting Note</i>	This is a multiple lined field to enable extensive fitting notes to be entered.

Once you have finished entering data into the required fields, press **Ctrl-Enter** to save the order and to return to the patient record.

If you have instant print switched on, the order will print automatically at this point ([see Patients - Note 12. Printing orders as they are raised](#)).


10. Amending an order



There are two ways to amend an order. You can amend an order from the **Patients** screen or by going into **History**.

1. From the patient screen

Menu: **Patients**

Find the patient whose order you wish to amend.

Click on the 'orders' icon  (or **G**oto, **H**istory, **C**urrent) to show the current orders for that patient.

Use the 'arrow' icon  (or **F6**) to find the order you wish to edit, and then click on the 'update' icon  (or **E**dit, **U**ppdate).

You will be taken to the *Purchaser* field, as the Patient details cannot be amended.

To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change.


You can use **Tab** with the following fields, to show a pop-up menu from which to choose an alternative:

Purchaser
Supplier
Description
Orthosis Code
Referrer
Clinic
Clinician
Day
Transport
Code
Care Episode
Technician
Ward

When you have finished updating the order, press **Ctrl-Enter** to save the changes.

2. From History

Menu: **History - Orders**

Find the relevant order and then click on the 'update' icon  (or **E**dit, **U**date).

You will be taken to the *Purchaser* field, as the Patient details cannot be amended.

To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change.

You can use **Tab** with the following fields, to show a pop-up menu from which to choose an alternative:

Purchaser
Supplier
Description
Orthosis Code
Referrer
Clinic
Clinician
Day
Transport
Code
Care Episode
Technician
Ward

When you have finished updating the order, press **Ctrl-Enter** to save the changes.

Note: The difference between the two ways of getting to the order to amend is:

using **Patients – Goto, History, Current**: you first select the patient, then the order from the orders for that patient

using **History – Orders**: you find the order.

So if you know the order number, it is quicker to use **History - Orders**; if you only know the patient, it is quicker to use **Patients – Goto, History, Current**.

11. Printing/Faxing orders in batch

Orders are normally printed in batches (e.g. at the end of the day).

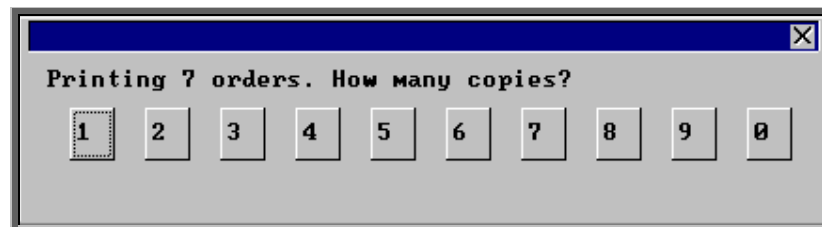
Menu: **History – Orders**

1. Printing to the printer

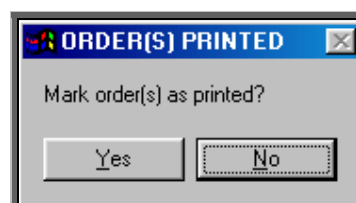


Click on the 'print' icon (or **F**ile, **P**rint) and then select **Orders** from the print menu.

The system finds those orders which have not yet been printed and asks how many copies you require:



After the required number of copies have been sent to the printer, you are asked whether to mark these orders as having been printed:




Since problems can arise with printers, we recommend that you wait until all the orders have emerged from the printer and been checked before responding **Yes** to this prompt. If there have been problems, e.g. the printer has run out of toner, respond with **No** and these orders will then print again next time this routine is used.

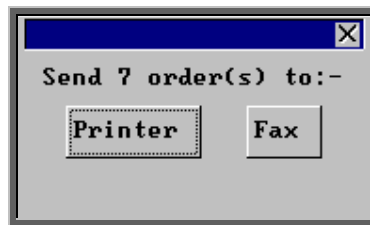
If you select **Yes**, when in fact the orders hadn't printed successfully, follow the steps in Note 3 below to reprint them.

2. Faxing orders direct to suppliers

Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen (**Utilities – Choices – System**)

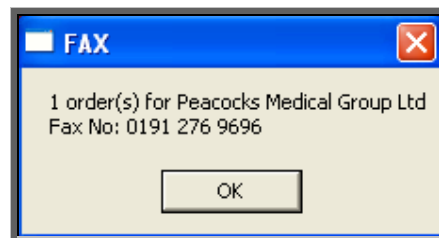
Click on the 'print' icon  (or **F**ile, **P**rint) and then select **Orders** from the print menu.

The system finds those orders that have not yet been printed and asks whether you wish to print or fax them.



If you select the **Printer** option by clicking on the **Printer** button with the mouse or by typing **P**, then you will continue as above by being asked how many copies you require.

If you select the **Fax** option by clicking on the **Fax** button with the mouse or by typing **F**, a prompt will appear giving the fax number for the first supplier on the orders.



On clicking **OK**, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

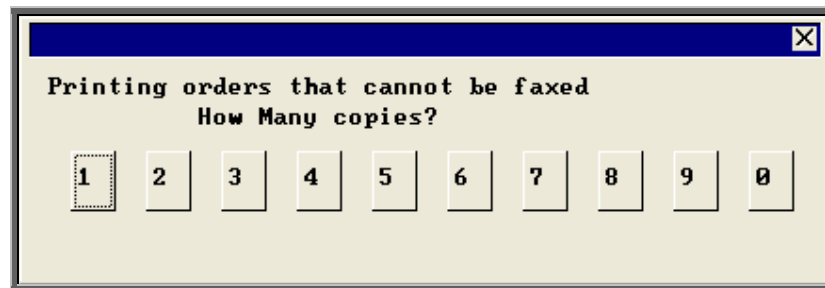
The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen. Once you know that the number remains, you will not have to make a note of the number in future.

Once the fax has been sent, if there are orders to another supplier, another prompt will appear with the fax number of the next supplier. This will continue until all the suppliers in the batch have been faxed.

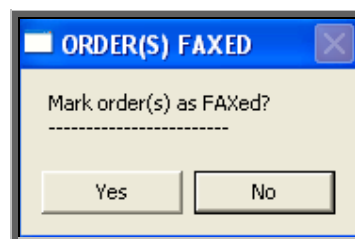
If orders are found for companies that are not set up for faxing (**Utilities – NSI – Fax see Utilities - Note 17. Choices - Fax**), the following prompt will appear.



Click on OK and then select how many copies to be printed instead..



Then you will be asked if you wish to mark the orders as faxed.



If you select **Yes** today's date will be entered in the *Printed* field on the orders and the orders will not be faxed again when orders are next printed in batch.

3. Reprinting/Refaxing orders

If you need to re-print orders printed today and marked as printed, e.g. because of a printer problem only discovered after the orders had been printed and marked as

printed, this is done as follows. (If you want to print/fax a specific order [see Patients - Note 13. Re-printing individual orders and Note 14. Re-faxing individual orders](#)).

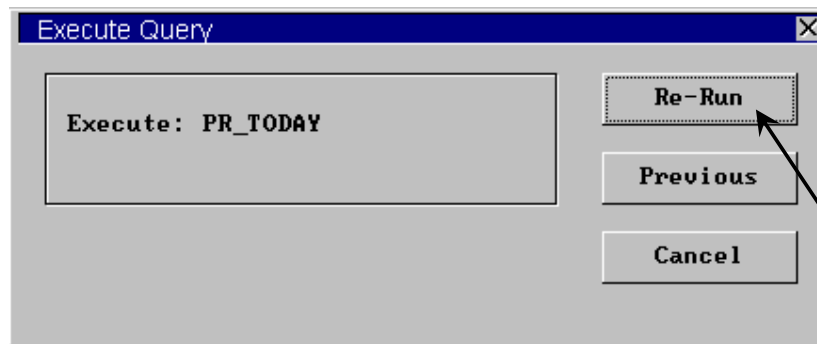
Menu: History – Orders

Click on Data and then Query

Click on This_view

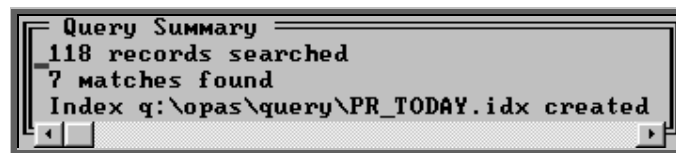
Using the down arrow key move the green highlight until it is on PR_TODAY

Click on Run




If you have not run this query before the option will be Run instead of Re-Run.

Click on Run or Re-Run.



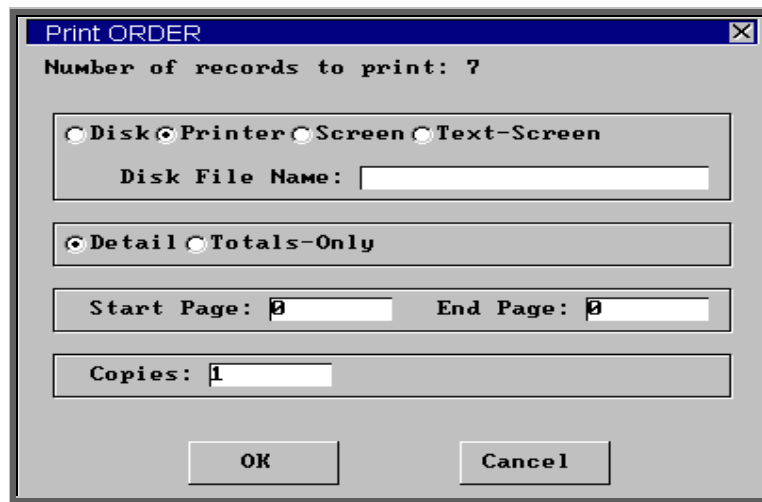
A Query Summary box will appear in the middle of the screen when it has found those orders where the printed date was today.

Press **Esc** once to remove the Query Summary box. The only orders you can see on the screen now are those that you need to reprint.

Click on the 'print' icon  (or File, Print) and select **Custom Report**.

Click on This-View and using the down arrow key move the green highlight until it is on *shortname* ORDER.

Click on Run.



Print ORDER

Number of records to print: 7

☐ Disk
 ☒ Printer
 ☐ Screen
 ☐ Text-Screen

Disk File Name:


☒ Detail
 ☐ Totals-Only

Start Page: End Page:

Copies:

OK Cancel

The Copies field will default to 1, but this can be amended if you need more than one copy. Then click on OK to continue.

Note: Until you come out of the **Orders** screen, the only orders you can see are those that you have just reprinted. To see all the orders again, either come out of **Orders** and then go back into the option, or click on the 'sort' icon  (or Sort) and select Physical.

12. Printing orders as they are raised

There is a switch in the system parameters that will result in orders being printed instantly i.e. as they are raised. This is an alternate method to batch printing ([see Patients - Note 11. Printing/Faxing orders in batch](#)). This function is not intended to be used if you are set up for faxing orders as the order will print regardless.

There is also the facility to e-mail orders direct to the supplier as they are raised ([see Orders - Note 10. E-mailing orders](#)).

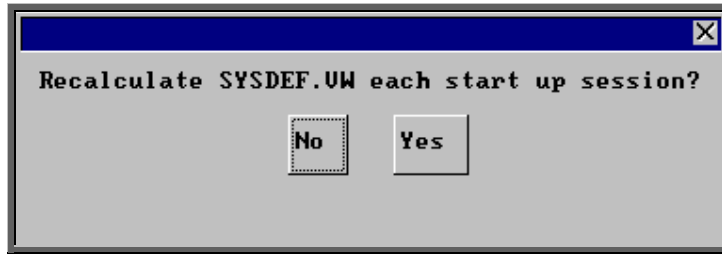
If you want each individual order to print automatically when you have finished inputting it, go into **Utilities – Choices – System** and enter the number of copies required in the *Orders* field.



Use large icons	Yes
Instant Invoice	1 GRN 2 Orders1

Leave this field blank if you wish to continue batch printing orders.

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




Press the **Enter** key.


13. Re-printing individual orders

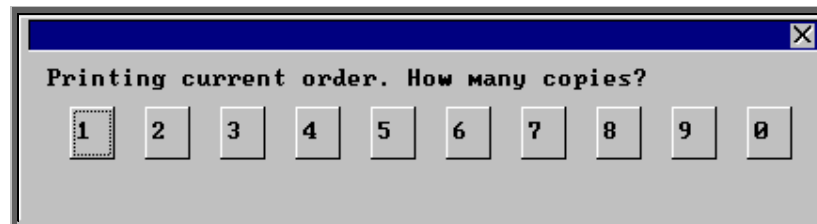
If you have lots of orders to print it is best to print them in batch ([see Patients - Note 11. Printing/faxing orders in batch](#)), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: **Patients**

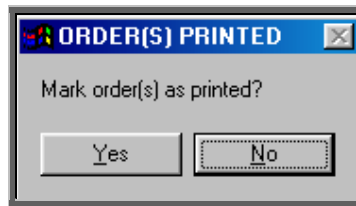
Find the patient whose order you wish to print.

Click on the 'orders' icon  (or Goto, History, Current) to show the current orders for that patient.

Find the relevant order, click on the 'print' icon  (or File, Print), and select **Orders** from the print menu.



After the required number of copies have been sent to the printer, you are asked whether to mark these orders as having been printed:



If you select **Yes** to mark the order as printed, the order will not be selected for printing when you next batch print orders from **History – Orders**.

You can print an individual order as many times as you need. The fact that it has been printed before, or that it has been marked as printed will not prevent you from printing a single order from the **Patient** screen.

14. Re-faxing individual orders

Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen (see [Utilities - Note 38. Choices - System](#))

Menu: **Patients**

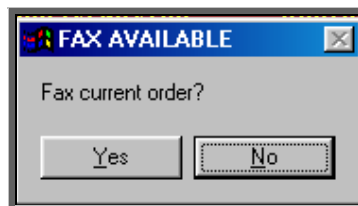
Find the patient whose order you wish to fax.



Click on the 'orders' icon (or Goto, History, Current) to show the orders for that patient.

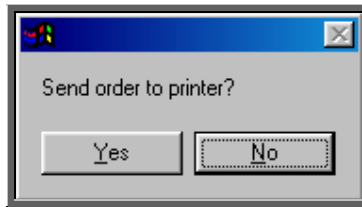


Find the relevant order, click on the 'print' icon (or File, Print), and select **Orders** from the print menu.



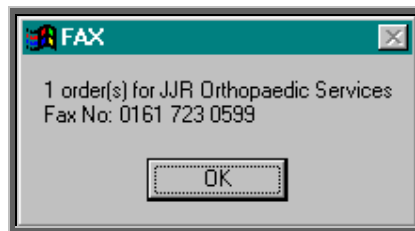
The above prompt will appear unless the supplier on the order is an internal stock supplier. If the supplier is **Stock** you will only be able to print the order and you will be asked how many copies are required.

If you do not want to fax the current order, and say No, the following prompt will appear.



On selecting Yes you will then be given the print box where you can choose how many copies you would like to print.

If, however, you select Yes a prompt will appear giving the fax number for the supplier on the order.



On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen. Once you know that the number remains, you will not have to make a note of the number in future.

Once the fax has been sent, you will be asked if you wish to mark the order as faxed. If you select Yes today's date will be entered in the *Printed* field on the Order and the order will not be faxed again when the orders are next printed in batch.


15. Entering medical notes

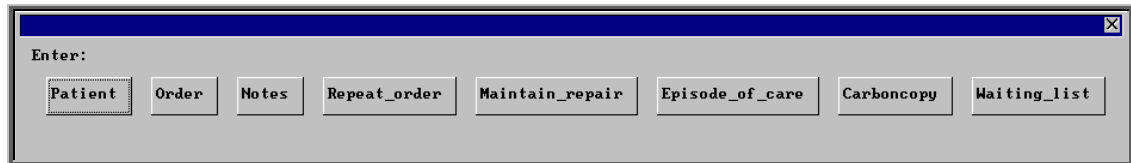
Medical notes can be added directly to the patient record, or, if a care-episode has been set up for the patient ([see Patients - Note 17. Adding a care episode](#)), notes can be attached to a specified episode of care.

Note: Medical notes cannot be deleted or amended (unless entered as a temporary note) so take care that the note you are adding is accurate and for the correct patient.

Menu: Patients

1. Adding a medical note to the patient

Find the patient that you wish to add a note and click on the 'enter' icon  (or Edit, Enter).



To select **Notes**, click on the **Notes** button with the mouse, or type **N**.

You will then be taken to the **Notes** screen where some of the fields will already be filled in for you.

Hospital No Hospital No and patient name will be brought through from the patient record.

Date Today's date will automatically be entered. You can overtype with another date if required.

Category Select a category from the pop-up list (Categories to appear in the pop-up should be set up in **Utilities – Choices – Note Categories**)

A category of 'dictionary' has already been set up for you. If you choose this category when adding a note you will be presented with a list of medical conditions (previously set up in **Utilities – Choices – Medical Conditions**) for you to choose from.

A category of 'video' has already been set up for you. Choose this category when attaching a video as a note.

A category of 'picture' has already been set up for you. Choose this category when attaching a photograph/picture as a note.

A category of 'temp' has already been set up for you. Choose this category if adding a note which you may need to edit.

Episode This field is by-passed. It is for use when adding a note to a care episode.

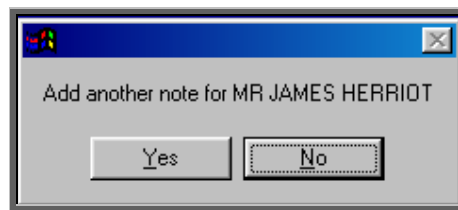
Note Adding a standard Note

When typing text for the notes, remember that the first line of the note is shown in the list of medical notes on the patient's screen, so consider making the first line a summary of the content of the note.

As you type the note and get to the end of the line, the text will scroll onto the next line automatically. There is no need to press **Enter** to go onto the next line, unless you wish to start a new line before the line you are on is full.

Having finished typing the note, check that you are happy with the content. **You cannot edit this note later unless it has been entered as a 'Temp' note.** If there is anything you wish to change, move the cursor with the arrow keys and change the text accordingly. If additional text is added in the body of the note the text will not scroll at the end of the line automatically as it did initially. However, by pressing **F7** the text will be realigned for you.

When you happy that the note is correct, press **Ctrl-Enter** to finish and save the record. You will be asked if you wish to add another note for the same patient.



Select **No** to return to the main patient screen, or **Yes** if you wish to add another note.

Adding a Note using the 'Video' category

In the *Note* field type the file name (including it's extension) and path of the video file you wish to attach as a note.

Adding a Note using the 'Picture' category

In the *Note* field type the file name (including it's extension) and path of the picture file you wish to attach as a note.

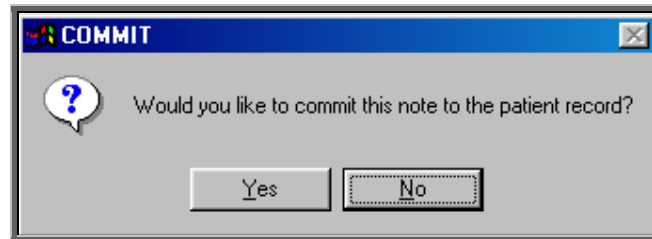
Adding a Note using the 'Temp' category

In the *Note* field press **Ctrl-Enter** or **F10** to be taken to the Text Editor. The patients name and hospital number will already be entered at the top of the text editor, so that if you choose to print the temporary note to be checked later you will know who the note belongs to. (You will want to take this out before you finally commit the note. This can be done quickly by positioning the cursor on the line you wish to delete and pressing **F8**.)

Type in the note, again remembering that the first line of the note is shown in the list of medical notes on the patient's screen, so consider making the first line a summary of the content of the note.

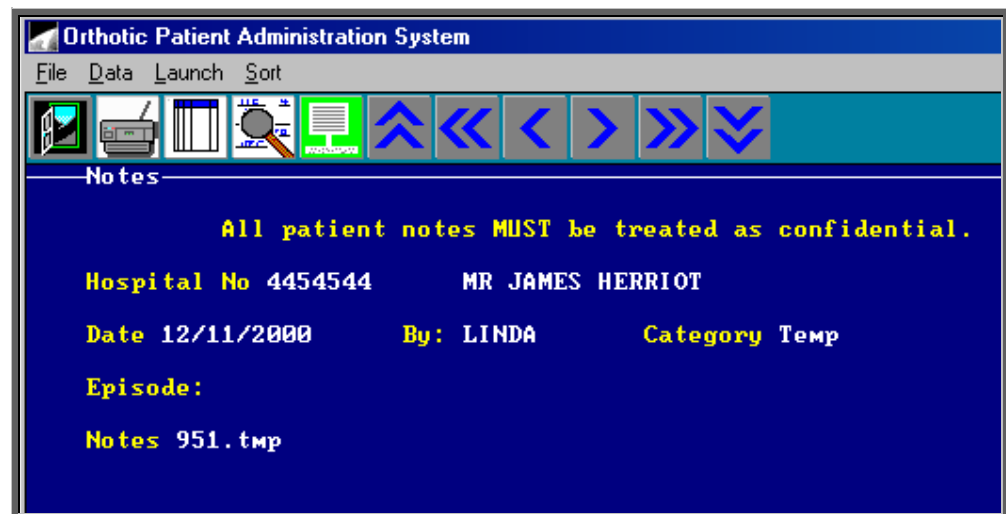
If you wish to print the temporary note press **Alt-P**

When the note is complete, press **F10** to exit the Text Editor, and you will be given the opportunity to commit the note.



If you select **Yes**, the text entered in the Text Editor will be copied into the Note field of the note and saved. **You will not be able to edit this note later.**


If you select **No**, the information typed in the Text Editor will be allocated a sequential temporary note number and this number will show in the *Note* field.



Editing a note entered with a 'Temp' category

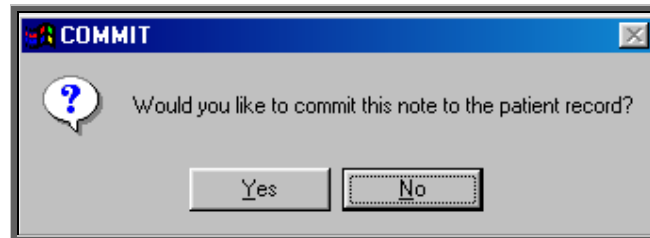
Find the note you wish to amend (by finding the patient record and

then clicking on the 'notes' icon  (or Goto, Notes). Use the

'arrow' icon  (or **F6**) to find the note you wish to edit).



Click on the 'launch' icon (or Launch) to be taken to the Text Editor. Edit the text accordingly. If you are intending to commit the note you will want to take out the patient's name and hospital number from the top of the text editor. This can be done quickly by positioning the cursor on the line you wish to delete and pressing **F8**.) Press **F10** when you have finished, to exit the Text Editor, and you will be given the opportunity to commit the note.



If you select **Yes**, the text entered in the Text Editor will be copied into the *Note* field of the note and saved. **You will not be able to edit this note again.**

If you select **No**, the changes will be saved against it's temporary note number, but the note can still be amended again later. The note will continue to be available for editing until you commit the note to the patient record (by selecting **Yes** to the above prompt).

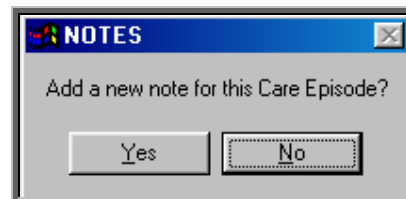
2. Adding a medical note to a care episode



Find the patient that you wish to add a note and click on the 'care episode' icon (or Goto, Care)



Find the care episode you wish to add a note and click on the 'enter' icon (or Edit, Enter)

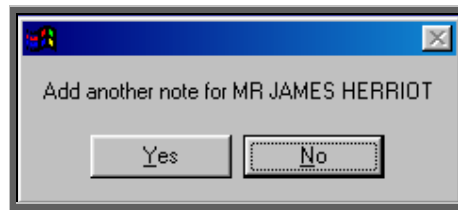


Select **Yes** to continue, or **No** to abandon adding a note.

You will then be taken to the **Notes** screen where some of the fields will already be filled in for you.

Hospital No Hospital No and patient name will be brought through from the patient record.

<i>Date</i>	Today's date will automatically be entered. You can overtype with another date if required.
<i>Category</i>	<p>Select a category from the pop-up list (Categories to appear in the pop-up should be set up in Utilities – Choices – Note Categories)</p> <p>A category of 'dictionary' has already been set up for you. If you choose this category when adding a note you will be presented with a list of medical conditions (previously set up in Utilities – Choices – Medical Conditions) for you to choose from.</p> <p>A category of 'video' has already been set up for you. Choose this category when attaching a video as a note.</p> <p>A category of 'picture' has already been set up for you. Choose this category when attaching a photograph/picture as a note.</p> <p>A category of 'temp' has already been set up for you. Choose this category if adding a note which you may need to edit.</p>
<i>Episode</i>	The care episode reference number will be brought through from the care episode record.
<i>Note</i>	<p>Adding a standard Note</p> <p>When typing text for the notes, remember that the first line of the note is shown in the list of medical notes on the patient's screen, so consider making the first line a summary of the content of the note.</p> <p>As you type the note and get to the end of the line, the text will scroll onto the next line automatically. There is no need to press Enter to go onto the next line, unless you wish to start a new line before the line you are on is full.</p> <p>Having finished typing the note, check that you are happy with the content. You cannot edit this note later unless it has been entered as a 'Temp' note. If there is anything you wish to change, move the cursor with the arrow keys and change the text accordingly. If additional text is added in the body of the note the text will not scroll at the end of the line automatically as it did initially. However, by pressing F7 the text will be realigned for you.</p> <p>When you happy that the note is correct, press Ctrl-Enter to finish and save the record. You will be asked if you wish to add another note for the same patient.</p>



Select **No** to return to the main patient screen, or **Yes** if you wish to add another note.

Adding a Note using the 'Video' category

In the *Note* field type the file name (including it's extension) and path of the video file you wish to attach as a note.

Adding a Note using the 'Picture' category

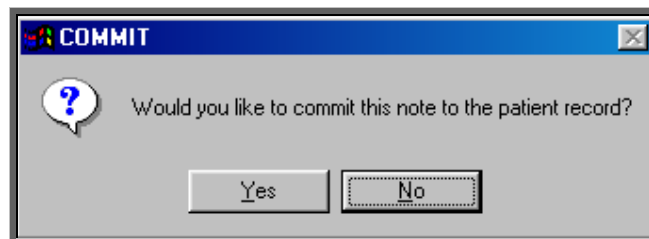
In the *Note* field type the file name (including it's extension) and path of the picture file you wish to attach as a note.

Adding a Note using the 'Temp' category

In the *Note* field press **Ctrl-Enter** or **F10** to be taken to the Text Editor. The patients name and hospital number will already be entered at the top of the text editor, so that if you choose to print the temporary note to be checked later you will know who the note belongs to. (You will want to take this out before you finally commit the note. This can be done quickly by positioning the cursor on the line you wish to delete and pressing **F8**.)

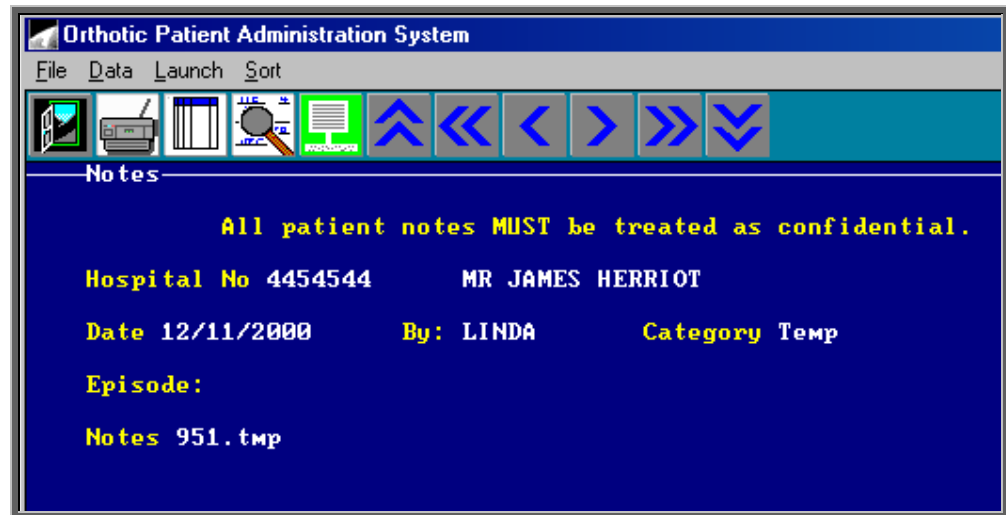
Type in the note, remembering that the first line of the note is shown in the table of medical notes on the patient's screen. Consider making the first line a summary of the content of the note.

If you wish to print the temporary note press **Alt-P**
When the note is complete, press **F10** to exit the Text Editor, and you will be given the opportunity to commit the note.






If you select **Yes**, the text entered in the Text Editor will be copied into the Note field of the note and saved. **You will not be able to edit this note later.**

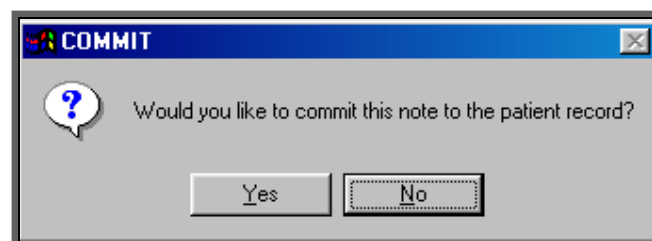
If you select **No**, the information typed in the Text Editor will be allocated a sequential temporary note number and this number will show in the *Note* field.



Editing a note entered with a 'Temp' category

Find the note you wish to amend (by finding the patient record, clicking on the 'notes' icon  (or Goto, Notes). Use the 'arrow' icon  (or **F6**) to find the note you wish to edit).

Click on the 'launch' icon  (or Launch) to be taken to the Text Editor. Edit the text accordingly. If you are intending to commit the note you will want to take out the patients name and hospital number from the top of the text editor. This can be done quickly by positioning the cursor on the line you wish to delete and pressing **F8**. Press **F10** when you have finished, to exit the Text Editor, and you will be given the opportunity to commit the note.



If you select **Yes**, the text entered in the Text Editor will be copied into the *Note* field of the note and saved. **You will not be able to edit this note again.**

If you select **No**, the changes will be saved against it's temporary note number, but the note can still be amended again later. The note will continue to be available for editing until you commit the note to the patient record (by selecting **Yes** to the above prompt).

16. Printing medical notes

Menu: **Patients**

1. Patient demographics

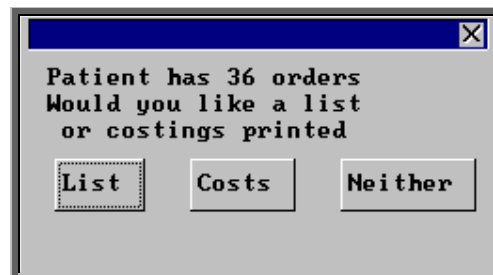


Click on the 'print' icon (or **File**, **Print**) and select **Patient Information**.

Patient demographics will then be printed, showing the patient's personal details and any notes that have been entered for them. This will include both general notes entered directly against the patient record and those entered against a care episode.

(N.B If you print the Patient demographics from the 'short' **Patient** screen then medical notes will not be included on the print out.)

From this option you will then be asked if you would like details of the patients orders.



List

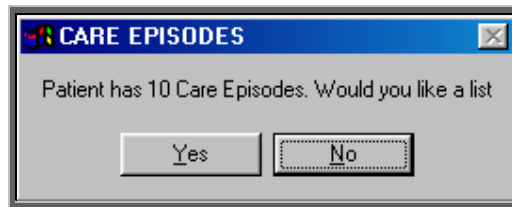
List prints a list of orders for that patient (Order number, Date of order and the general Description for that order).

Costs

Costs prints a more detailed list of orders for that patient (Order number, Date of order, the detailed Description for the first item on that order and total Cost of the order).

Select which orders report you require or select **Neither** if you do not require details of the patient's orders.

A box will then appear showing how many care episodes the patient has.





If you would like to print a list (showing Referral date, Assessment Date, Fitting date, Discharge date and Objectives for each episode), click on **Yes**. Otherwise select **No**.

2. Individual notes

a) General or care episode notes


Find the note you wish to print (by finding the patient and clicking on the 'notes'

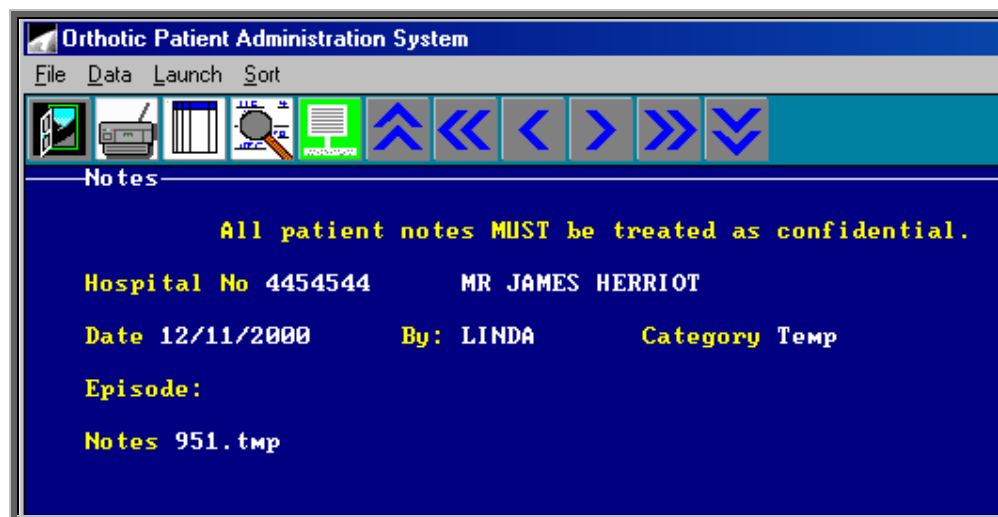
icon  (or Goto, Notes)).

Now click on the 'print' icon  (or File, Print).

b) temporary notes

Find the temporary note you wish to print (by finding the patient and clicking on

the 'notes' icon  (or Goto, Notes)).





Click on the 'launch' icon (or Launch) to be taken to the Text Editor.

Press **Alt-P** to print the text.

Press **F10** to exit the Text Editor, and you will be given the opportunity to commit the note.

If you select **Yes**, the text entered in the Text Editor will be copied into the *Note* field of the note and saved. **You will not then be able to edit this note later.**

17. Adding a care episode

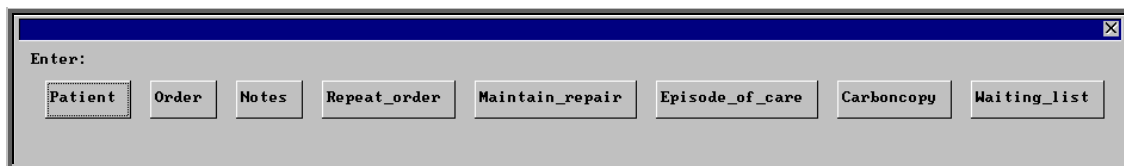
A care episode is a means of grouping together orders, notes and appointments that relate to a specific episode of care. Care episodes can also be used for tracking the pathway of the referral.

Menu: **Patients**

Find the patient that you wish to add a care episode for and click on the 'enter' icon



(or Edit, Enter).



To select **Episode_of_care**, click on the **Episode_of_care** button with the mouse, or type **E**.



Once you have confirmed that you wish to add a care episode for this patient you will be taken to the **Care Episode** screen where some of the fields will already be filled in for you.

Case

the next sequential number will automatically be entered in this field. You can overtype this as long as the case number you type is unique and has not been used before. This field cannot be left blank.

<i>Patient</i>	Hospital No and patient name will be brought through from the patient record.
<i>Objectives</i>	free text available to outline the objectives of this care episode. Once you have finished entering the objectives, press F4 to move to the next field.
<i>Referral</i>	date of referral. This will default to today's date, which can be changed or taken out by pressing F8 .
<i>Assessment</i>	date of assessment
<i>Fitting</i>	date of fitting
<i>Discharge</i>	date of discharge
<i>Referred</i>	select the diagnosis by the referrer from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Diagnosis)
<i>Diagnose</i>	select the diagnosis by the hospital from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Diagnosis)
<i>Consref</i>	select who made the referral to the department from the pop-up list
<i>Purchaser</i>	select the purchaser from the pop-up list
<i>Orthosis</i>	select an orthosis code from the pop-up list
<i>Primary Source</i>	select the original referrer of the patient from the pop-up list
<i>Primary Date</i>	enter the original referral date
<i>Primary Assessment</i>	enter the date of the assessment made by the original referrer
<i>Intervention Type</i>	select the intervention type from the pop-up list
<i>Clinician</i>	select a clinician from the pop-up list
<i>Initiator</i>	select an initiator from the pop-up list

It is unlikely that you will be able to complete all the fields when you first enter a care episode. Typically, the only information you will know initially is the objective and referral date.

When you have finished entering the information, press **Ctrl-Enter** to save and proceed.



18. Updating a care episode


As the episode of care progresses you will have additional information to enter in the care episode e.g. assessment or fitting date.

Menu: **Patients** or

Menu: **History – Care** (if you know the patient's hospital number)

Find the patient whose care episode you wish to update.

Click on the 'care episode' icon  (or Goto, Care). If the patient has more than one care episode, use the 'arrow' icon  (or **F6**) to find the care episode you wish to edit.

Click on the 'update' icon  (or Edit, Update) and you will be taken to the Objectives field.

To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change.



When you have finished updating the information, press **Ctrl-Enter** to save the changes, or **Esc** then **N** to abandon the changes.

Note: Care Episodes cannot be deleted.

19. Printing care episode details

Menu: **Patients**

Find the patient whose care episode you wish to print.

Click on the 'care episode' icon  (or Goto, Care). If the patient has more than one care episode, use the 'arrow' icon  (or **F6**) to find the care episode you wish to print.


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


This will print all the information relating to the care episode including a summary of the orders and the medical notes in full.

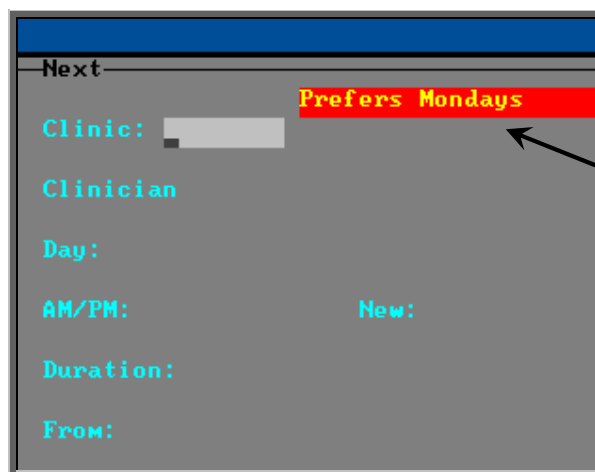
20. Making an appointment

Appointments can be made from the **Patient** screen. This is an alternative way of making an automatic appointment when there is not an order (e.g. assessment 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.



Contents of the *Comments* field on the main patient record are shown here in case they are relevant to the appointment 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

enter **Y** if the patient is new or **N** if the patient has been seen before. Instead of entering **N**, you could further classify the appointment by entering **S** for supply, **F** for fitting or **R** for review.

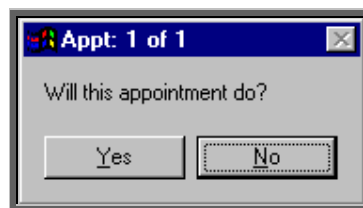
Duration

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 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.



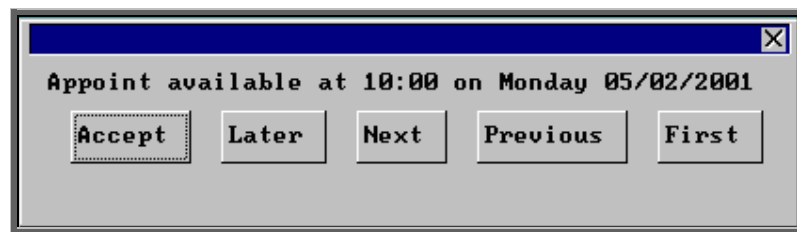
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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**).

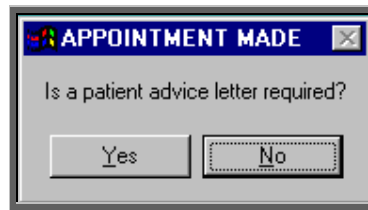
If you wish to abandon finding an appointment press **Esc**.

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](#))

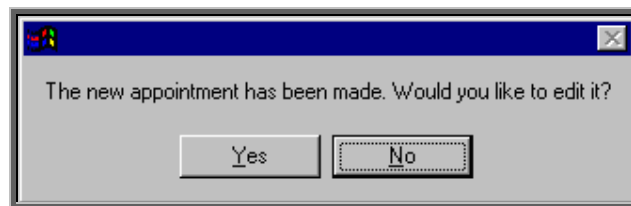
If the patient requires transport (i.e. the *Transport* field on the patient records is set to anything other than 'No Transport Required') you will be reminded that transport needs to be booked. Click on **OK** to continue.



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
- to enter booking information




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.


When you have finished editing, press **Ctrl-Enter** to save and return to the patient record.

21. 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.

1. **Patients.** Find the patient record and then click on the 'appointment' icon 
(or Appointments, Current)
2. **Appointments – Current – Sessions.** Go to the session the appointment is for and select Appointments, Maintain.
3. **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, Udate).

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

Referrer

New

Purchaser

Full and Partial

Letter

Type

Notes

Comments

Event

Care Episode

Order

Outcome

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

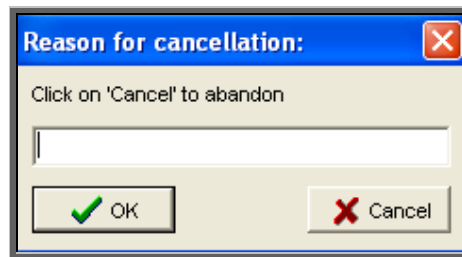
(entering a date in here will stop a reminder letter being printed – taking the date out will enable the letter to be printed again)

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.

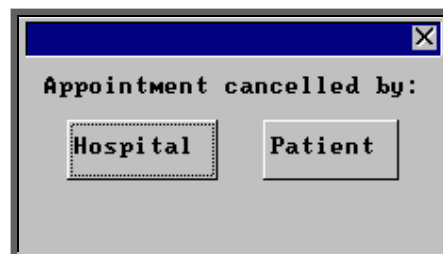
22. Cancelling an appointment

Menu: **Patients**

Find the patient record and then click on the 'appointment' icon  (or Appointments, Current). Having found the appointment you wish to cancel, click on the 'cancel' icon  (or Cancel).



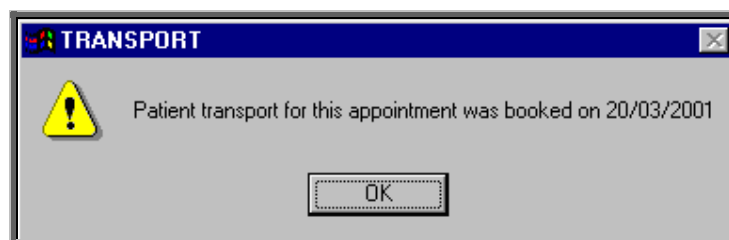
Enter the reason for the cancellation and click on OK. If you wish to abort the cancellation click on **Cancel**.



Select whether the **Hospital** or the **Patient** was responsible for the cancellation.

The appointment will be cancelled and the allocated time made available so that it can be offered to other patients.

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



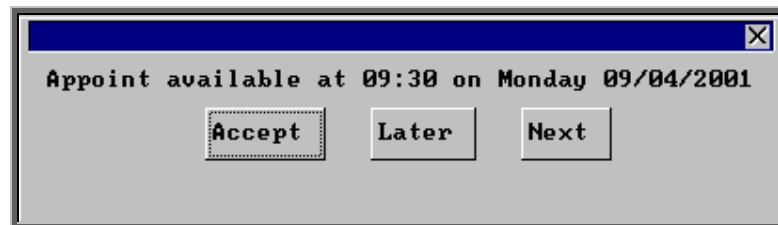
Warning. Cancelled appointments cannot be un-cancelled. If an appointment is cancelled be mistake you will need to make the appointment again.

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 original 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.



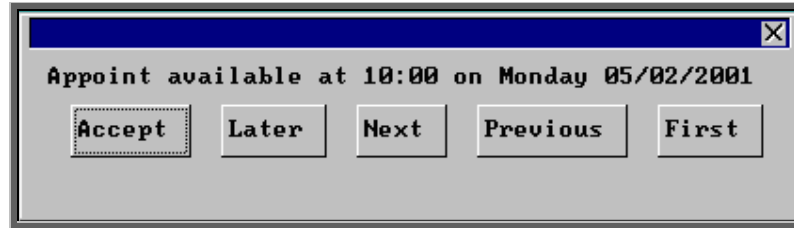
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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**).

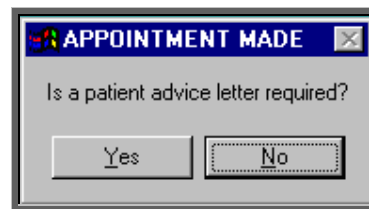
If you wish to abandon finding an appointment press **Esc**.

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.

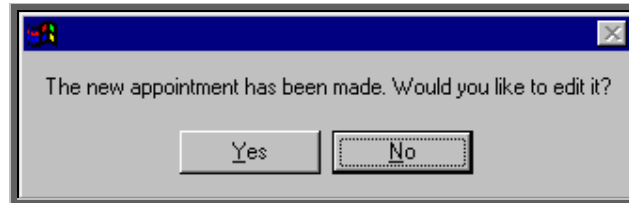


If you are using the Transport memo available in OPAS, they are also printed in batch (see [Appointments - Note 15. Printing appointment letters](#) and [Appointments - Note 16. Printing transport memos](#)).

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 change the reason for the appointment from the default entry
- to add additional information in the comments field
- to enter booking information



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.

When you have finished editing, press **Ctrl-Enter** to save and return to the appointment you have just cancelled.

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.

Outcome	Could Not Attend
Created:	03/11/2003 By: LINDA
Deleted:	03/11/2003 By: LINDA
Reason:	Patient ill

When the appointment is cancelled due to the patient, an *Outcome* of 'Could Not Attend' is automatically entered. When the appointment is cancelled due to the hospital, an *Outcome* of 'Cancelled by Hospital' is automatically entered.

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 the appointment can still be seen when maintaining the session. 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. Also, regardless of the setting of the parameter, cancelled appointments will be transferred to the Archive so that statistical information can be produced for cancelled appointments.

23. Waiting List

The waiting list enables you to keep a track of those patients that are waiting for their initial or review appointment to be offered.



a) Setting up the waiting list categories

Menu: **Utilities – Choices – Wait Types.**

Wait types are used to identify the urgency of the patient waiting to be seen. We have set up three **Wait Types** to get you started.

Type	Weighting
Urgent	5
Soon	3
Routine	1

Each **Wait Type** has a weighting assigned to it, which is used to calculate the score given to a patient on the waiting list. This works by multiplying the weighting of the **Wait Type** by the number of days the patient has been on the waiting list. e.g. someone who has been on the waiting list 10 days and are classed as **Urgent** will have a score of 50 (10 x 5) whereas someone who has been on the waiting list 10 days and are classed as **Routine** will only have a score of 10 (10 x 1)

These, however, can be amended by clicking on the 'update' icon  (or **E**dit, **U**pdate), or additional **Wait Types** can be added by clicking on the 'enter' icon  (or **E**dit, **E**nter) and entering the type and its appropriate weighting.

The order that you enter the types here will be the order they initially appear in the drop down selection when adding a patient to the waiting list, so you may wish to enter them in priority order.

b) Adding patients to the waiting list

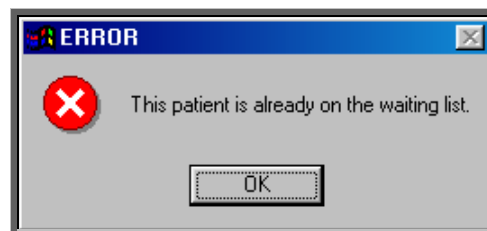
Menu: **Patients**

Find the patient that you wish to add to the waiting list.

Click on the 'enter' icon  (or **E**dit, **E**nter).

Click on **Waiting List** (or press **W**).

If you try to add a patient who is already on the waiting list, you will get the following message.



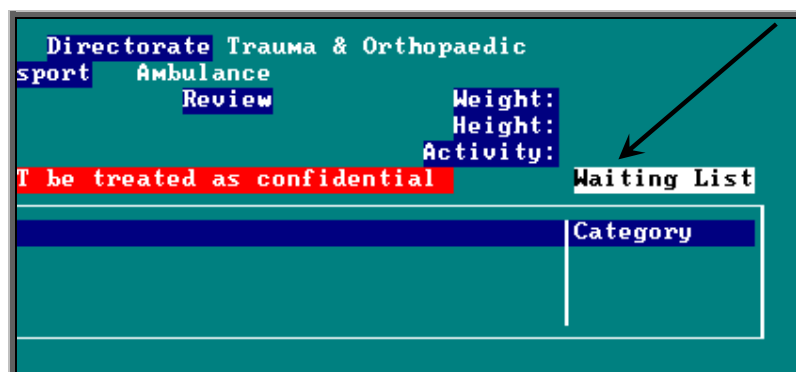
Otherwise you will be taken to the waiting list screen.

Type: select from the list provided (as set up in (a)) by highlighting the required type and pressing the **Enter** key or by double clicking on it with the mouse.

For: gives you the opportunity to say (in 30 characters) why the patient needs to be seen.

Orthosis Code select the appropriate orthosis code from the pop-up list

When a patient has been added to the waiting list a flag will appear on the patient record to show that they are on the waiting list. This flag will disappear once they have been removed from the list.



c) Accessing the waiting list information

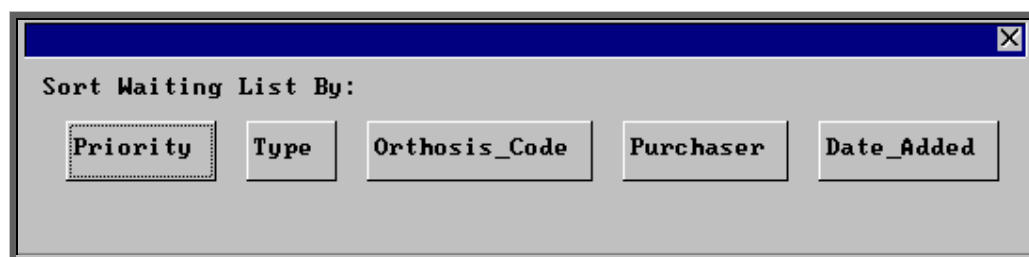
i) Menu: Patients

If you are looking at a patient record and can see that they are on the waiting list, click on Goto at the top of the patient screen and select Waiting List.

ii) Menu: Appointments – Current – Waiting List

From here you can see all those patients that are still on the waiting list.

When entering the **Waiting List** screen, you will be asked the order the patients should be displayed in.




Priority


Each patient has a *Priority* 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 (in **Utilities – Choices – Wait Types**).



The patients will be shown in order of *Priority* with the highest *Priority* first. Therefore, the first person you will see on entering the screen will be the patient with the highest *Priority* score.

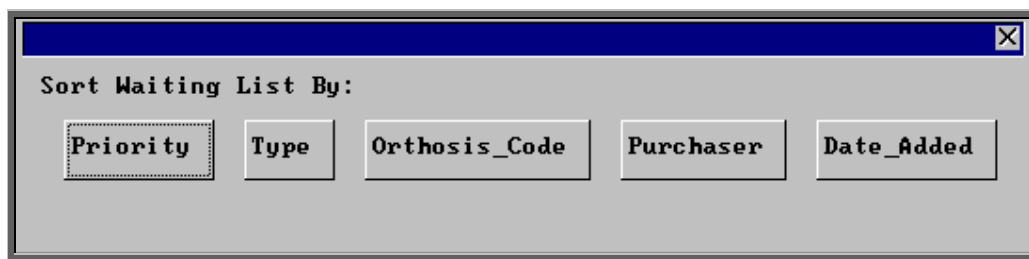
- | | |
|---------------|---|
| Type | The patients will be shown with the Urgent entries first, then the Soon's and then the Routine's . Within the types they will be in <i>Priority</i> value. Therefore, the first person you will see on entering the screen will be the most urgent Urgent ! |
| Orthosis Code | The patients will be shown in Orthosis Code order. This will enable you to see if there is a specific type of appliance that patients are waiting for. |
| Purchaser | The patients will be shown in Purchaser order. This is particularly useful where more than one hospital is using the Waiting List. |
| Date Added | The patients will be shown in order of the date they were added to the Waiting List. The patient that has been on the Waiting List longest will be shown first. |

To see the patients as a list, click on the 'browse' icon  (or Data, Browse).

Orthotic Patient Administration System					
File Edit Appoint Data					
					
Added:	By:	Hospital No	Type:	For:	Priority
12/02/2001	LINDA	776655	Urgent	SHOES	80
23/02/2001	LINDA	TEMP000007	Urgent	SHOES	25
22/02/2001	LINDA	LKP12345	Routine	hospital appt after 30/4	18

d) Printing the waiting list

Menu: Appointments – Current – Waiting List



Select the order you wish the Waiting List to be printed (see note c) above)



Click on the 'print' icon (or File, Print) and select **Custom Report**.

Click on This_view at the top of the screen.

Highlight WAITLIST.

Click on Run at the top of the screen.

A print box will appear in the centre of the screen showing you how many copies will be produced. One copy will be printed unless you change the number of copies in the last box. If you want to continue, click on OK.

e) Maintaining the current waiting list

Go to the **Waiting List** screen using either method explained in note c) above.

i) Editing the Waiting List

If you wish to change the *Type*, *For* or *Orthosis Code* allocated to the



patient, click on the 'update' icon (or Edit, Update). To change the *Type* or *Orthosis Code* press the **Tab** key to see the list of available options. Press **Ctrl-Enter** to save the changes made.

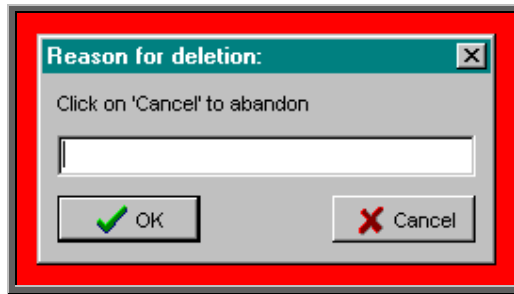
ii) Deleting patients from the Waiting List

Patients are automatically removed from the Waiting List when they are given an appointment (see note f) below), but there are occasions when patients need to be removed manually.

If you wish to remove a patient from the waiting list without making an



appointment then click on the 'delete' icon (or Edit, Delete).

A dialog box titled "Reason for deletion:" with a close button (X) in the top right corner. Below the title bar, it says "Click on 'Cancel' to abandon". There is a text input field below this. At the bottom, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.



Enter the reason for the cancellation (up to 35 characters)

Who cancelled the entry and the reason why will then be shown on the waiting list entry.

A red rectangular box with a black border. Inside, the text "Reason: LINDA - Patient has moved away from area" is displayed in a monospaced font.

Once a patient has been removed from the Waiting List the **Waiting List** message will be removed from the **Patient** screen. The information regarding their waiting list entry can still be viewed by going into **Appointments – Archived – Waiting List**.

f) Making appointments

- from within the **Waiting List** screen click on the 'clock' icon  (or **A**ppoint)
- or • from within the **Patient** screen click on the 'clock' icon  (or **A**ppointments, **N**ext)

(see **Appointments - Note 11. Allocating appointments automatically (via waiting list)** and **Appointments - Note 10. Allocating appointments automatically (via patient record)**)

Either of these two methods will result in the *Removed* and *Reason* field to be completed and the patient therefore being removed from the waiting list. The *Removed* field shows the date of the appointment, not the date it was removed.

A red rectangular box with a black border. Inside, there are two lines of text: "Removed: 06/11/2000" and "Reason: appoint".

N.B. Appointments made from an **Order** screen or manually in the **Session** screen will not remove a patient from the waiting list.

Once a patient has been removed from the Waiting List the **Waiting List** message will be removed from the **Patient** screen. The information regarding their waiting list entry can still be viewed by going into **Appointments – Archived – Waiting List**.


24. Carbon Copy


Carbon Copy gives you the ability to send copies of the appointment letter internally to individuals who need to be notified of the appointment (e.g. a physiotherapist involved with the patient's care, or an interpreter who needs to be in attendance), by adding them as a contact on the **Patient** record.

The following steps should be followed:

a) Setting up the contacts who may need to be copied on a letter

Menu: **Utilities – Choices – Contacts**.

To add a new **Contact** click on the 'enter' icon  (or **E**dit, **E**nter)

To update an existing **Contact**, find the **Contact** you wish to change and click on the 'update' icon  (or **E**dit, **U**ppdate).

<i>Reference</i>	<i>Reference</i> is entered automatically
<i>Name</i>	enter the contacts name
<i>Position</i>	enter their position/job title e.g. Physiotherapist
<i>Location</i>	enter the department where they work e.g. Rehabilitation
<i>Add1</i>	4 additional address lines are available for those contacts that are external
<i>Add2</i>	
<i>Add3</i>	
<i>Add4</i>	

Press **Ctrl-Enter** when you have finished entering the names you require. You can come back to this screen at any time to add additional names as they arise.

b) Adding contacts to the patient record

Menu: **Patients**

Find the relevant patient.

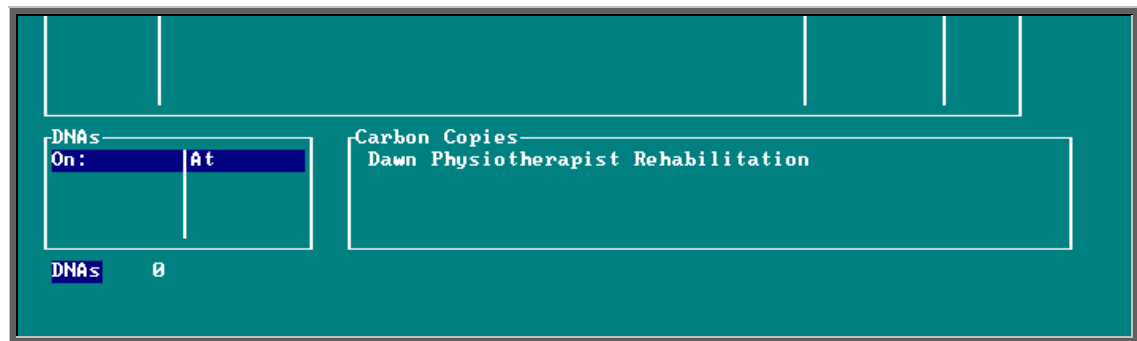
Click on the 'enter' icon  (or **E**dit, **E**nter)

Click on Carboncopy (or type **C**)

You will be shown the names you have previously set up in **Utilities – Choices – Contacts**. Highlight the name required and press **Enter** (or double click with the mouse on the required name).

You will then be asked if you wish to add another carbon copy recipient. If you do, click on **Yes** and continue as above. Once you have added all the recipients you wish to, then select **No** and you will return to the **Patient** screen.

To see which names have been added to a patient, page down the screen where you will find a **Carbon Copies** table underneath **Prescriptions**.



The screenshot shows a patient record screen with a teal background. On the left, there is a section labeled 'DNAs' with a table containing one row: 'On: At'. Below this, it says 'DNAs 0'. To the right, there is a section labeled 'Carbon Copies' with a table containing one row: 'Dawn Physiotherapist Rehabilitation'.

This table is only a summary and will only show up to three names. If you believe there may be more names that you wish to see then press **Alt-T** to see a list of tables available and select **Carbon_Copies**.

Tables					
Medical_Notes	Orders	Appointments	Prescriptions	DNAs	⇒ Carbon_Copies
Addresses					

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.

c) Deleting contacts from a patient record

Menu: **Patients**

Find the relevant patient.

Click on **Goto - Copies** at the top of the patient screen to look at the contents of the Carbon Copy table. If there is more than one contact assigned to the patient,

use the 'arrow' icon  (or **F6**) to find the contact you wish to delete. Then click on the 'delete' icon  (or **Edit, Delete**).

d) Adding the Carbon Copy field to your appointment letters

Menu: **Utilities – Choices – Letters.**

Find the appointment letter(s) that you use by paging down the list of letters. (Most of you will be using LETTERA) Note: the list is in alphabetical order of *Short Name*.

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



(or **WP**) to see the letter. Then click on the 'four coloured squares' icon



(or **Wordprocessor**) to be able to edit the letter.

Move to the bottom of the letter using the arrow keys or page down, and add the carbon copy field as follows.


CC {{+cc}}	(will give you the contact name)
CC {{+cc}}- {{pos}}	(will give you the contact name and position)
CC {{+cc}}- {{pos}} - {{loc}}	(will give you the contact name, position and location)
CC {{+cc}}- {{pos}} - {{loc}} {{+ccadd1:}} {{+ccadd2:}} {{+ccadd3:}} {{+ccadd4:}}	(will give you the contact name, position, location and address details)

To type the opening squiggly brackets press **Ctrl-J**.

To type the closing squiggly brackets press **Ctrl-K**.

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.

When you print your appointment letters, having gone through the steps above, additional copies of the letter will automatically be printed for each carbon copy recipient, with their name printed at the foot of the copy that is for them. i.e. if a patient has 2 carbon copy recipients on his patient record (e.g. Dr Smith and Nurse Jones) then when appointment letters are printed you will get one copy as usual for the patient, one copy with CC Dr Smith at the foot of the letter and another copy with CC Nurse Jones at the foot of the letter.

This functionality will also apply to DNA letters if you apply step (d) to your DNA letters.

25. This

Menu: **Patients**

There are occasions when you would want to send a preset letter to just one patient. Clicking on the word This above the icons isolates the patient that you are looking at, so that when you run mail merge the letter will only be produced for 'this' patient.

N.B. To get all your patient records back when you have finished, click on the 'ABC' icon

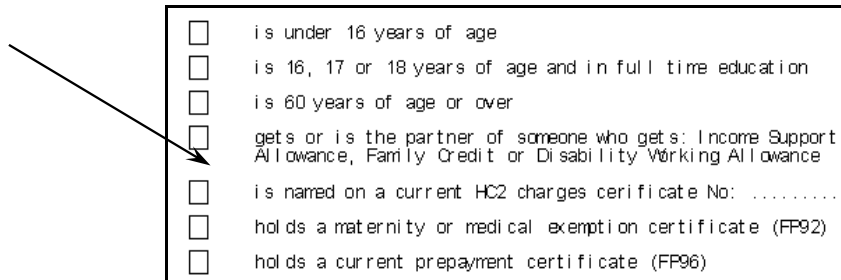


(or Sort) and select **Physical**.

26. Printing HSA5/WF1 Forms

HSA5 (Supply of Drugs and Elastic Hosiery to NHS Hospital Outpatients) and WF1 (Supply of Wigs and Fabric Supports to NHS Hospital Outpatients) forms can be printed from OPAS automatically inserting the patient's details.

In order for the form to be able to print the tick boxes on the form you need a font called



<input type="checkbox"/>	is under 16 years of age
<input type="checkbox"/>	is 16, 17 or 18 years of age and in full time education
<input type="checkbox"/>	is 60 years of age or over
<input type="checkbox"/>	gets or is the partner of someone who gets: Income Support, Allowance, Family Credit or Disability Working Allowance
<input type="checkbox"/>	is named on a current HC2 charges certificate No:
<input type="checkbox"/>	holds a maternity or medical exemption certificate (FP92)
<input type="checkbox"/>	holds a current prepayment certificate (FP96)

Webdings. If you print the form and get a 'c' where you would expect to see the box, then you have not currently got Webdings on your computer.


In case you haven't, we have included the font in OPAS and it can be found in q:\opas\font\webdings.ttf. Ask your IT department to copy the font into the location that fonts are held on your computer.

Printing the forms

Menu: **Patients**

Find the patient you wish to produce a HSA5 or WF1 form for.

Click on This at the top of the screen to isolate that patient record.

Click on the 'print' icon  (or File, Print)

Select **Mail Merge** from the print menu

Click on This View at the top of the screen

Highlight the form you wish to produce. The HSA5 form will appear at the top of the list, and the WF1 form at the bottom, as the list is in alphabetical order.

Click on Run



You will be informed how many patient records are about to be merged with the form.


If you have forgotten to isolate the patient first and it is telling you that you are about to merge will all your patient records, then this is your opportunity to Cancel from the option. Otherwise click on Ok to continue.



When you are asked if you would like to edit the document, click on No.

Warning: If you edit the document here, it will permanently change the form for future use.

A print box will then appear which will give you the opportunity to change the number of copies you wish to print from 1 if necessary. Click on OK to continue.

Once you have completed the merge you will be taken back to the patient record. To be able to see all the patient records again click on the 'ABC' icon  (or Sort) and select Physical.

The forms are simply preset letters that have been designed to look like the relevant form, and therefore if you wish to edit them you can.

a) Editing the HSA5 form

Menu: Utilities – Choices – Letters

Find HSA5. Note: the list is in alphabetical order by *Short Name*.

Once you have highlighted the HSA5 letter click on the 'paper and pencil' icon



(or WP) to see the letter. Then click on the 'four coloured squares' icon




(or Wordprocessor) to be able to edit the letter.

For full details on editing letters [see Utilities - Note 23. Choices - Letters](#).

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, choose No.

b) Editing the WF1 form

Menu: **Utilities – Choices – Letters**

Find WF1. Note: the list is in alphabetical order by *Short Name*.

Once you have highlighted the WF1 letter click on the 'paper and pencil' icon



(or WP) to see the letter. Then click on the 'four coloured squares' icon




(or Wordprocessor) to be able to edit the letter.

For full details on editing letters [see Utilities - Note 23. Choices - Letters](#).


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, choose No.


27. Paslink

If the hospital has bought some additional software from Wynnldodge Limited called Paslink, this option can be used for downloading patient information from the main hospital


database. The option can be selected by clicking on the 'paslink' icon  (or Paslink). As hospital databases vary, the instructions for using Paslink are site specific and individual instructions will be provided to those hospitals using this.

28. GP

Menu: **Patients**

By clicking on the 'GP' icon  (or Goto, GP) you will be taken to a screen which will show the full details of the GP that has been entered on the patient's record that you are looking at. This will include information about which Practice he works at and which PCG the Practice belongs to.

While you are in the GP screen, you have the ability to send a preset letter (26 different GP letters can be set up – [see Utilities - Note 23. Choices - Letters](#)) to the GP regarding the patient whose record you are in. To do this,

Click on the 'print' icon  (or File, Print)

Select **Mail Merge** from the print menu

Click on This View at the top of the screen

Highlight the GPLET you wish to use

Click on Run



You will be informed how many GP records are about to be merged with the letter. As only one GP can be entered on a patient's record, this will always be '1'.

Click on Ok to continue.

When you are asked if you would like to edit the document click on No unless you are sure that you do. **Warning: If you edit the document here, it will permanently change the letter for future use.**

A print box will then appear which will give you the opportunity to change the number of copies you wish to print from 1 if necessary. Click on OK to continue.

29. Mobility

If you wish to use OPAS to keep track of wheelchairs, contact Wynnlogde for more details of this option.

30. Dormant patients


Menu: Patients

The Dormant option is a facility to find patients that have not had any orders for a while. It will look for all the patients that have had orders where the last order was earlier than the dormant period, and those who have never had an order and the patient was entered onto OPAS before the dormant period.

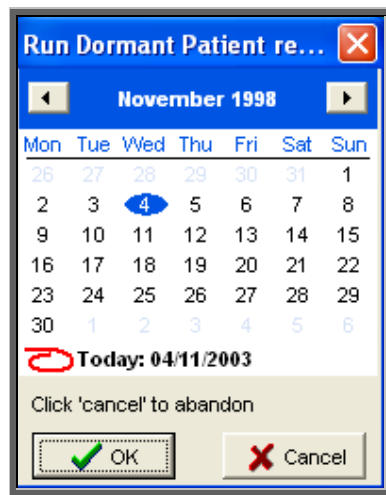
e.g. If your dormant period is set to 3 years and you run dormant patients on the 1 September 2000 it will find all the patients whose last order was before 1 Sep 1997 **and** those patients that were entered (and therefore have a registered date) before 1 Sep 1997 that have had no orders at all.

Within the system parameters you can show the number of years you classify as a dormant period. (When OPAS is installed this is set to 5 years but you can change this by going into **Utilities – Choices – System** ([see Utilities - Note 37. Choices - System](#)))

The dormant patients option should be run regularly (e.g. annually), once you have been using OPAS for several years, in order to clear out old patients.

To run the Dormant option click on the 'dormant patients' icon  (or Dormant).

A calendar in the middle of the screen will inform you of the start date of your dormant period.



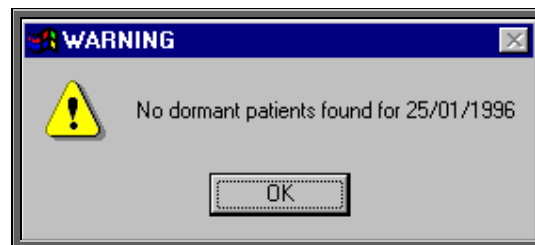
To abandon the Dormant option click on Cancel

If you wish to change the start date, overtype with an alternate date. However, if you change the date to a more recent date, you will be shown which patients fall into that criteria but you will not have the ability to mark those patients found for archiving.

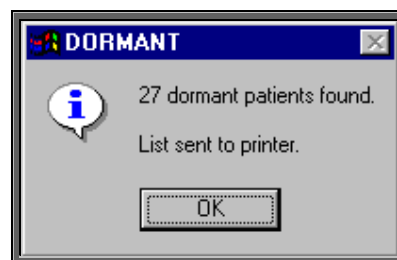
Click on OK.

One of three possible outcomes will then occur.

1. If all your patients have had orders within the dormant period the following message will appear.

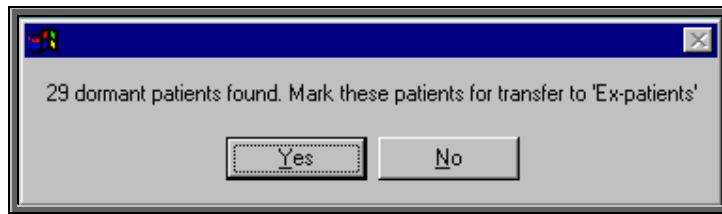


2. If you overtype the start date and patients are found that have not had orders between then and today, a list of these patients will be printed.

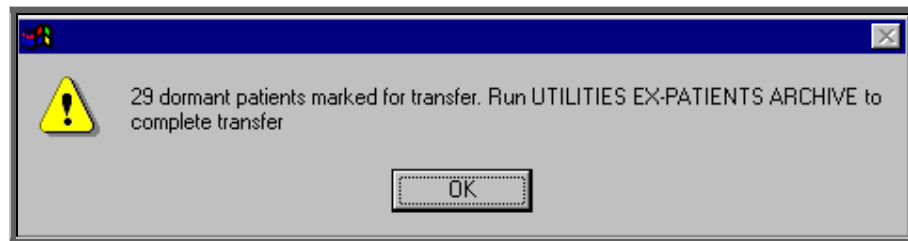




3. If you leave the start date as the true dormant period and patients that have not had orders in that period are found, a list will be printed, and you will be asked if you

wish to mark the patients found for transfer to **Ex-Patients**. (It does this by marking the patient record as deleted)



- Look at the report produced and decide whether you would like them all to be marked for transfer.
- If you do, then click on the **Yes** button (or type **Y**) and those patients will be marked as deleted.



- If you would like to transfer the majority of them, then click on the **Yes** button (or type **Y**) and then undelete those patients you do not want to transfer by clicking on the 'delete' icon  (or **E**dit, **D**elete) for each patient you do not wish to transfer.
- If you would like to transfer just some of the patients listed, then click on the **No** button (or type **N**). Then mark those patients you do want to transfer by clicking on the 'delete' icon  (or **E**dit, **D**elete) for each patient you wish to transfer.

To move the deleted patients from the active **Patient** area to **Ex-Patients** you need to run **Utilities - Ex-Patients - Archive**.

Note: Depending on the size of your patient database and the speed of your network, this may take quite a considerable time to run. You may wish to set this running overnight, but if you do, please ensure that the PC doing the archive will not get switched off accidentally. It is strongly advised that you take a back up before running this option and you **MUST** be the only person logged on to OPAS.

See **Utilities - Note 44. Ex-patients** for more details on Ex-Patients and archiving.

Orders

1. **Introduction**
2. **Adding an order**
3. **Adding a repeat order**
4. **Amending an order**
5. **Printing/Faxing orders in batch**
6. **Re-printing a batch of orders**
7. **Printing orders as they are raised**
8. **Re-printing individual orders**
9. **Re-faxing individual orders**
10. **E-mailing orders**
11. **Deleting an order**
12. **Receiving an order**
13. **Returning goods**
14. **Supplying an order**
15. **Progress**
16. **Jump to functions**

- 17. Deceased patients**
- 18. Archiving old orders**
- 19. Detail**
- 20. Reports – Adhoc**
- 21. Reports – Batches**

1. Introduction


Official orders can be raised on OPAS for the purpose of purchasing orthotic items for your patients. Once raised, these can be printed for sending to suppliers or can be faxed or e-mailed directly to your suppliers from OPAS (if you have the necessary fax hardware/software installed).

Throughout OPAS you will see Orders being referred to as History. This is because the details of the orders, which can be seen on the patient record, are providing a history of that patients past and current care.

Once an order has been raised you are able to track its progress by recording further information e.g. when the goods were received, when the goods were supplied to the patient and when the invoice for the items have been passed to Finance for payment.

It is these orders that will provide the information for producing a variety of management reports available within OPAS. The reports will only be as good as the data that has been entered, so the more information that is entered the more information you will be able to retrieve.

The following chapter will explain the options available from the **History** option on the main menu. However, it needs to be pointed out that there are actually two ways of finding an order.

1. using **Patients – Goto, History, Current**: firstly find the patient, then click on the ‘order’ icon  (or **Goto, History, Current**) to go to the orders for that patient
1. using **History – Orders**: find the order.

So if you know the order number, it is quicker to use **History - Orders**; if you only know the patient name, it is quicker to use **Patients – Goto, History, Current**.

When updating an order it does not matter which way is used to find it. You will find which way is quickest/easiest as you become more familiar with using OPAS.


2. Adding an Order


Menu: **Patients**

Although most of the order maintenance is carried out in **History**, new orders can only be entered from the **Patients** screen.


To add an order, find the patient that you want to add the order for.


If you are not using prescriptions move onto step 2

If you are using prescriptions you will then have to select which prescription this order is going to be assigned to. To do this, press the 'arrow' icon  (or **PgDn**) so that you can see the prescription table. Select the relevant prescription by clicking on it with the mouse so that the green highlight appears. (Alternatively press **Alt-T**, select Prescription and move down the list with the arrow keys.) Prescriptions are highlighted in red if they have expired. You cannot add an order to a Prescription if it has expired.




No:	Desc:	From:	For:
1	Test prescription for Fred	20/04/1995	2
2	Custom shoes	01/02/1998	5
3	TEST	02/09/1999	5

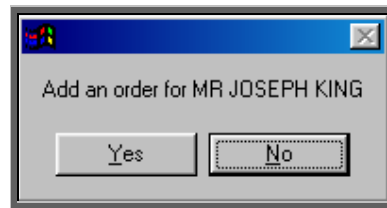
Click on the 'enter' icon  (or **Edit**, **Enter**) and the box below will appear.



Enter:

To select Order, click on the Order button with the mouse, or type **O**.

Note: If Order is not an available option you are in the 'short' **Patient** screen. To change back to the 'long' **Patient** screen, click on the 'swap' icon  (or **File**, **Swap**)



You are asked to confirm that you wish to add an order for this patient. If you have forgotten to find the patient before trying to add an order, this is your opportunity to abandon entering an order.

If you select **Yes** a new order will appear on the screen for you to complete.

Some of the fields will already be filled in for you. The fields below in red **must** be completed. The other fields are optional.

<i>Hospital No</i>	Hospital No will be brought through from the patient record.
<i>Patient</i>	Patient name will be brought through from the patient record.
<i>Sex</i>	(M)ale or (F)emale will be brought through from the patient record.
<i>DOB</i>	DOB will be brought through from the patient record.
<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Date of Order</i>	Today's date will automatically be entered. You can overwrite with another date if required.
<i>Order Number</i>	The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities - Note 49. Order numbers). You can overwrite this as long as the order number you type is unique (i.e. has not been used before and is unlikely to be automatically offered on a future order).
<i>Supplier</i>	Select the supplier you are ordering the goods from. (If the supplier does not appear in the pop-up list they will need to be added in Utilities – NSI – Suppliers.)
<i>Cross Ref or Hsp Order No</i>	This is an optional field where you may wish to quote a supplier's reference number or an internal reference number.
<i>Description</i>	50 characters available to describe in simple words what the order is for. This description will appear in appointment letters so should be terminology understood by the patient. As well as being able to free type in this field you can also select a description from a pop-up list by pressing the Tab key. (Standard descriptions to appear in the pop-up should be set up in Utilities – Choices – Descriptions)

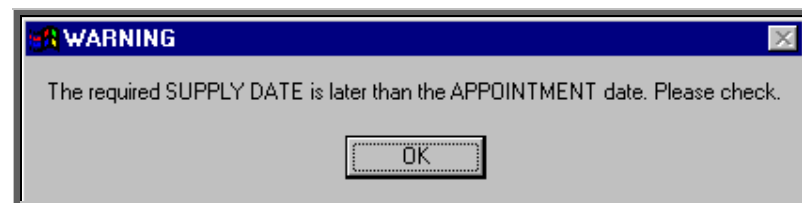
<i>Orthosis Code</i>	This is a mandatory field. You must select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes)
<i>Referrer</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>In-patient</i>	Type N for No or Y for Yes.
<i>Paid</i>	If the patient has to pay for the goods, (e.g. the orthosis incurs a prescription charge) the date they pay can be entered here in the format ddmmyyyy. To leave this field blank press the Enter key.
<i>Receipt</i>	If the patient has to pay for the goods, the receipt number can be entered here.
<i>Amount</i>	If the patient has to pay for the goods, the amount they paid can be entered here.
<i>Expected Supply Date</i>	This date will be calculated from the Orthosis Code that was entered above. When the Orthosis codes are set up there is the opportunity to say how long that type of item takes to be delivered. If an Orthosis Code has been set up with a delivery of 7 days, the <i>Expected Supply Date</i> will show as 7 days from today's date. If the delivery field is not used when the Orthosis Code is set up, the <i>Expected Supply Date</i> will show as today's date. The date that appears can be overtyped with another date if required.
<i>ACO</i>	<p>What you enter here will determine what OPAS will do when you book the goods in as being received.</p> <p>A if the order will need an appointment to be made for fitting. When the order is received from the supplier, the system will automatically make an appointment.</p> <p>C if the order is to be collected but does not need an appointment: when the order is received from the supplier, the system will generate a collection letter to advise the patient that the order is ready for collection.</p> <p>E if the order will be fitted during an existing appointment for that patient. The system will check the existing appointments for the patient and link the appointment to the order by automatically entering the order details onto the appointment and inserting the date of the existing appointment into the <i>Appointment</i> field on the order. If the patient has more than one future appointment you will be asked to select which appointment you wish to link the order with.</p>

Appt	Date:	Time:	clinic:	orth:
1	22/10/2003	10:00	Appliance Department	Mrs Ortho
2	23/10/2003	09:15	Appliance Department	Mr Ortho

Select appointment

1
2

OPAS will also check that the appointment date is after the expected supply date on the order. If it is not, you will get the following message:



T if the order needs to be taken to a ward. The information will appear at the bottom of the next clinic and can appear on the clinic list if required.

O for any other circumstance: the system will not take any particular action when the order is received.

Time If you enter **A** in the *ACO* field, you must indicate how long an appointment the patient will need. The default length of your appointments (as set in **Utilities – Choices – System**) will automatically appear in the *Time* field but this can be overtyped.

Clinic If you enter **A** or **C** in the *ACO* field, you must say which clinic venue they need to attend or collect the goods from. A pop-up list will give you your available options. (Clinic venues to appear in the pop-up should be set up in **Appointments - Venues**)

Clinician If you enter **A** in the *ACO* field, you can state which Clinician they need to see. If the patient can see any Clinician then leave this field blank. If you have entered a Clinician on the Patient record, this will show through onto the order. If you need to add/edit the Clinician, press the **Tab** key to see the list of options.

Day If necessary, a day of the week can be specified for the appointment. Press the **Tab** key to see the list of options. If you enter a day here,

when the goods are booked in and OPAS finds the next available appointment, it will only look for available appointments on that day. Therefore, care should be taken that you do not enter a mismatch here i.e. by saying that they need to see Mr Clinician on a Monday when Mr Clinician only has a clinic on Fridays.

Letter If you enter **A** in the *ACO* field, you can state which letter type will be required for the appointment when it is made. The field will default to your standard appointment letter (as set in **Utilities – Users**), but can be overtyped with a different letter type.

Transport If you enter **A** in the *ACO* field, you can state which type of transport the patient needs, if any. If you have entered Transport details on the Patient record, this will show through onto the order.

Prescription No If you are using prescriptions, the prescription number will show automatically in this field.

Once the above fields have been entered you will be taken into the **Detail** box where details of the items to be ordered are shown.

Code Press the **Tab** key to see the list of items held in OPAS. This will show a combination of OPrice items, Non Scheduled Items (NSI) and stock items.

CODE	DESCRIPT
A014	ADDITIONAL CHARGE FOR BRIDGED OR ARHED WAIST
A015	ANY ADDITIONAL PADDING TO ONE SINGLE ITEM OF FOOTWEAR
A016	HIGH OR ELONGATED STIFFENER UP TO 150MM
A017	HIGH BOOT UPPERS EACH ADDITIONAL 25MM
A018a	LAMBSWOOL LINING UP TO 150MM
A018b	LAMBSWOOL LINING EACH ADDITIONAL 25MM

Start typing the item that you are looking for and the pop-up list will go to those items that match your search criteria.

Position the green highlight on the item you require and press the **Enter** key.

If the item you are looking for is not in the list, press the **Esc** key to make the pop-up list disappear and leave the code field blank. If the item is not in the pop-up list and it is an item you order regularly you can add the item as a Non Scheduled Item (**Utilities – NSI – Items see Utilities - Note 47. NSI**) so that it appears in the pop-up list in future.

Description If you have selected a schedule number in the *Code* field the description will automatically appear. If not, the description entered in the *Description* field above will appear.

Orthosis Code The Orthosis Code entered earlier on the order will automatically appear here. On most occasions this will be correct and pressing the

Enter key will take you to the next field. However, if you are ordering more than one item it may be that the Orthosis code entered earlier is not correct for both items. If you need to change the code on any of the order lines, press the **Tab** key to see the list of Orthosis codes available and make an alternate selection.

(V)AT *V* shows the rate of VAT for that item, as

S standard
E exempt
Z zero-rated
R reclaim.

The VAT field will default to **S** but you can overtype this with an alternate VAT rate.

Qty Enter the quantity to be ordered. This will default to 1 but can be overtyped. (The default *Qty* can be changed in **Utilities – Choices – Defaults**)

Price If you have selected a schedule number in the *Code* field and there is a price in OPAS for the item from the supplier named above, then the price will automatically appear.

If the price does not appear automatically it will have to be entered manually. If this is an item you order regularly you can add the price as a Non Scheduled Price (**Utilities – NSI – Prices** *see Utilities - Note 47. NSI*) so that the price will appear automatically in future.

Enter as many lines in the detail section as are needed, but you **must** press **Enter** after entering the *Price*, so that the highlight moves on to the next line. If you don't, background calculations are not carried out by the system and problems may occur in the calculation of VAT. Once you have entered the last line it is safest to press **Enter** to move the highlight into *Code*, then **Enter** again to move it into *Description* then **Enter** again to move it into *Notes*.

Notes Any additional information can be entered here.

Care Episode If a care episode has been created for this patient, the order can be linked to the care episode by entering the care episode reference number. Press the **Tab** key to see the list of care episodes entered on OPAS.

More than one order can be linked to a care episode. When the goods are booked in against an order, if the ACO field has been set to **A** (Appointment) or **C** (Collection) an appointment or collection letter will not be produced until all the orders quoting that care episode have been received.

<i>Technician</i>	If required, a Technician can be specified for the order. This is for those hospitals with an internal workshop. Press the Tab key to see the list of options. The Technicians seen in the pop-up list are created in Utilities – Choices – Technicians .
<i>Ward</i>	If the patient is an in-patient the Ward they are in can be entered here. Press the Tab key to see the list of options. The Wards seen in the pop-up list are created in Utilities – Choices – Wards .
<i>Fitting Note</i>	This is a multiple lined field to enable extensive fitting notes to be entered.

Once you have finished entering data into the required fields, press **Ctrl-Enter** to save the order and to return to the patient record.

If you have instant print switched on, the order will print automatically at this point (see **Orders - Note 7. Printing orders as they are raised**).


3. Adding a repeat order

If you need to add an order to a patient when they have already had an order for a similar orthosis, rather than enter the whole order from scratch, enter a repeat order. Repeat orders is not an available option for those using prescriptions where each order has to be linked to a valid prescription when raised.


Menu: **Patients**

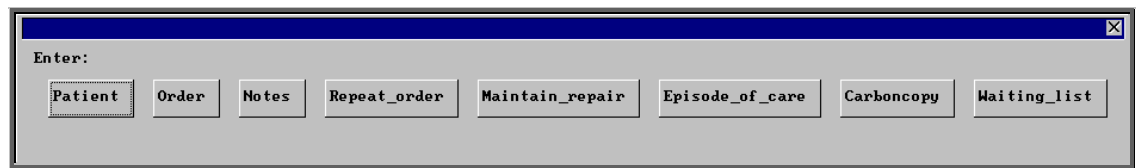
Find the patient who you wish to add a repeat order for.

Firstly, select which of the patients previous orders you would like to repeat. To do


this, press the 'arrow' icon  (or **PgDn**) so that you can see the order table. Select the relevant prescription by clicking on it with the mouse so that the green highlight appears. (Alternatively press **Alt-T**, select Order and move down the list with the arrow keys.)

Orders « ↔ »				
Date of Or	Order No	Sup	Desc	Received
22/10/2003	G00418	189	Repairs	
20/07/2002	G00414	078	Shoes	21/08/2002

Now click on the 'enter' icon  (or Edit, Enter) and the box below will appear.

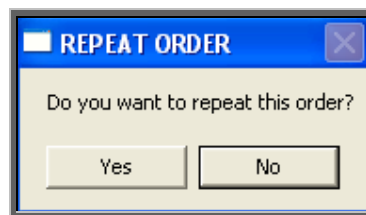


Note: If Repeat Order is not an available option you are either in the 'short' Patient screen or you are set up for prescriptions. To change back to the 'long'

Patient screen, click on the 'swap' icon  (or File, Swap)

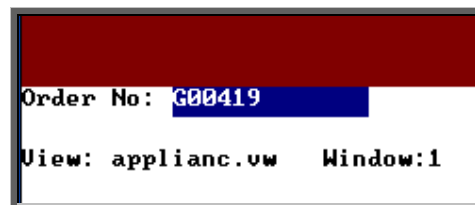
To select Repeat Order, click on the Repeat Order button with the mouse, or type **R**.

You will be shown the original order and asked to confirm that this is the order you wish to raise a repeat order on.

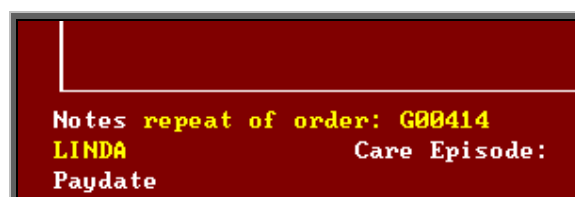


Click on **Yes** to continue.

At the bottom of the screen you will be offered the next order number in the sequence. Press **Enter** to accept this number. If you choose to alter the order number offered, ensure the number has not been used before, or is not one that may be offered in the future.



You will then be taken into the new order which will be a copy of the original. In the notes at the foot of the order, it will indicate that this was a repeat of an existing order.



Move through the order to make any necessary changes. Once you have finished, press **Ctrl-Enter** to save the order and to return to the patient record.


4. Amending an order



There are two ways to amend an order. You can amend an order from the **Patients** screen or by going into **History**.

1. From the patient screen

Menu: **Patients**

Find the patient whose order you wish to amend.

Click on the 'orders' icon  (or **G**oto, **H**istory, **C**urrent) to show the current orders for that patient.

Use the 'arrow' icon  (or **F6**) to find the order you wish to edit, and then click on the 'update' icon  (or **E**dit, **U**date).

You will be taken to the *Purchaser* field, as the Patient details cannot be amended.

To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change.


You can use **Tab** with the following fields, to show a pop-up menu from which to choose an alternative:

Purchaser
Supplier
Description
Orthosis Code
Referrer
Clinic
Clinician
Day
Transport
Code
Care Episode
Technician
Ward

When you have finished updating the order, press **Ctrl-Enter** to save the changes.

2. From History

Menu: History - Orders

Find the relevant order and then click on the 'update' icon  (or Edit, Udate).

You will be taken to the *Purchaser* field, as the Patient details cannot be amended.

To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change.

You can use **Tab** with the following fields, to show a pop-up menu from which to choose an alternative:

Purchaser
Supplier
Description
Orthosis Code
Referrer
Clinic
Clinician
Day
Transport
Code
Care Episode
Technician
Ward


When you have finished updating data, press **Ctrl-Enter** to save the changes.

5. Printing/Faxing orders in batch

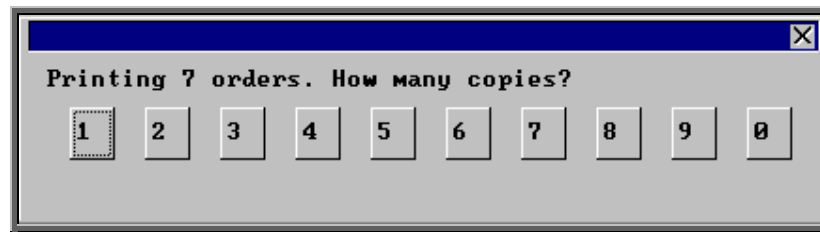
Orders are normally printed in batches (e.g. at the end of the day).

Menu: History – Orders

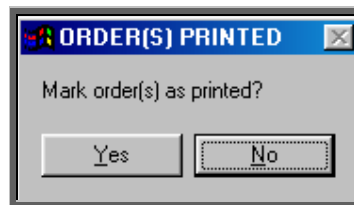
1. Printing to the printer

Click on the 'print' icon  (or File, Print) and then select **Orders** from the print menu.

The system finds those orders which have not yet been printed and asks how many copies you require:



After the required number of copies have been sent to the printer, you are asked whether to mark these orders as having been printed:




Since problems can arise with printers, we recommend that you wait until all the orders have emerged from the printer and been checked before responding **Yes** to this prompt. If there have been problems, e.g. the printer has run out of toner, respond with **NO** and these orders will then print again next time this routine is used.

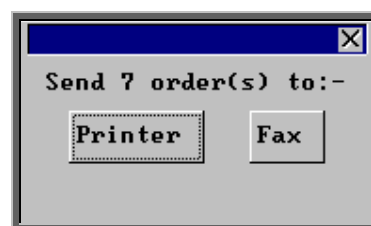
If you accidentally mark the orders as printed when they didn't actually print successfully [see Orders - Note 6. Re-printing a batch of orders.](#)

2. Faxing orders direct to suppliers

Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen (**Utilities – Choices – System**)

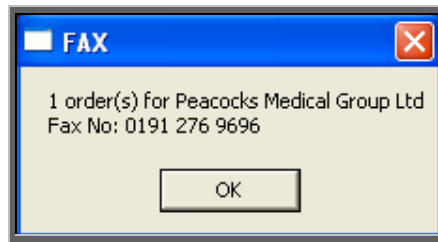
Click on the 'print' icon  (or **F**ile, **P**rint) and then select **Orders** from the print menu.

The system finds those orders that have not yet been printed and asks whether you wish to print or fax them.



If you select the **Printer** option by clicking on the **Printer** button with the mouse or by typing **P**, then you will continue as above by asking how many copies you require.

If you select the Fax option by clicking on the Fax button with the mouse or by typing **F**, a prompt will appear giving the fax number for the first supplier on the orders.

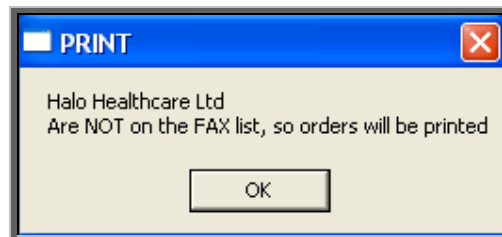


On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

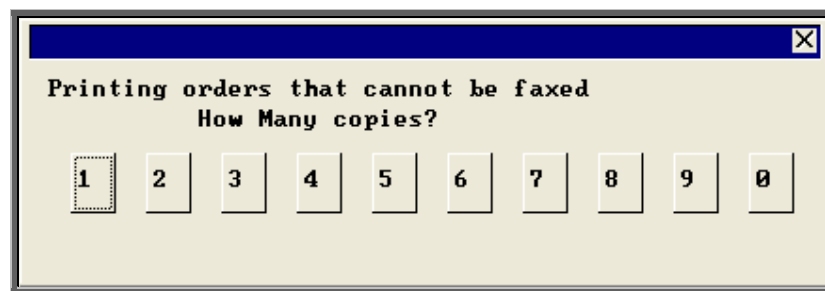
The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen. Once you know that the number remains, you will not have to make a note of the number in future.

Once the fax has been sent, if there are orders to another supplier, another prompt will appear with the fax number of the next supplier. This will continue until all the suppliers in the batch have been faxed.

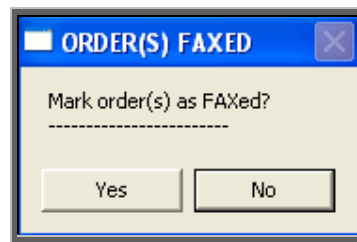
If orders are found for companies that are not set up for faxing (**Utilities – NSI – Fax see Utilities - Note 17. Choices - Fax**), the following prompt will appear.



Click on OK and then select how many copies to be printed instead..



Then you will be asked if you wish to mark the orders as faxed.



If you select **Yes** today's date will be entered in the *Printed* field on the orders and the orders will not be faxed again when orders are next printed in batch.

6. Re-printing a batch of orders

If you need to re-print orders printed today that have been marked as printed, e.g. because of a printer problem only discovered after the orders had been printed and marked as printed, this is done as follows.

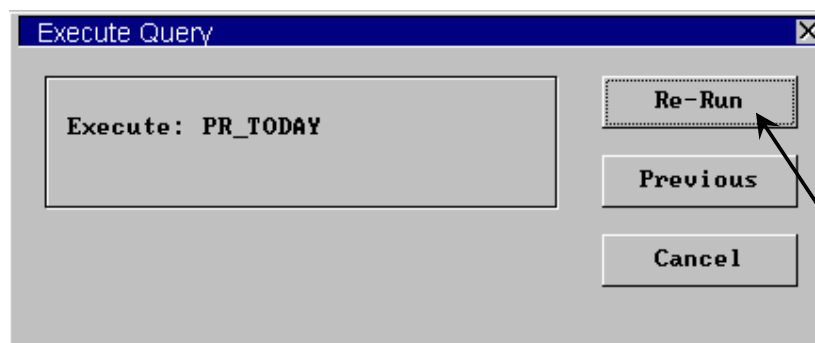
Menu: **History – Orders**

Click on Data and then Query

Click on This_view

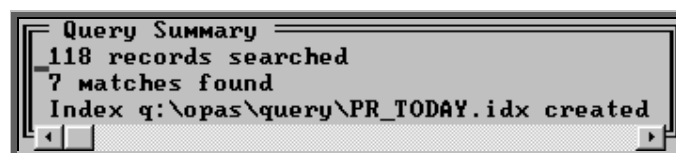
Using the down arrow key move the green highlight until it is on PR_TODAY

Click on Run




If you have not run this query before the option will be Run instead of Re-Run.

Click on Run or Re-Run.



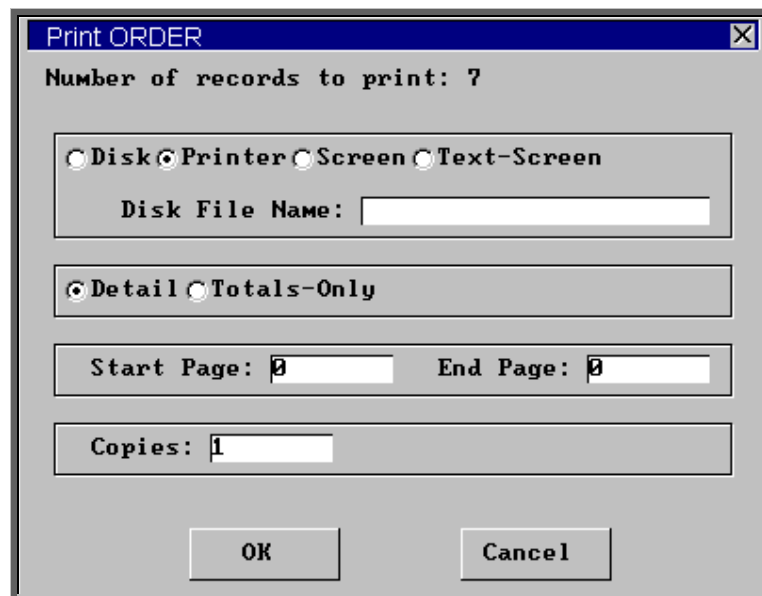
A Query Summary box will appear in the middle of the screen when it has found those orders where the printed date was today.

Press **Esc** once to remove the Query Summary box. The only orders you can see on the screen now are those that you need to reprint.

Click on the 'print' icon  (or **F**ile, **P**rint) and select **Custom Report**.

Click on **T**his-View and using the down arrow key move the green highlight until it is on **ORDER**.


Click on **R**un.



The image shows a 'Print ORDER' dialog box. At the top, it says 'Number of records to print: 7'. Below this are four radio buttons: 'Disk', 'Printer' (which is selected), 'Screen', and 'Text-Screen'. Under the 'Printer' option is a text field for 'Disk File Name:'. Below that are two radio buttons: 'Detail' (selected) and 'Totals-Only'. Then there are two text fields: 'Start Page: 0' and 'End Page: 0'. Below these is a text field for 'Copies: 1'. At the bottom are 'OK' and 'Cancel' buttons.

The **Copies** field will default to 1, but this can be amended if you need more than one copy. Then click on **OK** to continue.

Note: Until you come out of the Orders screen, the only orders you can see are those that you have just reprinted. To see all the orders again, either come out

of **Orders** and then go back into the option, or click on the 'sort' icon  (or **S**ort) and select **Physical**.

7. Printing orders as they are raised

There is a switch in the system parameters that will result in orders being printed instantly i.e. as they are raised. This is an alternate method to batch printing ([see Orders - Note](#)

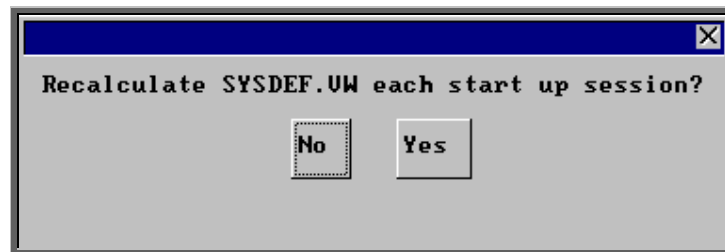
5. Printing/Faxing orders in batch). This function is not intended to be used if you are set up for faxing orders as the order will print regardless.

If you want each individual order to print automatically when you have finished inputting it, go into **Utilities – Choices – System** and enter the number of copies required in the *Orders* field.



Leave this field blank if you wish to continue batch printing orders.

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




Press the **Enter** key.


8. Re-printing individual orders

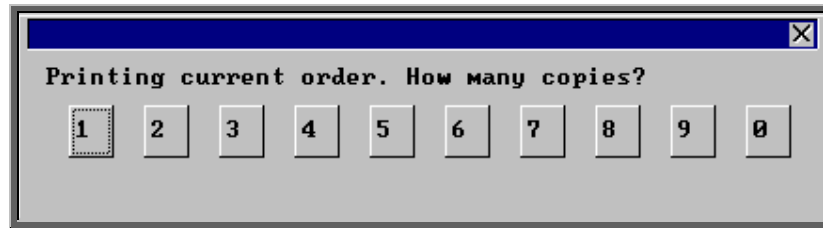
If you have lots of orders to print it is best to print them in batch ([see Orders - Note 5. Printing/Faxing orders in batch](#)), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: **Patients**

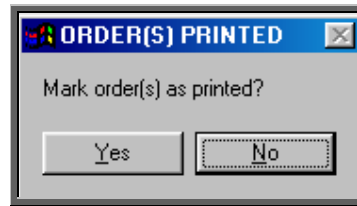
Find the patient whose order you wish to print.

Click on the 'orders' icon  (or **G**oto, **H**istory, **C**urrent) to show the current orders for that patient.

Find the relevant order, click on the 'print' icon  (or **F**ile, **P**rint), and select **Orders** from the print menu.



After the required number of copies have been sent to the printer, you are asked whether to mark these orders as having been printed:



If you select **Yes** to mark the order as printed, the order will not be selected for printing when you next batch print orders from **History – Orders**.

You can print an individual order as many times as you need. The fact that it has been printed before, or that it has been marked as printed will not prevent you from printing a single order from the **Patient** screen.

9. Re-faxing individual orders

Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen ([see Utilities - Note 38. Choices - System](#))

Menu: **Patients**

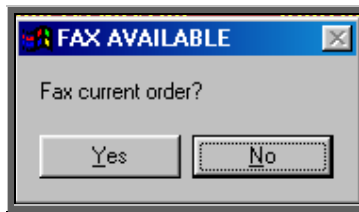
Find the patient whose order you wish to fax.



Click on the 'orders' icon (or Goto, History, Current) to show the orders for that patient.

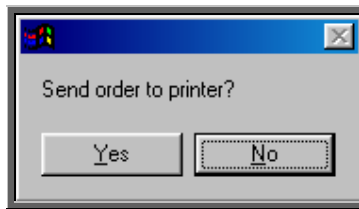


Find the relevant order, click on the 'print' icon (or File, Print), and select **Orders** from the print menu.



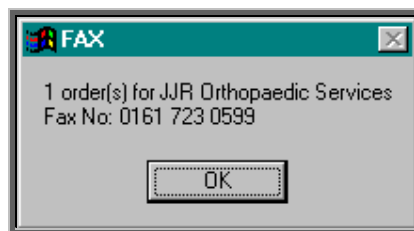
The above prompt will appear unless the supplier on the order is an internal stock supplier. If the supplier is **Stock** you will only be able to print the order and you will be asked how many copies are required.

If you do not want to fax the current order, and say **No**, the following prompt will appear.



On selecting **Yes** you will then be given the print box where you can choose how many copies you would like to print.

If, however, you select **Yes** a prompt will appear giving the fax number for the supplier on the order.



On clicking **OK**, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen. Once you know that the number remains, you will not have to make a note of the number in future.

Once the fax has been sent, you will be asked if you wish to mark the order as faxed.

If you select **Yes**, today's date will be entered in the *Printed* field on the Order and the order will not be faxed again when the orders are next printed in batch.

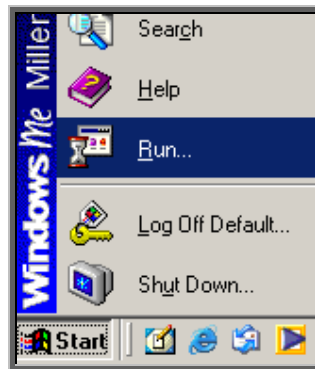
10. E-mailing orders

As well as being able to fax orders direct to suppliers, you also have the ability to e-mail orders directly (as long as you have e-mail on your computer!).

Setting Up

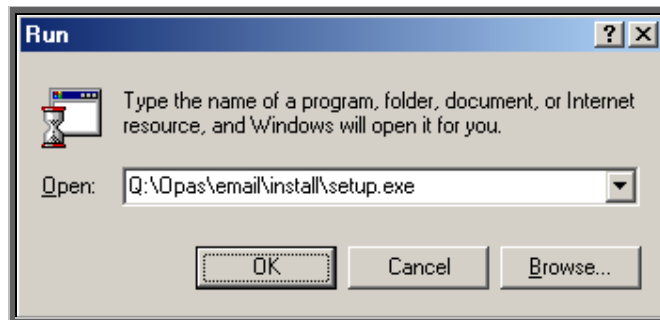
Step 1. Installing the e-mail daemon

The e-mail daemon acts as an interface between OPAS and your e-mail software and has to be installed on each computer that is to e-mail orders.

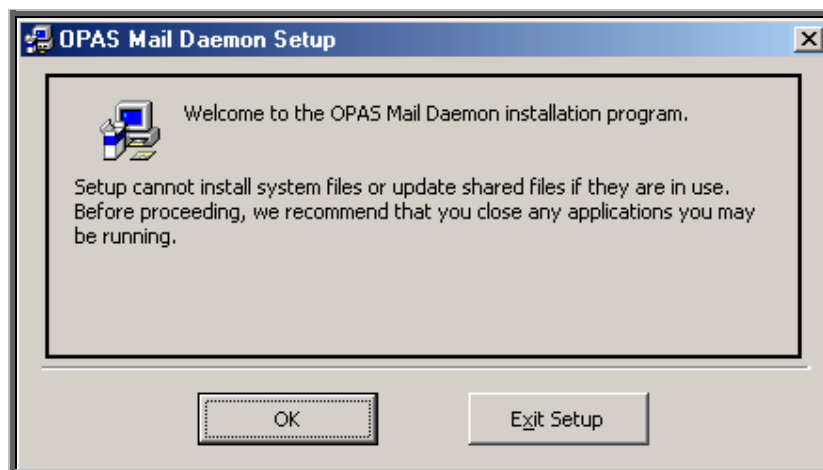


Use the **R**un option on your Start button to select
Q:\Opas\email\install\setup.exe.

If you are not familiar with this part of your computer, or the Run option has been disabled, IT should be able to do this for you.

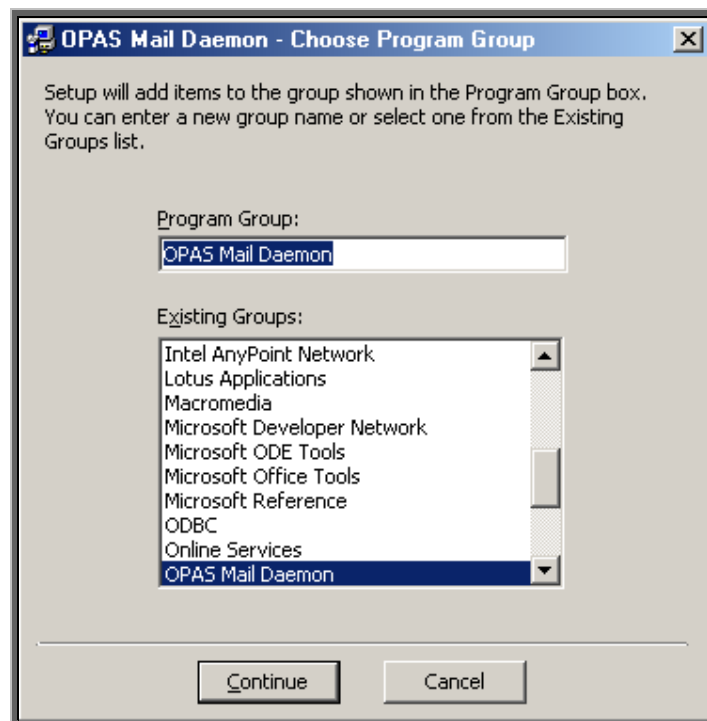
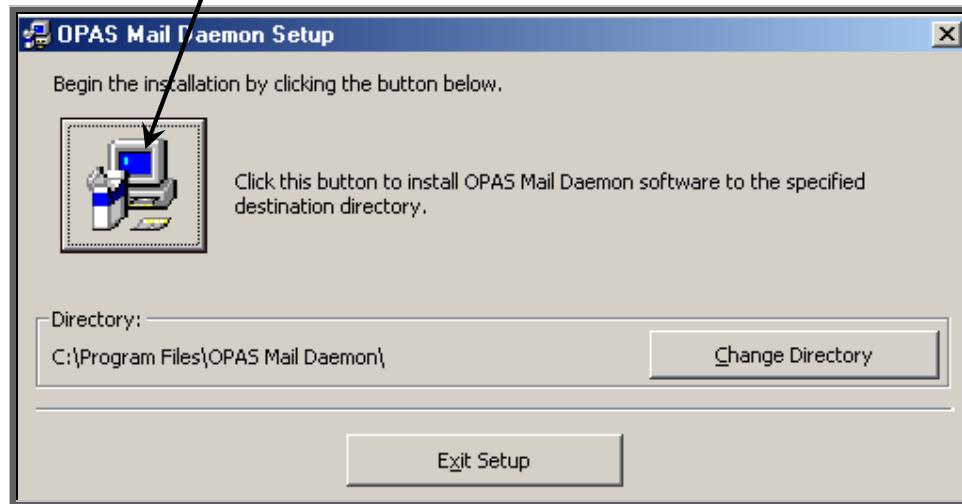


Click on OK to continue.



Click on OK to continue.

Click here to continue



Click on Continue.

A couple of boxes will appear while the installation procedure is carried out.

When it is complete, the following message will appear.



Click on OK.

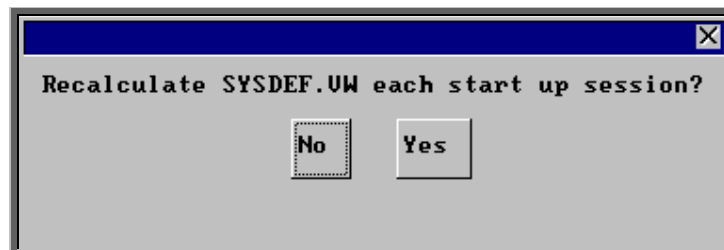
Don't forget – this needs to be done on each computer that you want to e-mail orders from.

Step 2. Switching e-mail on in OPAS

Go into **Utilities – Choices – System**. Update the *Email Orders* field to read c:\daemon\.



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



Step 3. Identifying which suppliers are to receive e-mails.

Go into **Utilities – Choices – E-mails**. Click on the 'enter' icon



(or Edit, Enter).

Code enter the supplier code, using the pop-up list to help you

Address: enter the e-mail address for the supplier

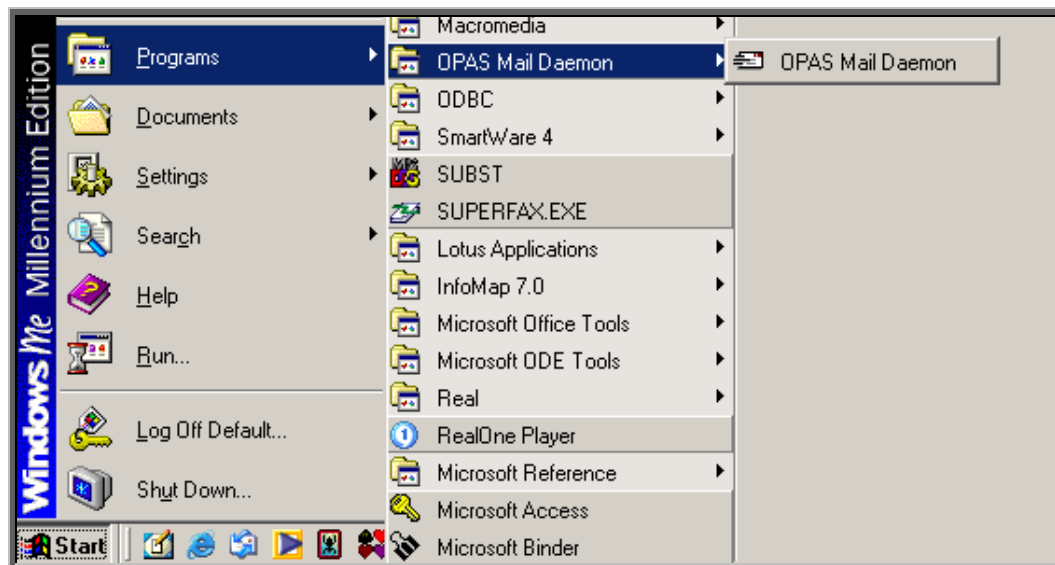
Enter the details for all those suppliers that you wish to e-mail orders to. If the supplier is not entered here, OPAS will not offer the option to send

an e-mail. However, if a supplier is entered here and you don't wish to e-mail a particular order when prompted, you can always say no to the prompt and print the order instead. Therefore, even suppliers that you want to e-mail occasionally would need to be entered here.

Using the e-mail function

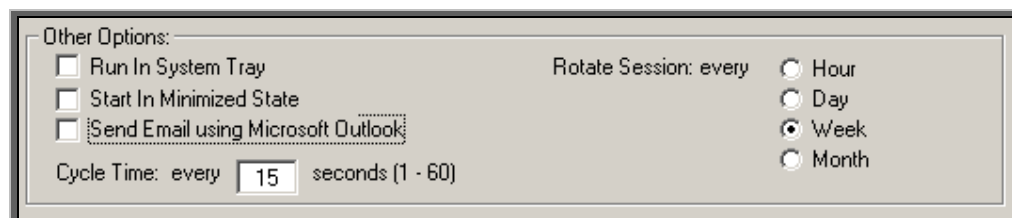
Step 1. Switching on the OPAS daemon.

The OPAS daemon needs to be open in order to take e-mail orders from OPAS to your e-mail software as they occur. To open the e-mail daemon, use the Programs option on your Start button to select OPAS Mail Daemon and then OPAS Mail Daemon again.



Alternatively you may wish to set up an icon on your desktop, or include it in your Windows Startup.

The first time you open OPAS Mail Daemon, click on the Options button. If you are using Microsoft Outlook, ensure the third box of the Other Options section is checked. You may also want to check the second box on Other Options so that the daemon starts minimized and sits on your taskbar out of the way.



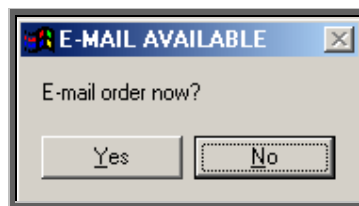
If you check any of the boxes, ensure you click on the **Save** button.

The OPAS Mail Daemon will now sit in the background doing its job, but will need to be closed at the end of the day, or when you stop using OPAS.

Step 2. E-mailing orders

Add your order in the usual way. When you finish adding the order, OPAS will check whether the order is for a supplier that you have set up for e-mailing (see Setting Up – Step 3 above).

If it is, you will be asked if you wish to e-mail the order.



If you do not wish to e-mail the order, click on **No**.


Note - If you select **No, you will not be able to e-mail the order later. This is the only opportunity for sending the order by e-mail.**

If you wish to e-mail the order, click on **Yes**. The order will be sent to the OPAS Mail Daemon and then on to your e-mail software. If your e-mail software is not currently running, it is likely that it will prompt you to open your e-mail system so that the order/message can be sent.

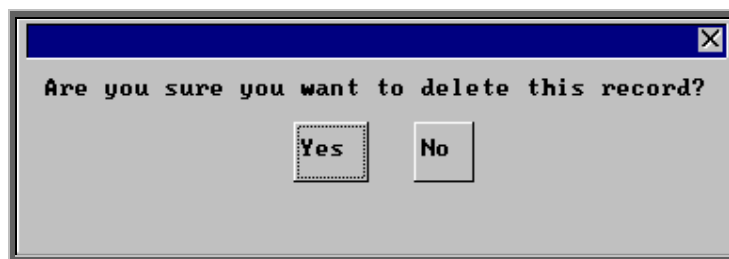
The order will be marked at the bottom with the date it was e-mailed. The printed date remains blank, which means that the order will be printed when printing orders in batch, but it will have a banner on it indicating that it is a confirmation of an e-mailed order. If you would prefer that e-mailed orders were not printed when batch printing, contact the Helpdesk.

11. Deleting an order

Menu: History – Orders


Find the relevant order and then click on the 'delete' icon  (or Edit, Delete).

You are asked to confirm deletion of the order.



If you click on Yes the record is deleted, but remains on the system. The message **Order cancelled** will appear above the *Description* field to indicate that it has been marked for deletion.



If you cancel the wrong order by mistake, you can re-instate the order by clicking on the 'delete' icon  (or Edit, Delete) again.

Note: Once an order is cancelled the details will not appear on any reports.

If you want to permanently remove the order from OPAS so that there is no longer any record of it, this can be done by clicking Edit, Krunch.

Warning: Edit, Krunch will remove **all** orders that have been marked as deleted (i.e. cancelled) and **cannot** be reversed.

12. Receiving an order

This option is used to mark an order as having been received from the supplier. If only part of an order is received, then the order should not be received until the rest of the order has arrived.

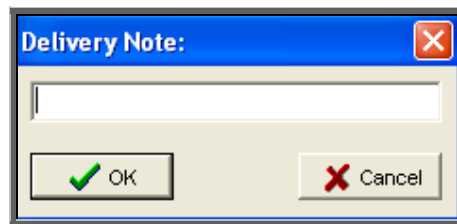
Menu: History - Orders

Find the relevant order and then click on the word Goods at the top of the screen, and then select In from the drop down menu.

Delivery note numbers can be recorded if the flag is switched on in the system parameters (see [Utilities - Note 38. Choices - System](#)).

Update after Pass	Yes	Process invoice for received/	Yes
Auto-update DOR	No	supplied goods only	
Manufacture	Local	Record Delivery Notes	Yes

If the *Record Delivery Notes* field is set to **Yes**, the following prompt will appear.



Enter the delivery note number and click on **OK**, or if there is no delivery note with that particular order simply click on **Cancel**.

(The delivery note number is held on the progress screen, which can be accessed by clicking on the word *Progress* above the icons on the **Order** and **Invoice** screen.)

Depending on what was entered in the *ACO* field when the order was added, the following will then occur.

'A' entered in the *ACO* field

'A' is entered in the *ACO* field when the patient requires an appointment to be allocated when the goods have been received. Therefore, when you select Goods - In, OPAS will search for the next available appointment based on the criteria entered on the order, i.e.

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

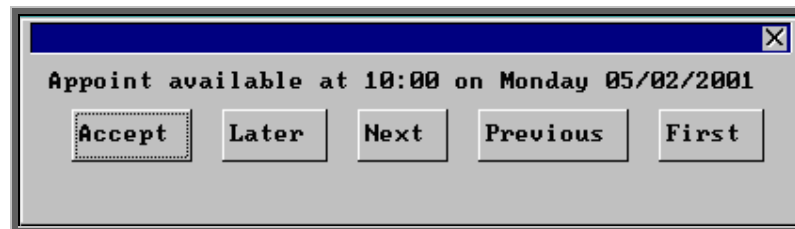


When the first available appointment is offered, you initially have 3 options.

- **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**).

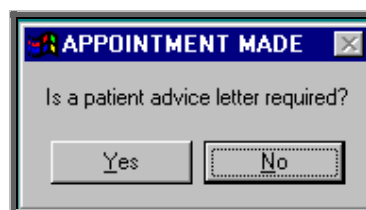
If you wish to abandon finding an appointment press **Esc**

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.
- **First.** Click on First (or type **F**) to go back to the First date/time that was offered.

Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.




If the patient requires transport, you are reminded to arrange it:



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.

Sex		D O B	
M		10/Jun/1961	
Purchase		Cross Ref or	
Date of Order	Order No	Hsp Ord No	
24/05/1999	G00236		
Progress		Received	27/01/2001
Date	Action	Appoint	01/02/2001
27/01/2001	I	Supplied	
		status	In stock
Orthosis Code		ABC123	
ARGE	Custom Footwear		
edic	ACO A Time	15 minutes	

Note: The appointment made will be shown as a fitting appointment i.e. F will be inserted in the *New* field on the appointment. If this is not

appropriate, click on the 'appointment' icon  (or **Goto, Appointment**) to take you to the appointment just made, and edit the *New* field accordingly.

'C' entered in the ACO field

'C' is entered in the *ACO* field when a letter needs to be automatically generated, advising the patient that their items are ready for collection. Therefore, when you select **Goods - In**, OPAS will tell the appointment module that a collection letter is required by creating a dummy appointment against the next day that clinic is running. These letters can subsequently be batch printed in **Appointment – Print – Letters** (see [Appointments - Note 15. Printing appointment letters](#))

The *Received* field will also be populated with today's date and the *Status* changed from On Order to In Stock.

'E' entered in the ACO field

'E' is entered in the ACO field when an appointment had already been made when the order was entered and no action is required when the goods are booked in. Therefore, when you select Goods - In, the *Received* field will be populated with today's date and the *Status* changed from On Order to In Stock.

'O' entered in the ACO field

'O' is entered in the ACO field no action is required when the goods are booked in. Therefore, when you select Goods - In, the *Received* field will be populated with today's date and the *Status* changed from On Order to In Stock.

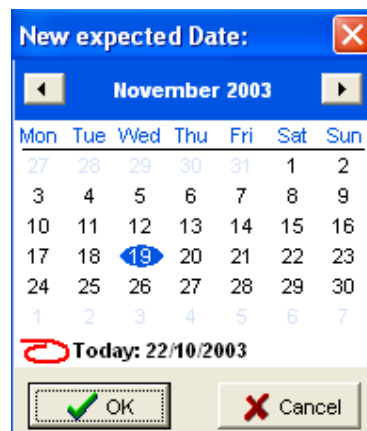
13. Returning goods

This option is used if goods have to be returned to the supplier, e.g. faulty or for finishing. As well as updating the order, a Goods Return Note can be produced if required.

Menu: **History - Orders**

Find the relevant order and then click on the word Goods at the top of the screen, and then select Return from the drop down menu.

•



Select the new expected supply date

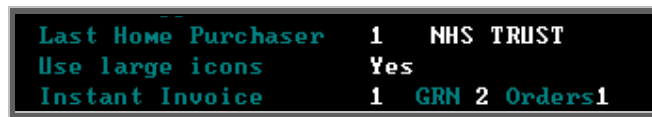
- You will then be asked for a Goods Return Number. If your supplier has given you a returns reference number to quote this can be entered here. Otherwise press the **Enter** key to leave it blank.
- Then you will be asked for the Reason for their return. You can type an explanation up to 50 characters long or press the **Enter** key to leave the field blank.

- Then you will be asked if you would like to print a Goods Returned Notification.



If you require a Goods Returned Notification, select **Yes** at this prompt. Otherwise select **No**.

Note: If you will always need a Goods Returned Notification printing, then the GRN flag in the System parameters can be set to the number of copies required.



These will then automatically print after you have entered the reason without being prompted. (see [Utilities - Note 38](#). [Choices - System](#))

When you look at the progress information on the order or invoice (see [Orders - Note 15](#). [Progress](#)), you will be able to see the Goods Return Number and the Reason for return if entered.

14. Supplying an order

Use this option to mark on the order when a patient is supplied or fitted with their goods.

Menu: **History - Orders**

Find the relevant order and then click on the word Goods at the top of the screen, and then select Supply from the drop down menu.

Today's date will be entered into the *Supplied* field and the *Status* changed from In Stock to Supplied.

Sex D O B		
M 17/Jun/1966		
Purchase	Cross Ref or	
Date of Order	Order No	Hsp Ord No
14/11/2000	G00336	234567
Progress		Received 14/11/2000
Date	Action	Appoint 23/11/2000
28/01/2001	S	Supplied 28/01/2001
Orthosis Code XY2890		status Supplied
Stock Footwear		

If, however, the patient is supplied while attending an appointment, as a part of logging the attendance of that appointment (by logging the patient's departure time or by inserting the appointment outcome) you will be asked if the patient was supplied.

ORDER

Appointment linked to an order. If patient was supplied with item(s), select 'YES' to update History

If **Yes** is selected, the order will automatically be updated as having been supplied.

If the item(s) have been supplied from stock, the Stock Control system and the order are updated if **Yes** is selected to the following prompt.

STOCK

Appointment linked to STOCK order. If patient was supplied with item(s), select 'YES' to update Stock Control

15. Progress

Menu: History – Orders or Menu: History – Invoices

On both the **Order** and **Invoice** screen there is a small **Progress** table. The last action on the order is indicated here.

Progress	
Date	Action
27/04/2003	I

The goods were booked **In** on 27 April 2003

The full progress table can be seen more clearly by clicking on the **Progress** option above the icons. This will also show delivery note numbers and goods return numbers if applicable.


Orthotic Patient Administration System					
File Data					
Order	Date	A	Action:	GRN	Reason
G2342342	06/06/2001	S	upplied		
G2342342	01/06/2001	I	n		
G2342342	21/05/2001	R	eturned		Adjustment to left raise
G2342342	15/05/2001	I	n		

If you want to see the progress information for all orders, rather than for a specific order, this can be done by going into **History – Progress**.

16. Jump to functions

Menu: **History – Orders** or Menu: **History – Invoices**

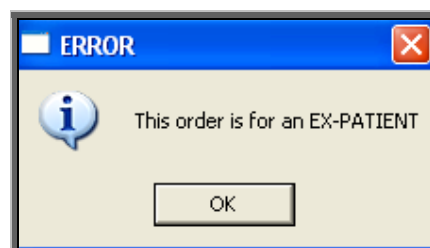
When in the **History** or **Invoices** screen, you have the ability to jump to that patient's patient record, an appointment linked to the order or a care episode linked to the order.

- 1) To jump to the patient record, click on the 'patient' icon  (or **Patient**)

Jumps to the patient record will only work where the patient is a current patient i.e. they have not been moved to Ex-patients. If a patient is an Ex-patient there name will be highlighted in red on the order.


History					
Hospital No	Patient	Sex	D O B	Purchase	Cross Ref or
TORUS006	MISS JENNY WREN	F	10/Oct/1910		

If you do try to jump to an Ex-patient, the following message will appear.



Having jumped to the patient record, you can move about that patient record looking at their notes, other orders etc. However, that patient is the only patient you can see. To be able to see all patients select **Patients** from the main menu.


To return to the order press the **Esc** key.

- 2) To jump to the appointment, click on the 'appointment' icon  (or **G**oto, **A**ppointment).

Jumps to the appointment will only work where the appointment is current i.e. it has not been archived. If you try to jump to an archived appointment, the following message will appear.



Having jumped to the appointment, press the **Esc** key to return to the order.

- 3) To jump to the care episode, click on the 'care episode' icon  (or **C**are).

To return to the order press the **Esc** key.

17. Deceased patients

History			
Hospital No	Patient	Sex	D O B
TORUS004	MISS TESSA SMITH	F	12/Dec/1934
		Purchase	Cross Ref or

If a patient is deceased, their name on the order will be highlighted in grey.

The order can still be processed, but if you book the goods in, and the ACO field is set for an appointment or collection letter, the goods will be marked as received but no appointment or collection letter will be generated. Instead the following message will appear.



18. Archiving old orders


There are two types of order archive available. Which you use, and when, will be determined by what you are hoping to achieve.

Option 1 (see below) will look for those orders that are more than 18 months old and where there has been no invoice.

Option 2 (see below) will archive all orders before a specific date (chosen by you) regardless of the status of the order.

Option 1

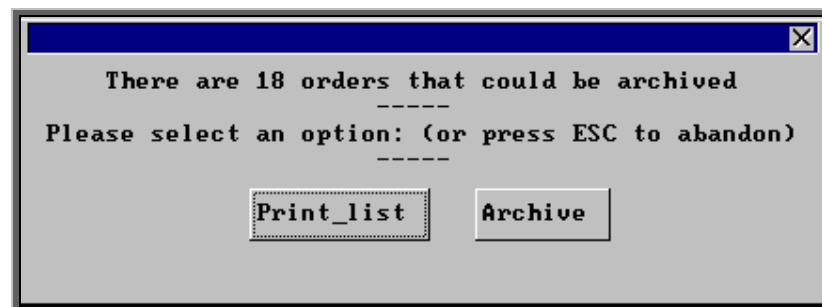
Menu: History – Invoices

Once in the **Invoices** screen click on the 'archive' icon  (or Archive).



If you wish to continue, click on OK. Otherwise select Cancel.

Once it has found all the orders that are 18 months old and have no invoice you will be presented with the following option.



If you want to see a list of those that can be archived click on **Print_list**.

Once the list has printed, the above option box will appear again. If you wish to continue to archive the orders click on **Archive**. If you wish to abandon the archive press the **Esc** key.

You will be informed when the archive is complete.



The orders have now been permanently removed from the current **Orders** database but can still be viewed by going into **History – Archive – Orders**, or by going to the **Patients** record and selecting **Goto, History, Archived**.

If you need to change the search criteria from 18 months old to a different age, then go into **History - Invoices** and:

- select Data, Query
- select This_view
- select ORDERARC
- select Edit
- select Edit...
- press **Ctrl-End** to move to the end of the line



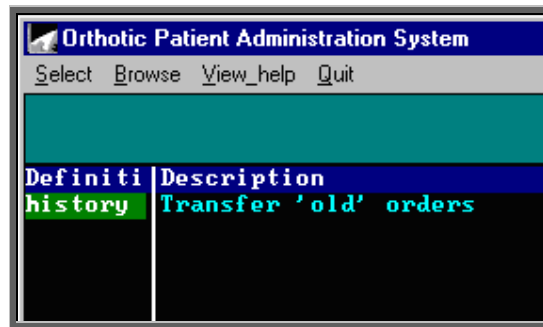
move left and change the **18** to the number of months required

press **F10** twice

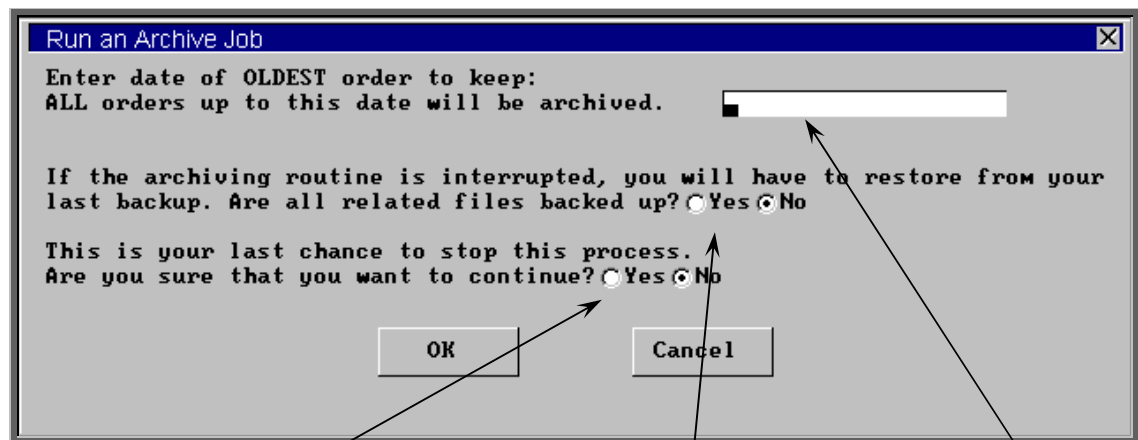
- select OK, and then Quit.

Option 2

Menu: History – Archive – Run



Click on Select to continue.



Click on **Yes** if you wish to continue with the archive. Otherwise select **No**


A backup **MUST** be taken before archiving orders. Click on **Yes** to confirm that this has been done. The archive will not continue unless you confirm a backup has been taken

Enter the date up to which orders are to be archived

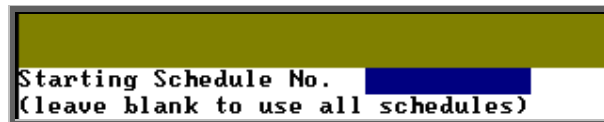
19. Detail

Menu: History – Detail

Detail shows a record for each individual line on an order. This screen provides the facility to interrogate the orders by schedule number. To analyse the data, click on the

‘analysis’ icon  (or Analysis).

At the bottom of the screen you are asked for the Starting Schedule No.



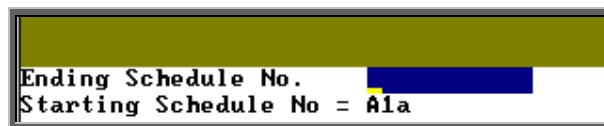
Starting Schedule No.
(leave blank to use all schedules)

If you want to analyse a range of schedule numbers, enter the starting schedule number of the range.

If you want to analyse one schedule number, enter that schedule number.

If you want to analyse all schedule numbers, leave this blank (and the next prompt will not appear).

Then you are asked for the Ending Schedule No.



Ending Schedule No.
Starting Schedule No = A1a

If you want to analyse a range of schedule numbers, enter the last schedule number of the range.


If you want to analyse one schedule number, enter that schedule number again.

Then you will be asked to enter the Starting Date of the date range to be analysed.



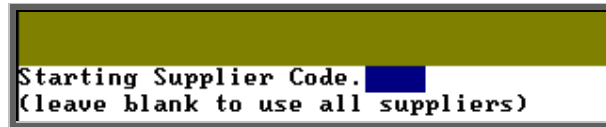
Starting Date:
(DD/MM/YYYY, or press ESC to use all dates)

Then you will be asked to enter the Ending Date of the date range to be analysed.



Ending Date: / /
Starting Date = 01/01/2000

Then you will be asked to enter the starting Supplier Code.



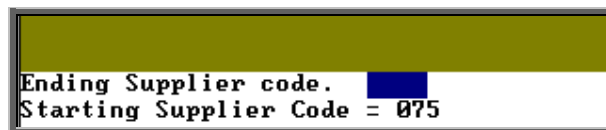
Starting Supplier Code.
(leave blank to use all suppliers)

If you want to analyse a range of suppliers, enter the starting supplier code of the range.

If you want to analyse one supplier, enter that schedule code.

If you want to analyse all suppliers, leave this blank (and the next prompt will not appear).

Then you are asked for the Ending Supplier code.



Ending Supplier code.
Starting Supplier Code = 075

If you want to analyse a range of suppliers, enter the last supplier code of the range.

If you want to analyse one supplier, enter that supplier code again.

Then you are asked for the Purchaser code.



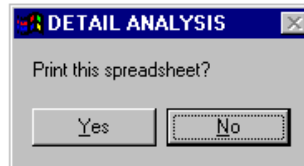
Purchaser code.
(leave blank to include all purchasers)

If you want to analyse one purchaser, enter that purchaser code.

If you want to analyse all purchasers, leave this blank.

OPAS will then find all the order lines that matched the criteria entered, and show the results on screen in spreadsheet format.

1	2	3	4	5
1	SCHEDULES: A1A - A2			
2	ORDERS DATED: 01/01/2001 - 31/03/2001			
3	SUPPLIER CODES: 075 - 075			
4	ALL PURCHASERS			
5				
6	SCHEDULE	Qty	Net Price	Gross Price
7	A1a	3.00	876.99	979.31
8	A1b	1.00	282.58	332.03
9				
10		4.00	1,159.57	1,311.34
11				
12				
13	Printed 5/6/2001 by ROOT			
14				
15				
16				
17				
18				
19				
20				
21				



You have the option to print the results. Whether you choose to print the spreadsheet or not, you then have the option to save the spreadsheet.



If you select Yes, you will be asked at the bottom of the screen to give the file a name. This will then be saved as a Lotus 123 file in the directory Q:\OPAS\ (your user name) so that the file can be opened in Lotus 123 or MS Excel.

20. Reports – Ad hoc

Menu: Reports – Financial – Ad hoc or

Menu: History - Reports

The **Ad hoc** report gives you the flexibility to report on specific order information by completing the selection criteria screen below appropriately.

OPAS Reports Selection Criteria Screen

Purchaser	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
Directorate	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
Referrer	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
Orthosis Code	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
Supplier	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
GP	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
Post Code	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range
Dates	<input type="radio"/> All	<input type="radio"/> One	<input type="radio"/> Range	
Using	<input type="radio"/> Ordered	<input type="radio"/> Received	<input type="radio"/> Supplied	<input type="radio"/> Invoiced
	<input type="radio"/> Purchase_Invoice	<input type="radio"/> Paydate		
Continue? <input type="radio"/> No <input type="radio"/> Yes				

Purchaser

- Select No if all Purchasers are to be included in the report but you **do not** require a sub-total for each Purchaser
- Select Yes if all Purchasers are to be included in the report and you **do** want a sub-total for each Purchaser. Use the space bar on your keyboard to move the highlight from No to Yes
- Select One if only one Purchaser is to be included on the report. Use the space bar on your keyboard to move the highlight from No 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.

Purchaser	<input type="radio"/> No	<input type="radio"/> Yes	<input checked="" type="radio"/> One	<input type="radio"/> Range	1	NHS TRUST
Directorate	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range		

- Select Range if a range of Purchasers are to be included in the report. Use the space bar on your keyboard to move the highlight from No to Range and press **Enter**. A pop up list will appear for you to select the first Purchaser in the range. Having selected the first Purchaser, this will be entered on the selection screen and the pop up list will stay for you to select the last purchaser of the range. Your selection will appear on the screen.

Purchaser	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input checked="" type="radio"/> Range	1	NHS TRUST
					to 2	GP Fundholder
Directorate	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range		

Directorate, Referrer, Orthosis Code, Supplier, GP and Postcode.

Apply the same selection procedure as with Purchaser to select No, Yes, One or Range.

Dates

Select All if you want to report on all orders on OPAS.

Select One if you want to report on one specific date. Use the space bar on your keyboard to move the highlight from All to One and press **Enter**. Type the date in the space provided in the format DD MM YYYY.

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.

Using

Select Ordered if you want to report on those orders that have an order date within the dates selected above

Select Received if you want to report on those orders that were received within the dates selected above

Select Supplied if you want to report on those orders that were supplied within the dates selected above

Select Invoiced if you want to report on those orders where the date of the suppliers invoice is within the dates selected above

Select **Purchase Invoice** if you want to report on those orders where the date of the purchase invoice is within the dates selected above

Select **Paydate** if you want to report on those orders that were passed for payment is within the dates selected above

Continue

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

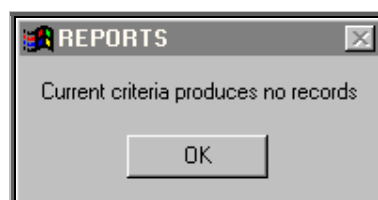
Select **Yes** if you wish OPAS to search for the orders that match the criteria selected

The selection screen below would show me all orders that had been supplied in April 2001 that were raised for Trauma & Orthopaedic for custom footwear, giving sub-totals for each supplier.

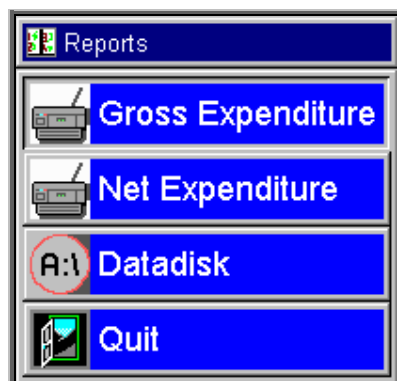
OPAS Reports Selection Criteria Screen

Purchaser	No	Yes	One	Range		
Directorate	No	Yes	One	Range	Trauma & Orthopaedic	
Referrer	No	Yes	One	Range		
Orthosis Code	No	Yes	One	Range	ABC123	Custom Footwear
Supplier	No	Yes	One	Range		
GP	No	Yes	One	Range		
Post Code	No	Yes	One	Range		
Dates	All	One	Range		01/04/2001 to 30/04/2001	
Using	Ordered	Received	Supplied	Invoiced	Purchase_Invoice	Paydate
Continue? No Yes						

Once you have selected **Yes** to continue, OPAS will search for all those orders that match the criteria selected. If no matches are found, the following message will appear.

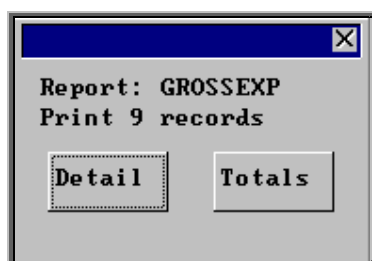


If orders have been found that match your criteria then the following Reports menu will appear.

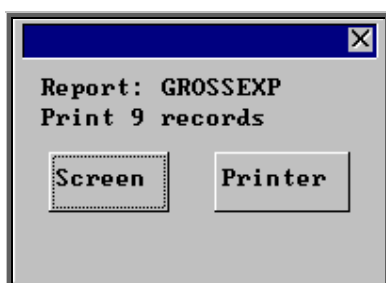


Gross Expenditure

If you wish to see the value of the orders including VAT, select **Gross Expenditure**.



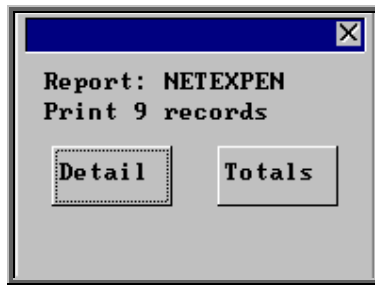
You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



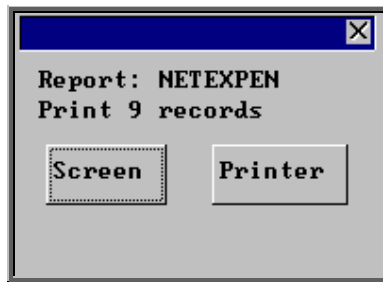
You will then be asked if you wish to see the information on the **screen** or to be sent to the **printer**. If screen is selected, having looked at it on the screen, you still have the option to send the information to the printer afterwards. If you don't want either option, press **Esc** to abandon.

Net Expenditure

If you wish to see the value of the orders excluding VAT, select **Net Expenditure**.



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



You will then be asked if you wish to see the information on the **screen** or to be sent to the **printer**. If screen is selected, having looked at it on the screen, you still have the option to send the information to the printer afterwards. If you don't want either option, press **Esc** to abandon.

Datadisk

The **Datadisk** option transfers the information found onto a 3 ½ floppy disk so that the data can be exported into a spreadsheet for manipulation, or into a report.

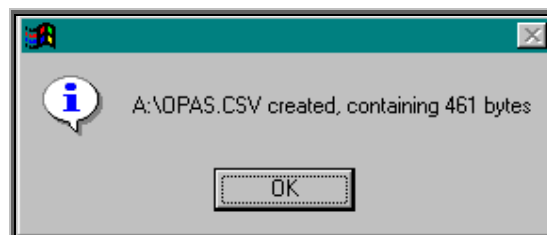
Having selected **Datadisk**, you can then choose what information on the order will be transferred. Move down the list, selecting those fields required by pressing **F7**. If a field is selected by mistake press **F7** again to de-select. The list is more than a page, so scroll down the page to see more. Once you have all the fields required press **F10** to continue. In the example below, I have selected the Order Number, Order Date, Patients full name and the Supplier name.

Fieldname	Type	Length	Filename	On table
Order No	Alpha	10	applianc	No
Order Ref	Counter	8	applianc	No
Post Code	Alpha	15	patients	No
Fit	Alpha	1	purchase	No
Pass	Alpha	1	applianc	No
Paydate	Date	8	applianc	No
Hsp Ord No	Alpha	20	applianc	No
Date of Order	Date	8	applianc	No
Sup Inv No	Alpha	10	applianc	No
Invoice Date	Date	8	applianc	No
Received	Date	8	applianc	No
Supplied	Date	8	applianc	No
Processor:	Alpha	8	applianc	No
Sales VAT	Alpha	1	purchase	No
Discount	Numeric	8	purchase	No
Hospital No	Alpha	12	applianc	No
Title	Alpha	12	patients	No
Forenames	Alpha	20	patients	No
Surname	Alpha	20	patients	No
Search	Alpha	18	oprice	No
MANUFACT	Numeric	8	oprice	No
code:	Alpha	15	item	No
DESCRIPT	Alpha	60	item	No
Purch Inv Date:	Date	8	applianc	No
pin:	Alpha	15	applianc	No
Clinician	Numeric	8	applianc	No
O:	Inverted	25	orthists	No
Supplier Code	Alpha	3	applianc	No
Cons_ref	Numeric	8	applianc	No
Purchaser	Numeric	8	applianc	No
Purchaser:	Alpha	30	purchase	No
NAME	Alpha	50	Supplier	No

A 3 ½ floppy disk now needs to be put into your computer, and then click on OK.



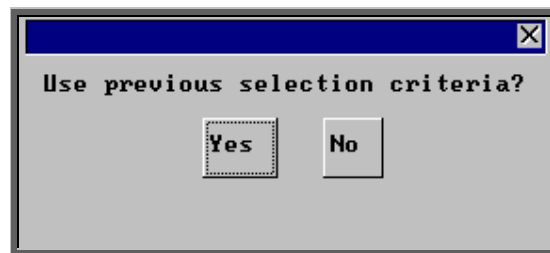
A comma separated variable file will be created called **OPAS.csv**.



This can now be exported into Lotus123 or MS Excel.

A	A	B	C	D	E	F
1	G00363	25/06/2002	MR	FRED	BLOGGS	Gilbert & Mellish Ltd
2	G00366	25/06/2002		S	ADLER	Jane Saunders & Manning Ltd
3	G00368	27/06/2002		DA	HANLEY	Jane Saunders & Manning Ltd
4	G00370	12/07/2002	MR	MARTIN	CRAVEN	Jane Saunders & Manning Ltd
5	G00369	12/07/2002		HJ	CARNE	Jane Saunders & Manning Ltd
6	G00371	25/07/2002	MR	FRED	BLOGGS	Ortho C Fab
7	G00375	11/09/2002	MR	KELVIN	BLOGGS	Jane Saunders & Manning Ltd

Note: The next time you select the **Ad hoc** report the following prompt will appear.



This is to save having to enter all the search criteria again if you want to run exactly the same report again, or perhaps the same report with a different date range.

21. Reports – Batches

Batch reports are report templates that are designed to be quick and easy to run. There are currently 27 different batch reports for orders alone, so we do not expect you to remember what they all do. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance.

For full details on how to run the order batch reports [see Reports - Note 17 to Note 42](#).

Users of OPAS have requested all the reports in OPAS. If there is a report currently not in OPAS that you require, please let us know. All new reports are included in future versions of OPAS so that everyone benefits.

Finally, and I cannot stress this enough, the format of the printed report can be tailored to suit your requirements. Just like your order and letters layouts were customised when you first started using OPAS, so can your reports. So, if you print a report and it shows the patient's hospital number and you would rather see the patient's name, or if the value of the order is showing net cost and you need gross or if the report is in date order and you want it to be in supplier order, then please let us know and we can change the report for you.

Invoices

- 1. Entering invoice details**
- 2. Editing invoices**
- 3. Passing invoices for payment**
- 4. Creating a file/disk for finance**
- 5. Printing sundry debtor invoices**
- 6. Archive**


1. Entering Invoice Details

The **Invoices** screen is simply another way of looking at the order with some additional fields for recording invoice information.

Most of the information that is input when the order is entered can be edited from here, but that information would normally be changed in the order screen ([see Orders - Note 4. Amending an order](#)). The purpose of the **Invoices** screen is to enter details of the invoice that is sent to you by the supplier after the order has been delivered.

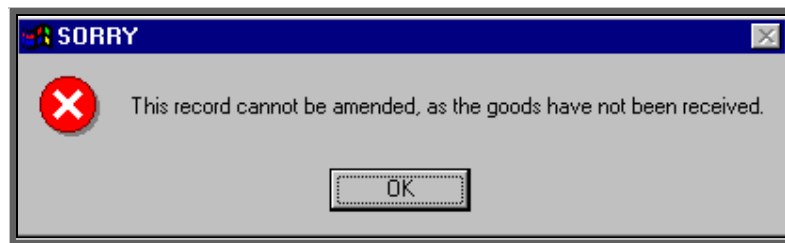
There is also the option to raise sundry debtor invoices (for the purpose of recharging) where the purchase is external.

Menu: History - Invoices


Find the invoice/order you wish to update by clicking on the 'find' icon  (or Data, Find) and selecting the relevant search criteria (Orders and Hsp_Ord_No are the most commonly used here).


Once you have found the invoice that you wish to edit the invoice details for, click on

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

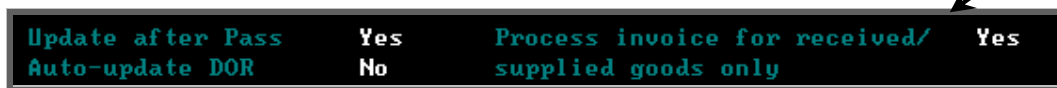


If the goods have been neither received nor supplied, you will be prevented from editing the invoice details.

The quickest method of getting to the order so that you can mark the goods as received or supplied is to click on the 'patient' icon  (or Patients) to take you to

the patient record, and then click on the 'history' icon  (or Goto, History, Current), to go to the patient's current orders. Once you have marked the relevant order as being received or supplied, press the **Esc** key twice to return to the invoice.

If you want to be able to process invoices when orders have not been received or supplied, this check can be removed by selecting **Utilities – Choices – System** and change the *Process invoice for received/supplied goods only* flag from Yes to No.



Update after Pass	Yes	Process invoice for received/	Yes
Auto-update DOR	No	supplied goods only	

1. Processing invoices for internal purchasers

<i>Hsp Ord No</i>	a hospital number can be entered or edited
<i>Sup Inv No</i>	supplier's invoice number
<i>Invoice Date</i>	date of the supplier's invoice entered in the format ddmmyyyy . This is mandatory field and you will not be allowed to continue until a date has been entered.
<i>Received</i>	date the item was received can be entered or edited
<i>Supplied</i>	date the item was supplied to the patient can be entered or edited
<i>Supplier Code</i>	the supplier can be entered or edited
<i>Purchaser</i>	the purchaser can be edited
<i>Orthosis Code</i>	the orthosis code can be edited

The cursor then moves into the Details table on the invoice. If the details are not complete or are incorrect, you have the ability to update the relevant fields accordingly.

<i>Code</i>	may be changed if required. Press Tab for a pop-up list of items
<i>Description</i>	may be changed if required. If you have changed the code and want to pull in the new description for this item then press the Tab key. If the description is edited here, the changes will not automatically flow back to the Order screen. If you want the changes to be reflected in the order, you should delete the line that is incorrect (by pressing Ctrl-F8) and enter a new line.
<i>Orthosis Code</i>	can be changed if required. Press Tab for a pop-up list of Orthosis codes
<i>(V)AT</i>	<i>V</i> shows the rate of VAT for that item, as

S standard
E exempt
Z zero-rated
R reclaim.

Qty can be changed if required

Nominal if invoice information is being exported into financial software, a nominal code can be entered here. (see [Utilities - Note 26. Choices - Nominal](#)).

Cost is the net cost and can be changed if required. Pressing **Tab** will change this to the standard net cost for this item from this supplier. If the cost of the item is not known by OPAS the price can be entered manually.

Note. If entering the cost manually ensure it is the total cost – i.e. the net cost multiplied by the number of items ordered

Gross is calculated according to the cost and the VAT status for that item. If either has been changed, you will need to press **Tab** to recalculate the gross for that item.

Sell is the selling price. This is only relevant if you are selling the item on to an external purchaser or reclaiming from a Directorate. Press **Tab** to calculate the standard selling price. This will be the cost of the goods to yourself * unless you have specified a selling price for that particular item in [Utilities – Choices – Fitting](#) (see [Utilities - Note 18. Choices - Fitting](#)). This can be changed if required.

* if the vat rate is S, X or E the cost to yourselves will be the gross price. If the vat rate is R, the cost to you will be the net price as the VAT is recoverable.

If the *Sell* field is not relevant, press **Enter** to move on to the next line

Once you have been through all the invoice detail lines, make sure you press **Enter** to move the green highlight to *Code* on the first blank line, then press **Ctrl-Enter** to finish.

2. Processing invoices for external purchasers

Hsp Ord No a hospital number can be entered or edited

Sup Inv No supplier's invoice number

<i>Invoice Date</i>	date of the supplier's invoice entered in the format ddmmyyyy. This is mandatory field and you will not be allowed to continue until a date has been entered.
<i>Received</i>	date the item was received can be entered or edited
<i>Supplied</i>	date the item was supplied to the patient can be entered or edited
<i>Purch Inv Date</i>	the date entered here will be the date of the sundry debtor invoice that will be raised. Today's date will appear automatically, but this can be changed.
<i>PIN</i>	if the sundry debtor invoice to be raised requires a purchase invoice number, this can be entered here. If you would like OPAS to automatically generate a <i>PIN</i> this can be set up in Utilities – Choices – Defaults . Contact the Helpdesk for advice on the formula to be entered.
<i>Clinician</i>	the clinician can be entered or edited
<i>Supplier Code</i>	the supplier can be entered or edited
<i>Purchaser</i>	the purchaser can be edited
<i>Orthosis Code</i>	the orthosis code can be edited

The cursor then moves into the **Details** table on the invoice. If the details are not complete or are incorrect, you have the ability to update the relevant fields accordingly.

<i>Code</i>	may be changed if required. Press Tab for a pop-up list of items								
<i>Description</i>	may be changed if required. If you have changed the code and want to pull in the new description for this item then press the Tab key								
<i>Orthosis Code</i>	can be changed if required. Press Tab for a pop-up list of Orthosis codes								
<i>(V)AT</i>	<p><i>V</i> shows the rate of VAT for that item, as</p> <table> <tr> <td>S</td><td>standard</td></tr> <tr> <td>E</td><td>exempt</td></tr> <tr> <td>Z</td><td>zero-rated</td></tr> <tr> <td>R</td><td>reclaim.</td></tr> </table>	S	standard	E	exempt	Z	zero-rated	R	reclaim.
S	standard								
E	exempt								
Z	zero-rated								
R	reclaim.								
<i>Nominal</i>	if invoice information is being exported into financial software, a nominal code can be entered here. (see Utilities - Note 26. Choices - Nominal).								

<i>Qty</i>	can be changed if required
<i>Cost</i>	<p>is the net cost and can be changed if required. Pressing Tab will change this to the standard net cost for this item from this supplier. If the cost of the item is not known by OPAS the price can be entered manually.</p> <p>Note. If entering the cost manually ensure it is the total cost – i.e. the net cost multiplied by the number of items ordered</p>
<i>Gross</i>	is calculated according to the cost and the VAT status for that item. If either has been changed, you will need to press Tab to recalculate the gross for that item.
<i>Sell</i>	<p>is the selling price. This is only relevant if you are selling the item on to an external purchaser or reclaiming from a Directorate. Press Tab to calculate the standard selling price. This will be the cost of the goods to yourself * unless you have specified a selling price for that particular item in Utilities – Choices – Fitting (see Utilities - Note 18. Choices - Fitting). This can be changed if required.</p> <p>* if the vat rate is S, X or E the cost to yourselves will be the gross price. If the vat rate is R, the cost to you will be the net price as the VAT is recoverable.</p> <p>If the <i>Sell</i> field is not relevant, press Enter to move on to the next line</p>
<i>Fitting</i>	is an additional charge for fitting. Pressing Tab will enter the fitting charge for this item if there is one. Fitting charges are optional and can be set up in Utilities – Choices – Fitting (see Utilities - Note 18. Choices - Fitting).
<i>VAT</i>	is the sales VAT. Pressing Tab will enter the sales VAT if is applicable. Whether the purchaser is charged sales VAT is held against their purchaser record (See Utilities - Note 33. Choices - Purchasers).

Once you have been through all the invoice detail lines, make sure you press **Enter** to move the green highlight to *Code* on the first blank line, then press **Ctrl-Enter** to finish.

If you have Instant Invoice switched on in the system parameters screen, you will be asked if you would like to print the sundry debtor invoice. (See **Invoices - Note 5. Printing sundry debtor invoices**)


Summary


If you are amending the invoice details because you have received the supplier's invoice and you want to pass the invoice for payment, the three things you must do are:

- enter the supplier's invoice number (*Sup Inv No*)
- enter the invoice date (or tax point) shown on the supplier's invoice (*Invoice Date*)
- check the figures for each Detail line. If the amounts entered in *Cost* and *Gross* are correct, there is no need to go down into the **Detail** box and you can press **Ctrl-Enter** to save any changes after entering the invoice date.

2. Editing invoices

Menu: History - Invoices

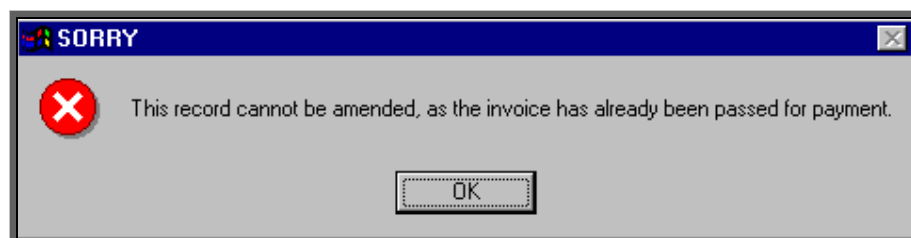
Find the invoice you wish to update by clicking on the 'find' icon  (or Data, Find) and selecting the relevant search criteria (Orders and Hsp_Ord_No are the most commonly used here).

Once you have found the invoice that you wish to alter, click on the 'update' icon  (or Edit, Update) to be taken into the **Invoices** screen.

Note. Within the system parameters (**Utilities – Choices – System**) you have the option as to whether the **Invoices** screen can be edited after the invoice has been passed for payment.

Include fieldnames	Yes
Update after Pass	Yes
Auto-update DOR	No

If your system parameter has been set to **No** then you will get the following message if you try to edit an invoice that has been passed for payment.



3. Passing invoices for payment

Once the **Invoices** screen has been updated with invoice details the next step is to pass the invoices for payment. There are two purposes for doing this:

1. To produce a report listing those invoices that are being passed for payment.
2. To mark the invoices with today's date so that you know when the invoice was passed on to you Finance Department for payment.

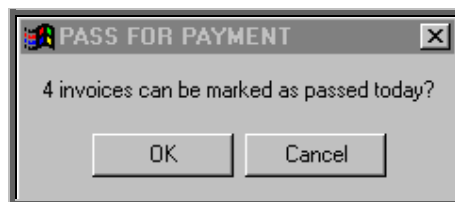
Menu: **History – Invoices**



Click on the 'print' icon (or **File, Print**) and select **Pass for payment**.

The system will then find those invoices that can be passed to the accounts department for payment (i.e. those invoices that have an invoice date entered and that have not been passed already) and prints a list of those invoices. As with all reports, the layout of this list can be modified if required.

You are then asked to confirm that these invoices should be marked as passed for payment:



If you select OK, those invoices printed on the list will be marked as passed for payment by inserting today's date in the *Paydate* field on the **Invoices** screen.

Invoices									
Order No	Hsp Ord No	Date of Order	Sup Inv No	Invoice Date	Received	27/04/2003			
G00350		28/05/2001	11211	01/04/2003	Supplied				
Hospital No	Title	Forenames	Surname	Appoint	29/04/2003				
G3350674		AG	YOUNG	Purchase Card:					
Purchaser:	pin:	Clinician							
Purchaser:	Purch Inv Date:	Supplier Code	013	Processor:	LINDA				
NHS TRUST	Tyco Healthcare (UK) Ltd								
Orthosis Code	Referrer	Directorate	Disc:	Created by:	Progress				
999999	Mr Surgeon	Trauma & Orthopaedic	ROOT		Date	A			
Description:	Adaptions								
Details									
Code	Description	Orthosis Code:	U	Nomi	Qty	Cost	Gross	Sell	
A010	LEVELLING CRADLE, MOULDED TO A	999999	S		1	12.24	14.38	14.02	
Paydate		27/04/2003	12345678			12.24	14.38	14.02	
PCG:		Ward 1	Costcode:	12345678/999999					

If you select **No**, those invoices will not be marked as passed and will appear on the report again the next time **Pass for payment** is run

This option can also be made to only pass those invoices that you have processed. It does this by looking at the Processor field on the **Invoices** screen.



If you need your pass for payment to be processor specific, contact the Helpdesk.

4. Creating a file/disk for finance


When invoices are passed to the Finance Department for payment, you also have the ability to produce a file/disk. This file/disk, containing information about the invoices, can then be imported into their finance software. This will save them having to re-key all the information that you have already entered once onto OPAS.

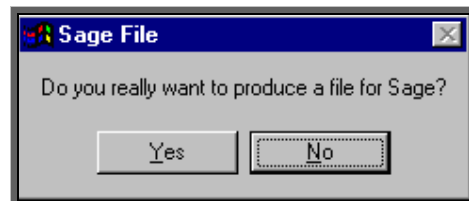
Sage is a widely used finance package and therefore there is an option specifically available for creating a file for finance if they are using Sage. (Option 1)

If finance are using a different software package to Sage we will need to configure OPAS to be able to create the disk in the required format. Once this has been done, a disk can then be produced following the instructions for Option 2.

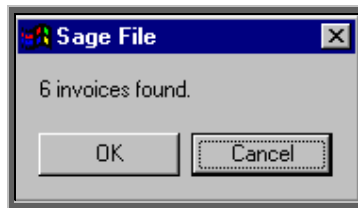
Menu: **History – Invoices**

Option 1 – Producing a disk for Sage

Click on the 'sage' icon  (or Sage).



If you wish to continue, click on **Yes**. OPAS will then search for those invoices where the Supplier Invoice has been recorded since you last produced a file for Sage. **Pass for payment** does not have to be run in order to produce the file.



Click on **OK** to continue. When invoice details are sent to the Sage file they are marked that they have been sent, so that they will not be sent again.



The above message will inform you of the name of the file and where the file has been saved. This file can then be

- copied onto a floppy disk and sent to the Finance Department
- sent as an attachment on an e-mail to the Finance Department
- be picked up directly by the Finance Department if the file has been saved on an area of the hospital network that they can access.

Option 2 – Producing a disk for a financial system other than Sage

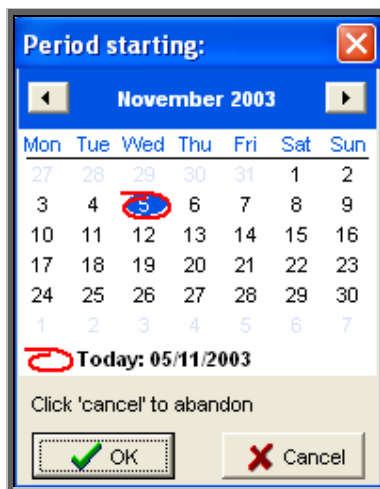
N.B. Before you follow the steps below, you must have run **Pass for payment** for those invoices you wish to be included on the disk. (**see Invoices - Note 3. Passing invoices for payment**)

Click on **F**inance at the top of the screen.

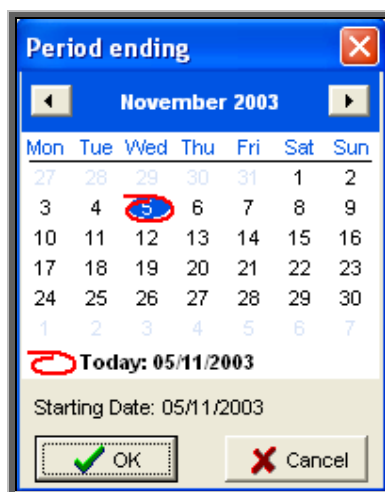


Click on **Yes** to continue.

A calendar will appear in the middle of the screen to select a start date. It will default to today's date, but this can be changed. You can still abandon the option at this stage by clicking on **Cancel**.

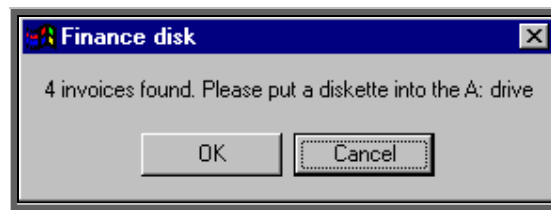


Then select the end date. You can still abandon the option at this stage by clicking on **Cancel**.

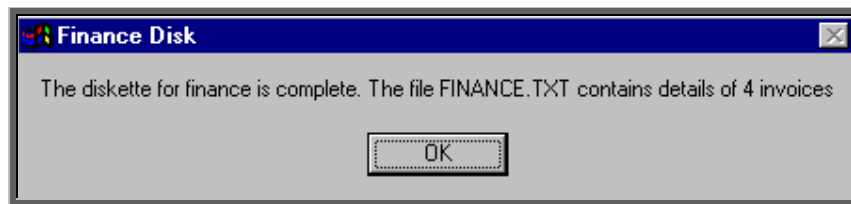


OPAS will then look for all those invoices where the *Paydate* is between the range entered. Therefore **Pass for payment** must be run before producing a disk for finance.

Note: Ensure the date range does not include dates that you have entered before, as OPAS will not check whether the information has been put on a disk for Finance before. It would, therefore, be a good idea to keep a manual record of the dates entered so that invoice information sent to Finance is neither duplicated nor missed.



Place a disk in the A: drive and click on OK to continue. Make sure the previous file produced for Finance is not on the disk, or if it is that it has already been passed to Finance the file will overwrite any previous finance file on the disk.



. This csv file can then be

- sent to the Finance Department on the disk
- saved onto your PC and sent as an attachment on an e-mail to the Finance Department
- be copied onto an area of the hospital network that the Finance Department can access.

5. Printing sundry debtor invoices

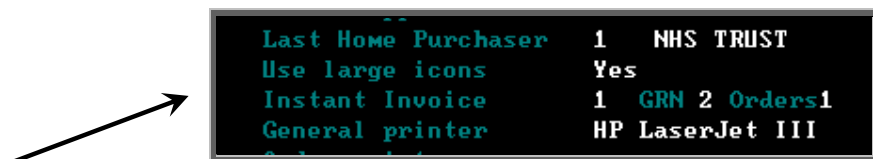
Menu: History – Invoices

Sundry debtor invoices to external purchasers can be

- i. printed individually as you update the **Invoices** screen (automatically)
- ii. printed individually (manually)
- iii. printed in batch

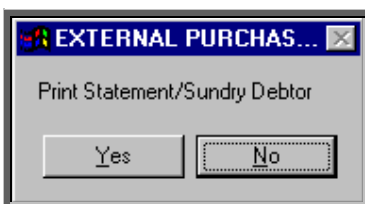
a) printing individually as invoice details are entered (automatically)

Within the system parameters (**Utilities – Choices – System**) set the *Instant Invoice* parameter to the number of each invoice required.



When you enter invoice details in the **Invoices** screen ensure that a date is entered in the *Purch Inv Date:* field. It is by entering a date in this field that indicates that you require a sundry debtor invoice to be printed (in order to recharge the cost incurred by the Trust).

When the invoice details have been entered press **Ctrl-Enter** to finish and the following prompt will appear. (Reminder: This will only happen if the *Instant Invoice* option is switched on in the system parameters.)




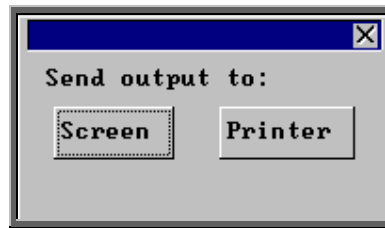
Select **No** if you do not wish to print the sundry debtor invoice at this stage. You can print it manually at a later time if required.

Select **Yes** to print the sundry debtor invoice now.

Note: The prompt calls the sundry debtor invoice “Statement/Sundry Debtor”. This is because you decide the output produced here. You may wish the output to be an invoice that can be sent to the external purchaser for payment, or an internal memo that can be sent to the Finance department for them to raise the sundry debtor invoice. You will need to tell us the format of the output that is required so that we can change it accordingly.

b) printing individually (manually)

Find the invoice you wish to print and click on the ‘print’ icon  (or **F**ile, **P**rint) and select **Invoice** from the print menu.



If you wish to look at the invoice on the screen first select **Screen**. Otherwise select **Printer**.

c) printing in batch



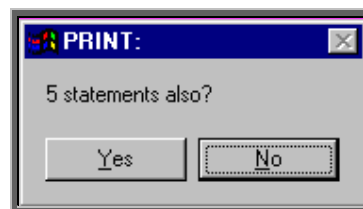
Click on the 'print' icon (or **F**ile, **P**rint) and select **Batches** from the print menu. Then select **Statements** from the batches menu.

Purchaser select the purchaser whose invoices you wish to print. To select all purchasers press **Esc** leaving the *Purchaser* field blank.

Start/End Date enter the start and end Purchase Invoice Date for the invoices you wish to print.

Firstly, a report will be printed listing those invoices where the *Purch Inv Date* is between the date range entered.


Then you will have the opportunity to print those invoices by selecting **Yes** to the following prompt.



6. Archive

Archive will look for those order that are more than 18 months old and where there has been no invoice.

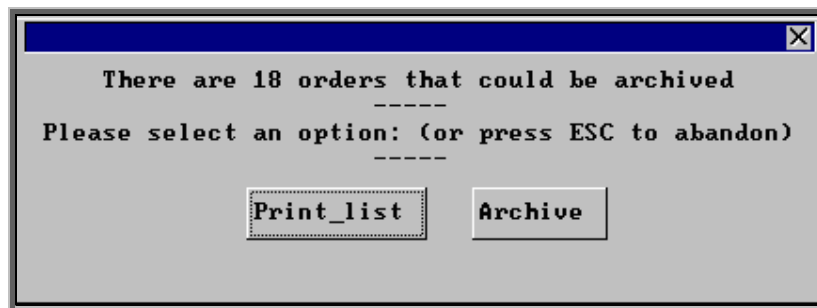
Menu: History – Invoices

Once in the **Invoices** screen click on the 'archive' icon  (or Archive).



If you wish to continue, click on OK. Otherwise select Cancel.

Once it has found all the orders that are 18 months old and have no invoice you will be presented with the following option.



If you want to see a list of those that can be archived click on Print_list.

Once the list has printed, the above option box will appear again. If you wish to continue to archive the orders click on Archive. If you wish to abandon the archive press the **Esc** key.

You will be informed when the archive is complete.



The orders have now been permanently removed from the current **Orders** database but can still be viewed by going into **History – Archive – Orders**, or by going to the **Patients** record and selecting Goto, History, Archived.

If you need to change the search criteria from 18 months old to a different age, then go into **History - Invoices** and:

- select Data, Query
- select This_view
- select ORDERARC
- select Edit
- select Edit...
- press **Ctrl-End** to move to the end of the line



move left and change the **18** to the number of months required

press **F10** twice

- select OK, and then Quit.

Appointments

- 1. Introduction**
- 2. Venues**
- 3. Creating clinic dates**
- 4. Viewing/Amending clinic dates (sessions)**
- 5. Blocking clinic dates (sessions)**
- 6. Limiting the number of appointments per session**
- 7. Cancelling clinic dates (sessions)**
- 8. Allocating appointments manually**
- 9. Allocating appointments automatically (via order)**
- 10. Allocating appointments automatically (via patient record)**
- 11. Allocating appointments automatically (via waiting list)**
- 12. Amending appointments**
- 13. Cancelling appointments**
- 14. Printing clinic lists**
- 15. Printing appointment letters**
- 16. Printing transport memos**

- 17. Updating appointment outcome/logging attendance times**
- 18. Auditing appointments**
- 19. Archiving sessions**
- 20. Printing reminder letters**
- 21. Printing DNA letters**
- 22. Diary**
- 23. Overview**
- 24. Clinicians**
- 25. Reports – Ad hoc**
- 26. Reports - Batches**

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.

- | | |
|------------------|---|
| <i>Reference</i> | is assigned automatically and cannot be changed |
| <i>Clinic</i> | 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 |
| <i>Phone</i> | enter the clinic’s phone number |
| <i>Collect</i> | 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.

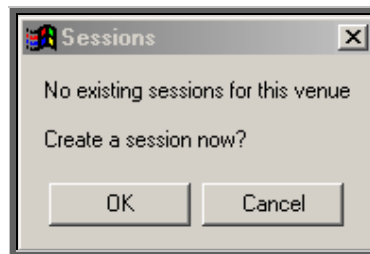
Letter select which collection letter is required for this venue (A-Z).

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 this will be entered automatically for you
Clinician 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
1 st day monthly	i.e. the first Monday of the month
2 nd day monthly	i.e. the second Monday of the month
3 rd day monthly	i.e. the third Monday of the month
4 th day monthly	i.e. the four Monday of the month
5 th 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, Update).



Venues

Reference	1	Clinic	Appliance Department
Phone:	01234 567890		NHS Trust Hospital
			Infirmery 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, Update), 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

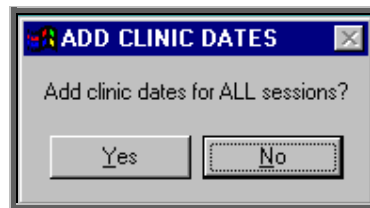
Having told the system when your clinics are held, i.e. which day, what times etc, the next step is to create clinic dates built on that information so that appointments can then be allocated to them.

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).

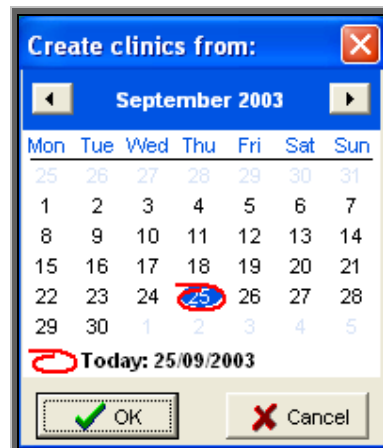


This prompt is asking if you wish to create clinic dates for all those clinics entered in the **Session** table for that Venue.

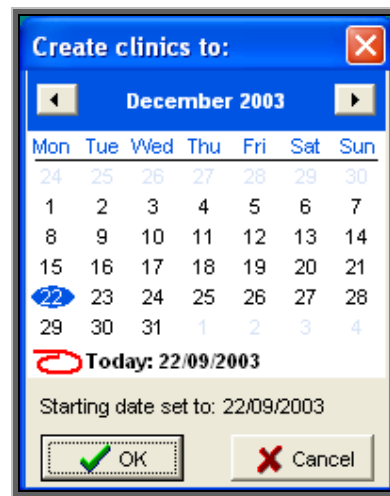
(If you do not want to create clinic dates for all sessions, click on **NO** and follow the instruction in *b) Creating clinic dates for individual sessions*)

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.



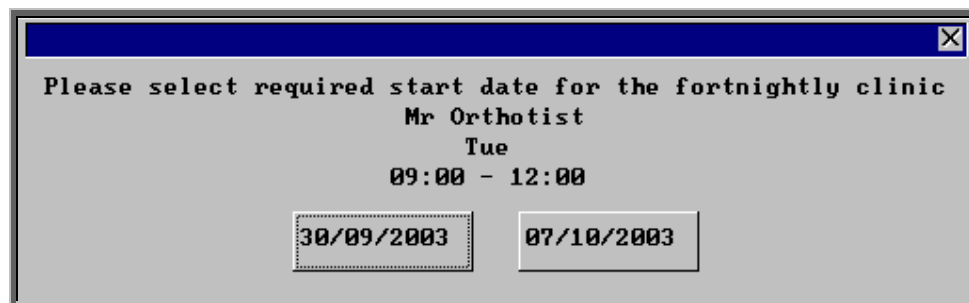
You will then be asked when you would like to create clinic dates to. We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS. Making clinic dates 3 to 6 months into the future would be ideal.



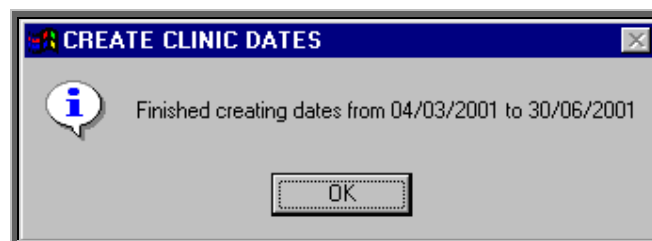
Having selected the 'to' date, press **Enter** (or click on OK). OPAS will now create the clinic dates.

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.




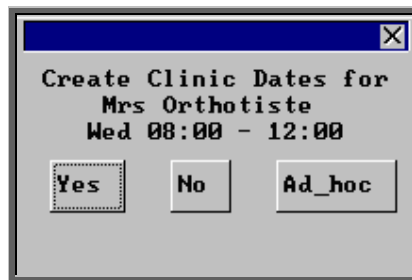
b) Creating clinic dates for individual sessions

Menu: **Appointments – Venues**

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

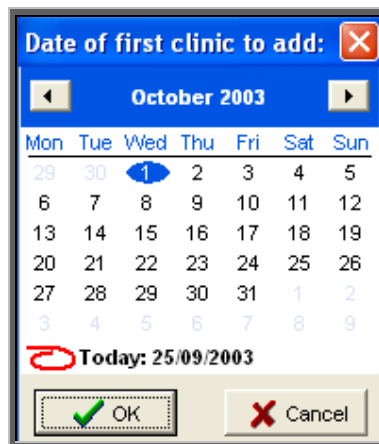
Press **Alt-T** and select **Session** to take you into the **Session** table. Using the up/down arrow keys on the keyboard, move to the Session that you wish to create

clinic dates for and then click on the 'clinician' icon  (or Session).

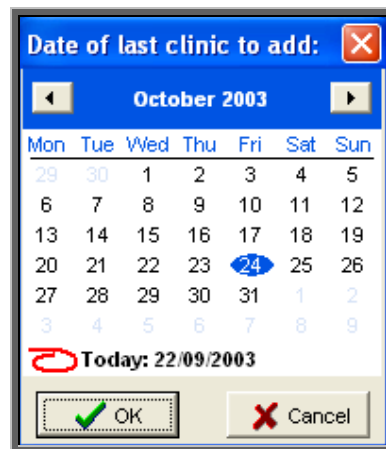


Select **Yes** to continue.

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.

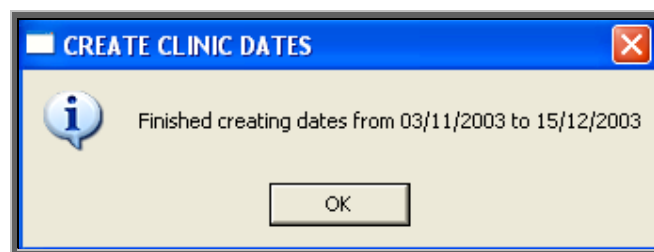


You will then be asked for the date of the last clinic to be created. We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS. Making clinic dates 3 to 6 months into the future would be ideal.



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

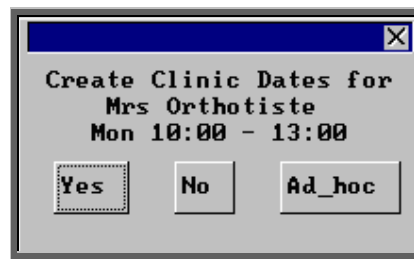
There may be occasions when you need to create additional clinic dates that are extra to the standard sessions e.g. a clinic that is not being held on the usual day due to a Bank Holiday. This can be done using the ad-hoc facility.

Menu: **Appointments – Venues**

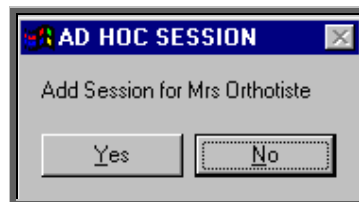
Find the **Venue** that you wish to create clinic dates for.

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).



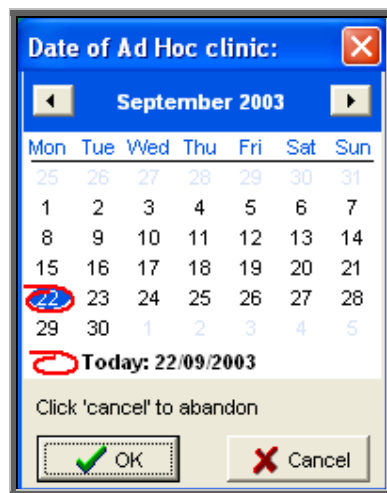
Select Ad_hoc to continue.



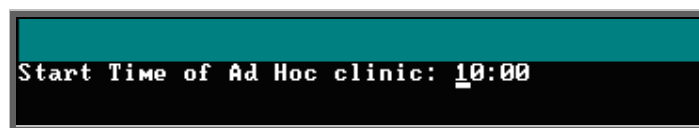
You will be asked to confirm that the ad-hoc clinic you wish to create is for the Clinician selected.

Select Yes to continue.

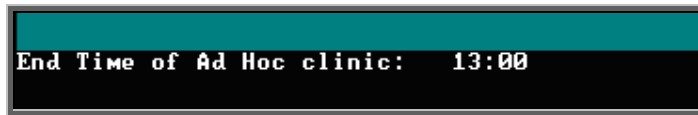
A calendar will appear in the middle of the screen to select the date of the ad-hoc clinic you wish to create. It will default to today's date, but this can be changed to the date required.



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

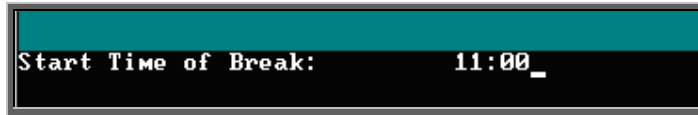


the time it will finish;



End Time of Ad Hoc clinic: 13:00

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



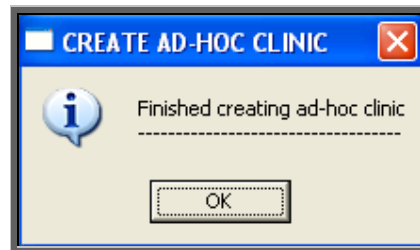
Start Time of Break: 11:00



End Time of Break: 11:30

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.



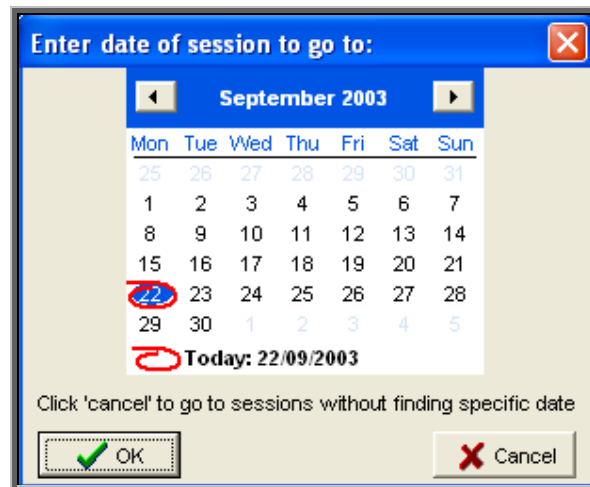
4. Viewing/Amending clinic dates (sessions)

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

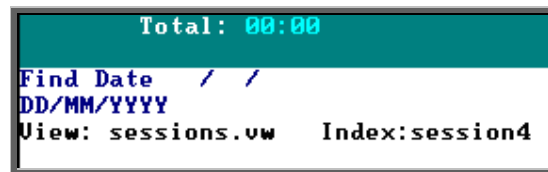
Menu: **Appointments – Venues**

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).

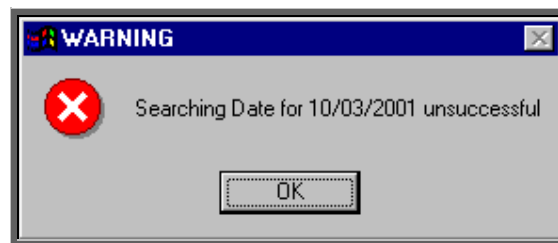
You will be taken into the **Sessions** screen and shown the oldest current session for that Venue. The sessions will be in date order, but the quickest way to find the session

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:

Orthotic Patient Administration System

File Appointments Block Cancel Edit Data Letters Sort

Sessions

FULL

Session 2012 Date 16/07/2003 Wednesday

Clinic Appliance Department

NHS Trust Hospital

Infirmary Road

Anytown

Orthotist Mrs Orthotiste

Session Start End

10:00:00 13:00:00

Break

AP A

Appointments

Time	To	Patient
10:00	10:15	MISS JENNY WREN
10:15	10:30	MISS KATHRYN LAWSON

Clerical:

Travel: Usage: 16.67%

Total: 00:30

New 0 Supply 1 Fit 1 Review 0

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.

Orthotic Patient Administration System

File Appointments Block Cancel Edit Data Letters Sort

Sessions

FAST

Session 2012 Date 16/07/2003 Wednesday

Clinic Appliance Department Start End

NHS Trust Hospital Session 10:00:00 13:00:00

Infirmery Road Break

Anytown AP A

Orthotist Mrs Orthotiste


Appointments

Time To	Patient	Notes:	Order
10:00 10:15	TORUS006	shoes	
10:15 10:30	TMP000002	insoles	

Clerical:

Travel: Usage: 16.67% New 0 Supply 1 Fit 1 Review 0

Total: 00:30

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.

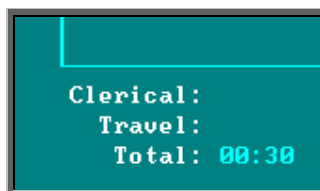
Having found the session to be amended (using Option 1 or Option 2 above), click on

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

You then have the ability to change the

Start time
End time
Break times
Date
Clinician

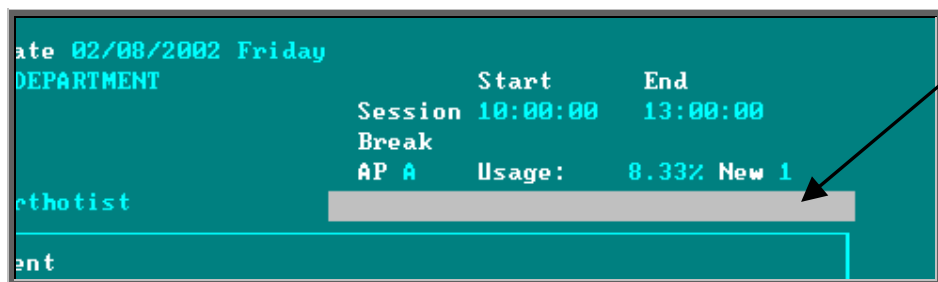
While you are in update mode you can also record the relevant time spent by the Clinician travelling to and from the clinic and time spent dealing with administration matters. This can be done by entering the relevant time in minutes in the *Clerical* and *Travel* fields underneath the session table.



Clerical:
 Travel:
 Total: 00:30

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.



ate 02/08/2002 Friday
 DEPARTMENT
 Session Start End
 Break 10:00:00 13:00:00
 AP A Usage: 8.33% New 1
 ethotist
 ent

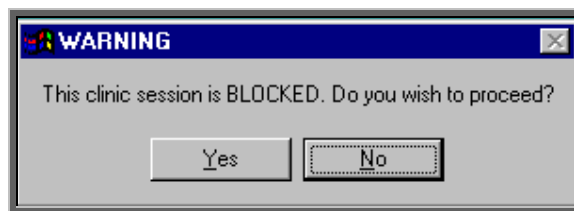
Enter the note in the space (upto 35 characters). Once entered, the note will appear in red so that it stands out.

/08/2002 Friday		
MENT		
	Start	End
Session	10:00:00	13:00:00
Break		
AP A	Usage:	8.33% New 1
st	Ward visits today at 11.00	


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

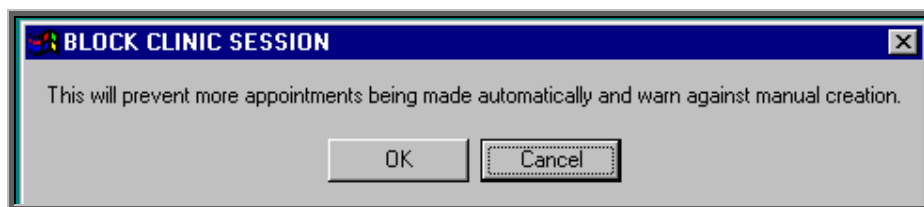
5. Blocking clinic dates (sessions)

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.

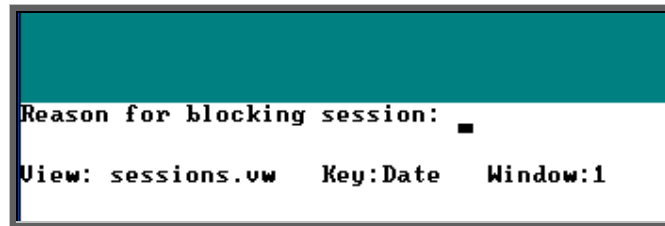


Menu: Appointments – Current – Sessions

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



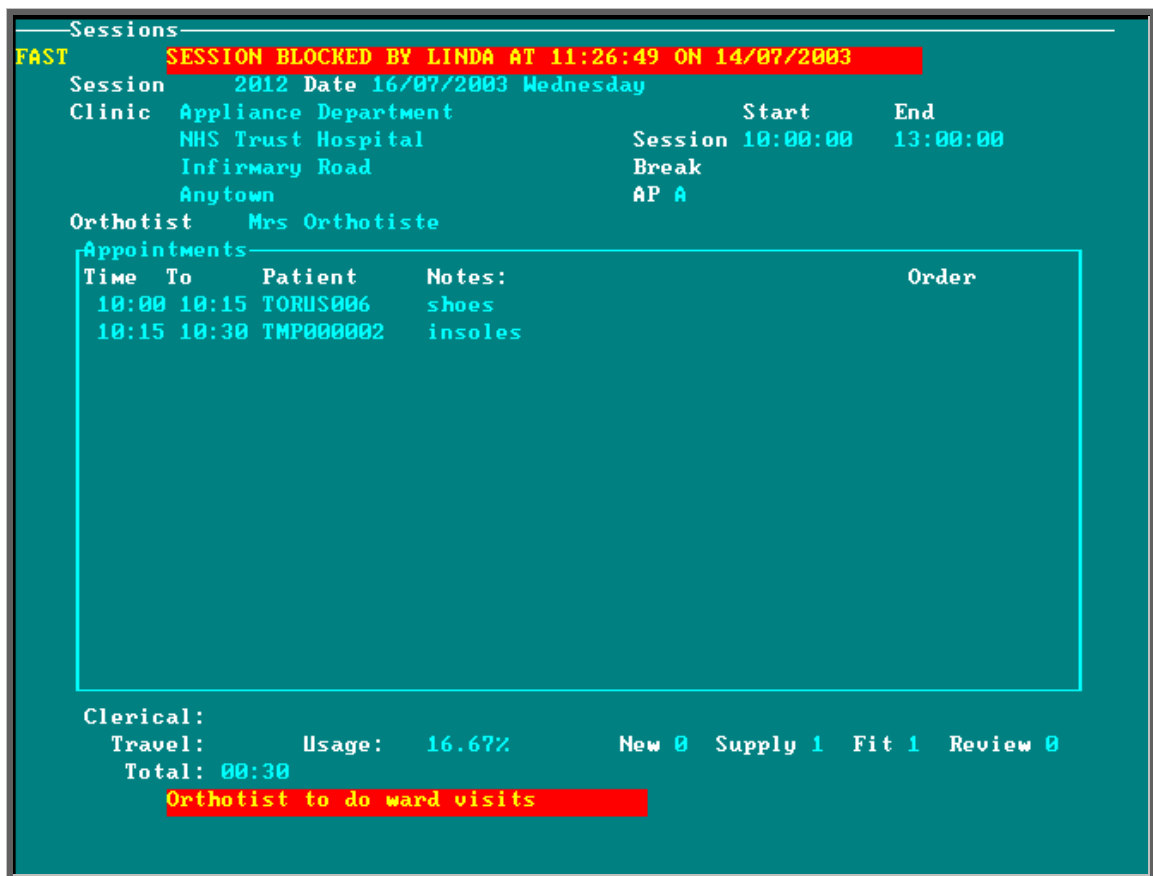
To continue, click on OK, and at the bottom of the screen type the reason (up to 35 characters) why the session is being blocked.



Reason for blocking session: ■

View: sessions.vw Key:Date Window:1

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



Sessions

FAST **SESSION BLOCKED BY LINDA AT 11:26:49 ON 14/07/2003**

Session 2012 Date 16/07/2003 Wednesday

Clinic Appliance Department Start End

 NHS Trust Hospital Session 10:00:00 13:00:00

 Infirmary Road Break

 Anytown AP A

Orthotist Mrs Orthotiste

Appointments


Time	To	Patient	Notes:	Order
10:00	10:15	TORUS006	shoes	
10:15	10:30	TMP000002	insoles	

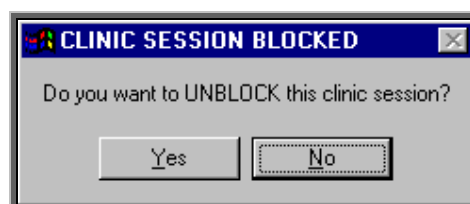
Clerical:

Travel: Usage: 16.67% New 0 Supply 1 Fit 1 Review 0

Total: 00:30

Orthotist to do ward visits

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



CLINIC SESSION BLOCKED

Do you want to UNBLOCK this clinic session?

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 window with two main sections. The top section is labeled 'Result' and contains the text 'Unblocked by LINDA 14/07/2003' followed by 'Text' on a new 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.

Recalculate SYSDEF.UW each start up session?

No
Yes

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.

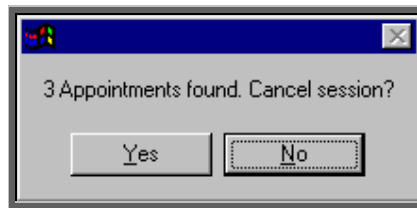


If there are any appointments booked on the session that you are cancelling, OPAS will automatically re-appoint them to the next available appointment at the same Venue as the cancelled session (but not necessarily the same Clinician). You will have no say as to where these replacement appointments are 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 no 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.

Reason for cancelling session:

View: sessions.vw Key:Date Window:1

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

Sessions

FAST SESSION CANCELLED BY LINDA AT 12:06:42 ON 14/07/2003

Session	1978 Date 17/07/2003 Thursday			
Clinic	Appliance Department	Start	End	
	NHS Trust Hospital	Session	09:00:00 16:45:00	
	Infirmery Road	Break	12:00:00 13:15:00	
	Anytown	AP	A	
Orthotist	Mr Orthotist			

Appointments

Time	To	Patient	Notes:	Order

Clerical:

Travel: Usage: 0.00% New 0 Supply 0 Fit 0 Review 0

Total: 00:00

orthotist ill

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)).

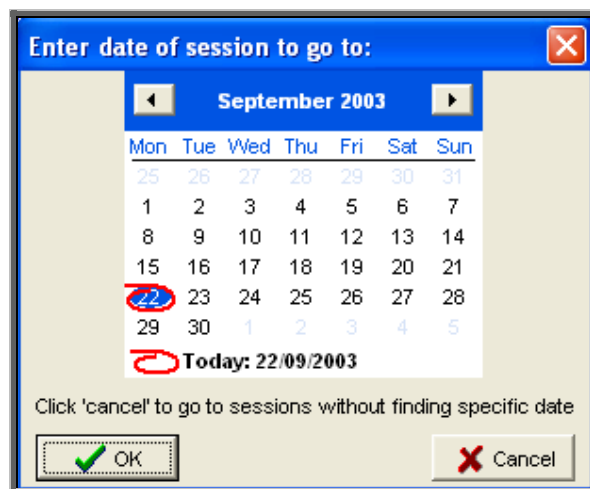
8. Allocating appointments manually

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.

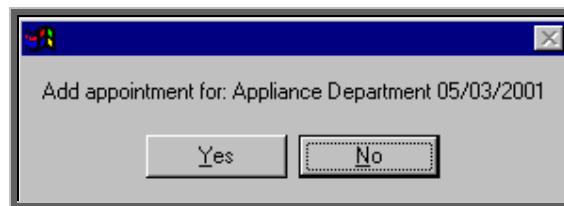
Clerical:				
Travel:	Usage:	16.67%	New 1	Supply 1
Total: 00:30			Fit 0	Review 0

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

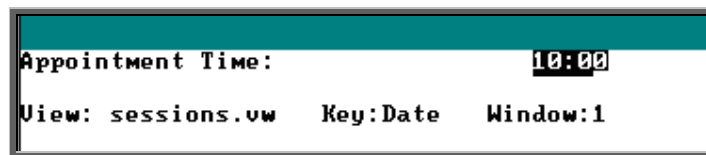
Once you have found the session you wish to make an appointment on, click on the 'appointment' icon  (or **A**ppointments, **A**dd).



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.

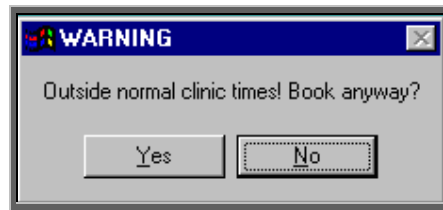


If you select an appointment time that is already taken you will get the following message and have to try adding an appointment again, this time with a valid time.



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:

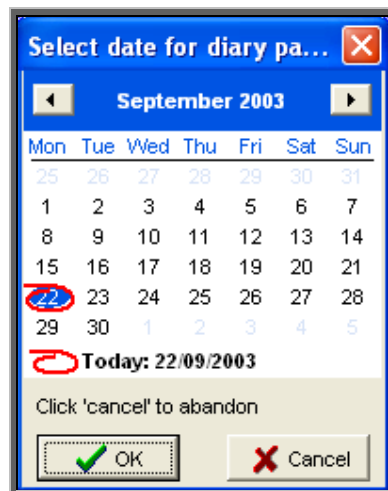
OR

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

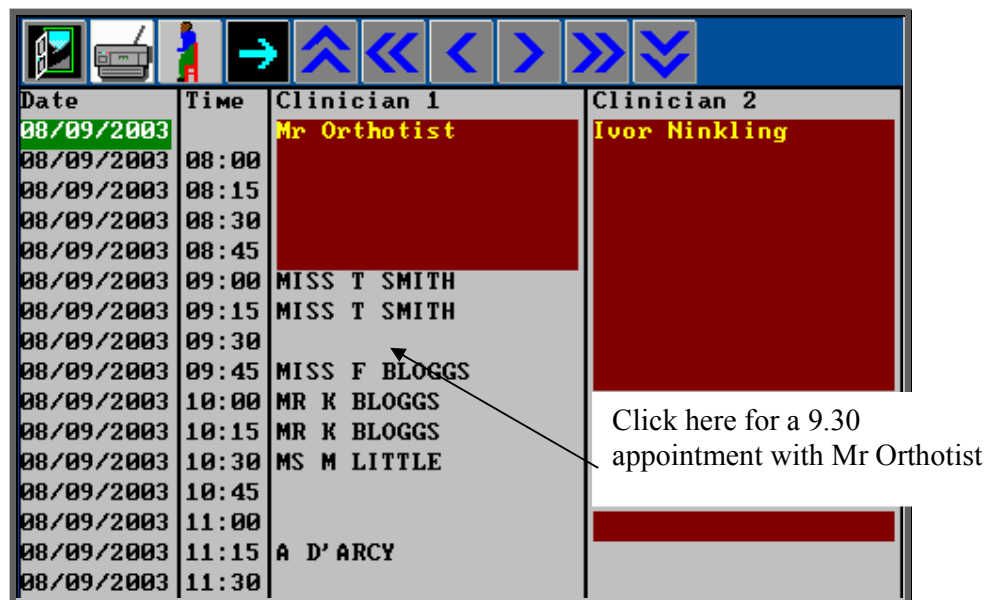



A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

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).

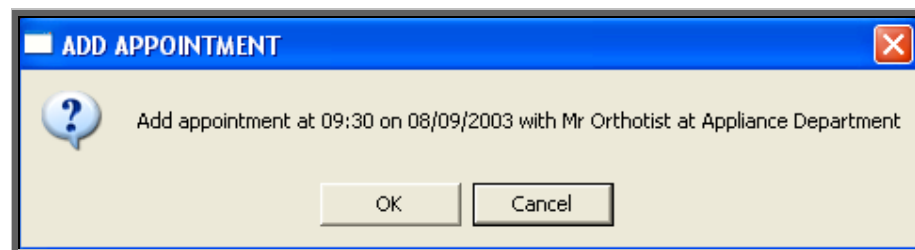
Having entered the date required you will be taken to that days diary page.

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 **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.

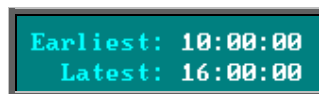
What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.

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)

<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.

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.

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

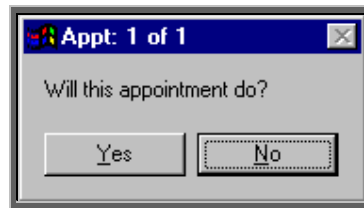


Find the relevant order using the 'find' icon (or Data, Find). (You can find the order in the **Patients** screen but if you have a lot of orders to book in it is much quicker this way)

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.

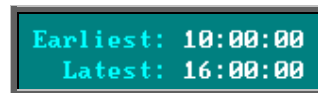


If you do wish to make another appointment or if there was no existing appointment for the patient you will be told the first available appointment based on the criteria entered on the order, i.e.

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

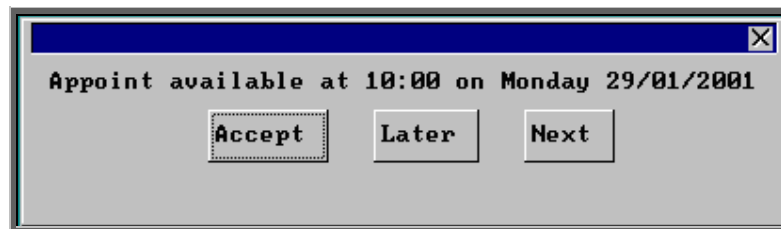
and also information held on the patient record

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.

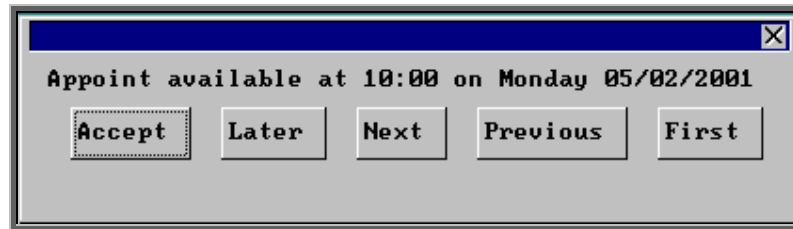
- **Accept.** If you are happy with the first date/time offered click on the Accept button with the mouse (or type **A**).
- **Later.** If you would like an appointment on the date offered but would like it later in the day click on the Later button with the mouse (or type **L**). If

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**).

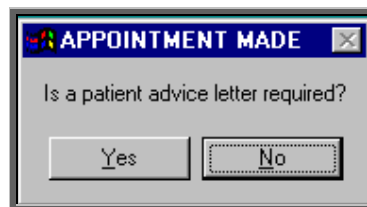
If you wish to abandon finding an appointment press **Esc**.

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



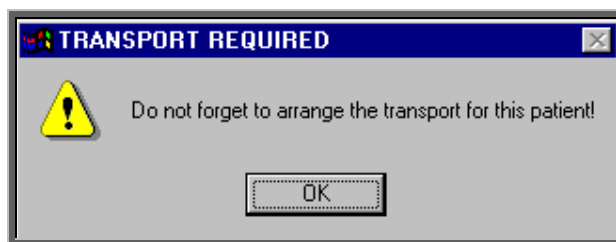
- **Previous.** Click on **Previous** (or type **P**) to go back to the previous date offered. (i.e. a backwards **Next**)
- **First.** Click on **First** (or type **F**) to go back to the First date/time that was offered.

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.


Sex		D O B	
M		10/Jun/1961	
Purchase	Order No	Cross Ref or	
24/05/1999	G00236	Hsp Ord No	
Progress	Date	Action	
	27/01/2001	I	
Received	27/01/2001	Appoint	01/02/2001
Supplied		status	In stock
Orthosis Code	ABC123		
Custom Footwear			
ACO A Time	15 minutes		

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

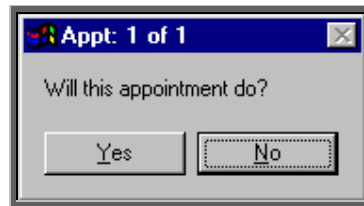
- | | |
|---|--|
| <i>Clinic</i> | select the clinic venue you wish to make the appointment for (from the pop-up list) |
| Clinician | if you have a preference as to which Clinician the patient is seen by then select a Clinician from the pop-up list. If the patient can see any Clinician that has a clinic 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. |
| <p>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.</p> | |
| 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](#))

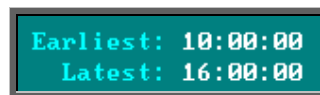
Duration will default to your standard appointment length (as set up in [Utilities – Choices – System](#)) but can be changed to the length of appointment required.

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.

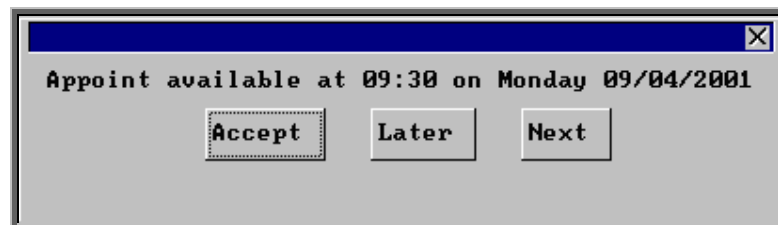


If you do wish to make another appointment, or if there was no existing appointment for the patient, you will be told the first available appointment based on the criteria entered in the appointment selection screen and the information entered in the *Earliest* and *Latest* fields on the patient record.



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.



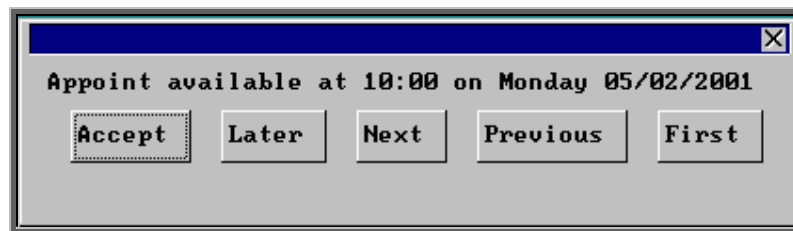
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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**).

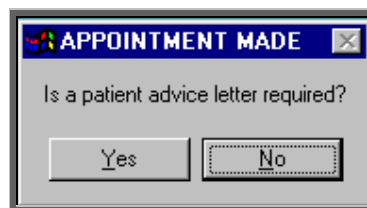
If you wish to abandon finding an appointment press **Esc**.

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](#))

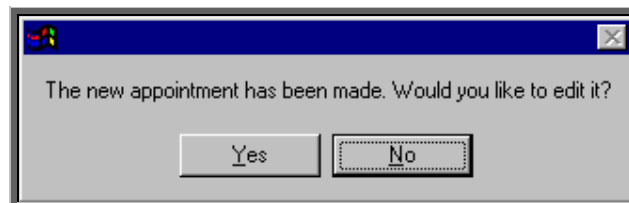
If the patient requires transport (i.e. the *Transport* field on the patient records is set to anything other than 'No Transport Required') you will be reminded that transport needs to be booked. Click on **OK** to continue.



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



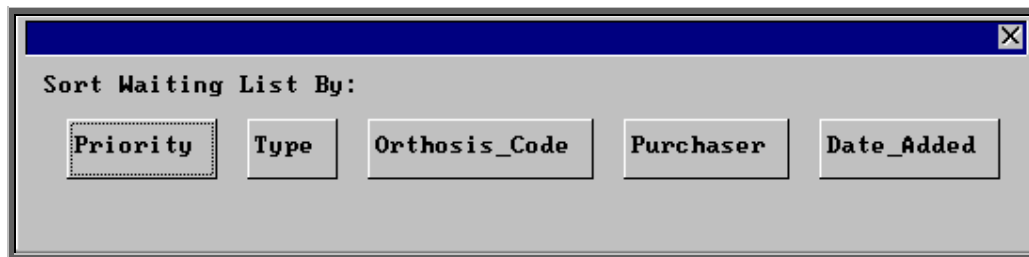
If you do not wish to edit the appointment, click on **No** and you will return to the patient screen. If you do wish to edit the appointment, click on **Yes** to be taken into the appointments screen, where you can make the necessary alterations.

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.

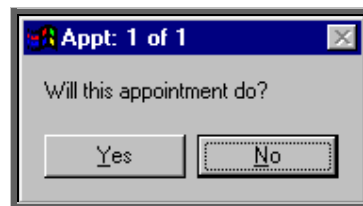
New This is where you can indicate whether the appointment is for a **New** patient, for a **Fitting**, a **Supply** or a **Review**. By entering this information ensures that the relevant field on the appointment screen is completed. This information is useful when reporting on appointment usage.

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](#))

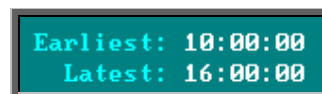
Duration will default to your standard appointment length (as set up in [Utilities – Choices – System](#)) but can be changed to the length of appointment required.

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.

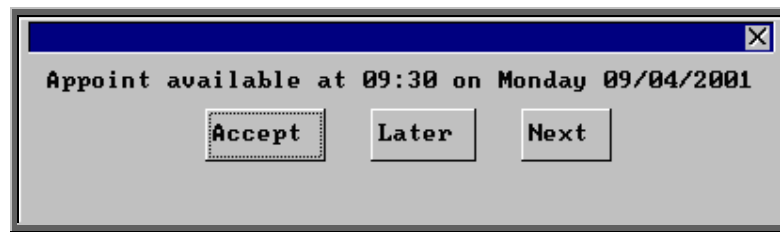


If you do wish to make another appointment, or if there was no existing appointment for the patient, you will be told the first available appointment based on the criteria entered in the appointment selection screen and the information entered in the *Earliest* and *Latest* fields on the patient record.



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.



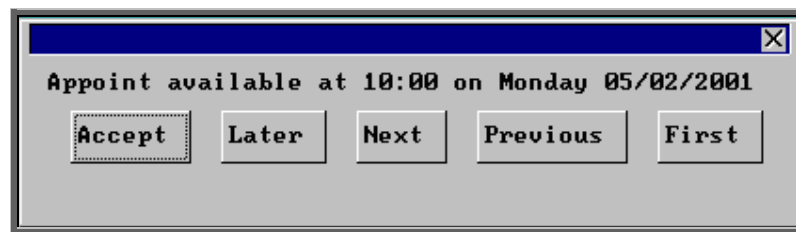
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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**).

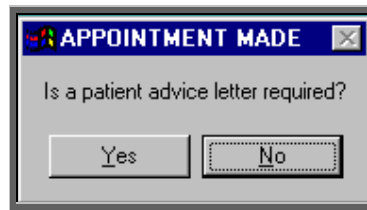
If you wish to abandon finding an appointment press **Esc**.

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](#))

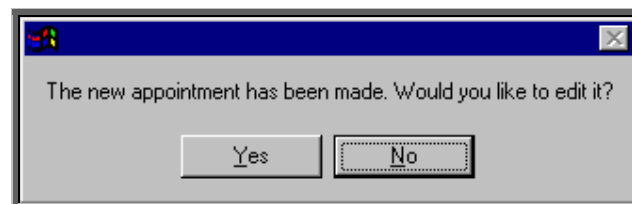
If the patient requires transport (i.e. the *Transport* field on the patient records is set to anything other than 'No Transport Required') you will be reminded that transport needs to be booked. Click on **OK** to continue.



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

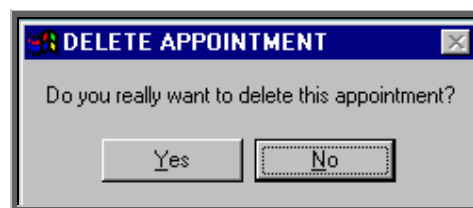
Finding the Appointment to be cancelled

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.

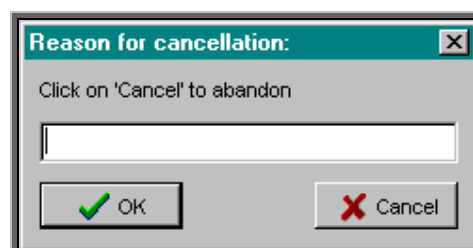
- a) **Patients.** Find the patient record and then click on the 'appointment' icon  (or Appointments, Current)
- b) **Appointments – Current – Sessions.** Go to the session the appointment is for and select Appointments, Maintain.
- c) **Appointments – Current – Appointments.** Find the appointment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

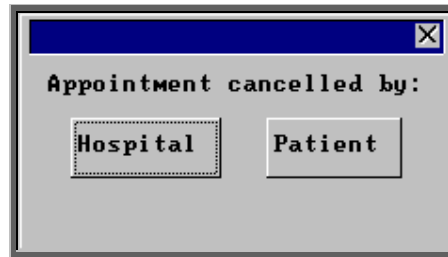


2. You will be asked to confirm that you do want to cancel the appointment. Click on **Yes** to continue. The appointment will be cancelled and the allocated time made available once more so it can be offered to other patients.
3. You will then be asked to enter the reason for cancelling.



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

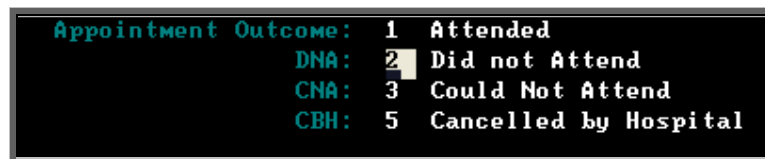
4. After you have entered the reason for the cancellation, you will be asked whether the Hospital or Patient cancelled the appointment.



- 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.



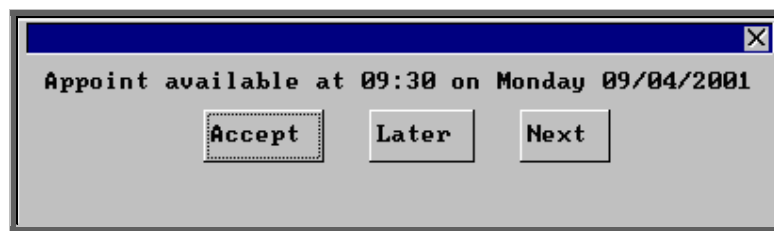
Warning. Cancelled appointments cannot be un-cancelled. If an appointment is cancelled be mistake you will need to make the appointment again.

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**).

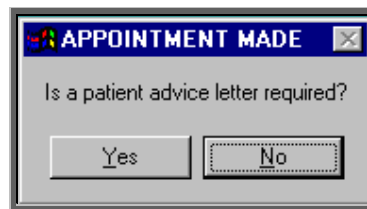
If you wish to abandon finding an appointment press **Esc**.

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](#))

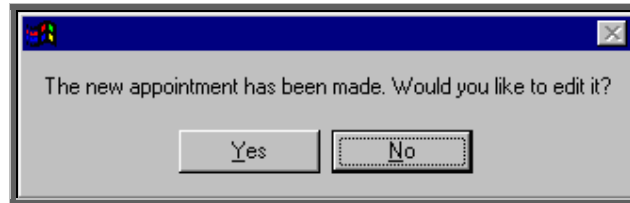
If the patient requires transport, you will be reminded that transport needs to be booked. Click on **OK** to continue.



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.

Outcome		Could Not Attend	
Created:	03/11/2003	By:	LINDA
Deleted:	03/11/2003	By:	LINDA
Reason:		Patient ill	

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

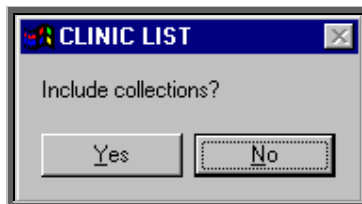
Clinic lists can be printed individually or in batch. The layout of the clinic list can be customised to suit your requirements, but there is a standard report already created for you.

Printing individual clinic lists.

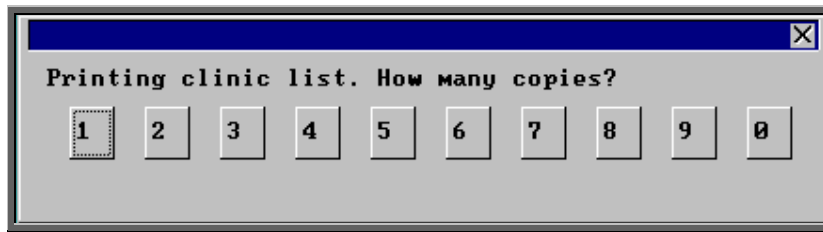
Menu: **Appointments – Current – Sessions**

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

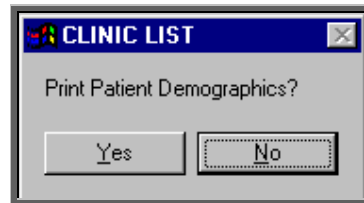
You will be asked if you wish those patients expected to collect items to be printed at the bottom of the clinic list (i.e. those patients who appear on the session screen as they have been notified to collect items)



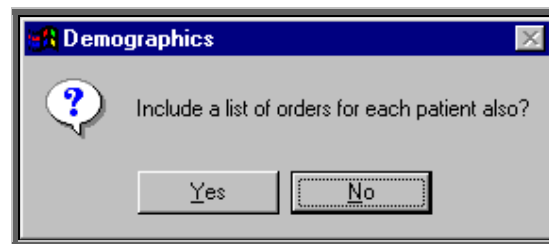
You can then select how many copies of the clinic list are required. If you wish to abandon printing the clinic list select 0.



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.

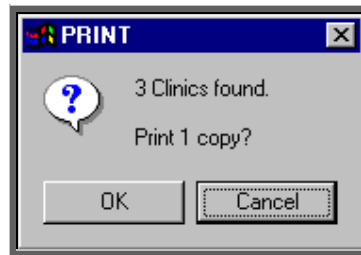


Printing clinic lists in batch.

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 **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](#))

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**pdate). Then select **Appointments – Print – Letters** and run **A**uto-print again.

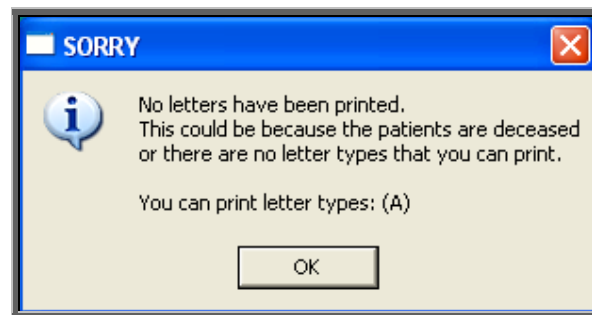
Option 2. Printing outstanding appointment/collection letters for a session.

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, Update) 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, Update) 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.

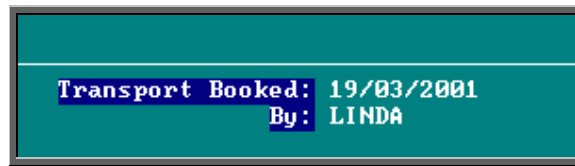
Option 1

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**.

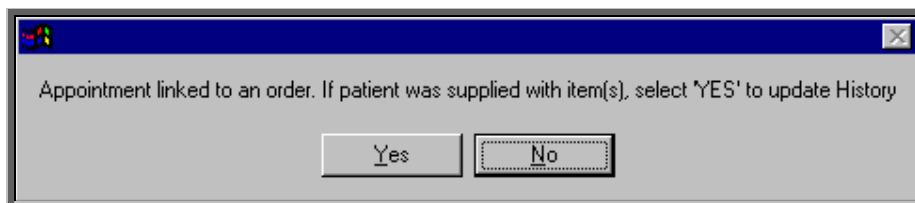
You will be taken straight into the *Outcome* field. A pop-up list will appear for you to select from.

The screenshot shows the OPAS software interface. At the top, there are labels for 'Order' and 'Supplier'. Below these, there is a 'Description:' field. To the right of the 'Description:' field is a table with two columns: 'Schedule' and 'Qty'. Below the table, there is an 'Outcome' field. To the right of the 'Outcome' field is a pop-up list with the following options: 'Attended', 'Did not Attend', 'Could Not Attend', and 'Cancelled by Hospital'. The 'Attended' option is highlighted in green. At the bottom of the screen, there are labels for 'Created: 31/10/2003', 'Deleted:', 'Reason:', and 'By:'. There is also a 'Remin' button on the right side of the screen.

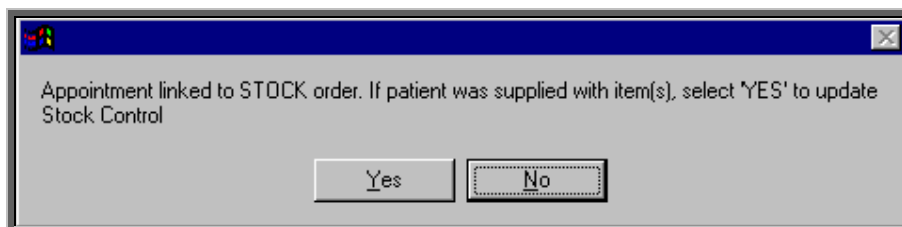
We have set four outcomes up for you to choose from; **Attended**, **Did not Attend**, **Could not Attend** and **Cancelled by Hospital**. You can set up more options if necessary in **Utilities – Choices – Appointment Outcome**.

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.

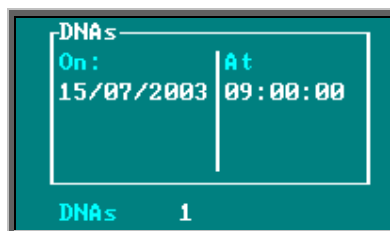


If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated



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.

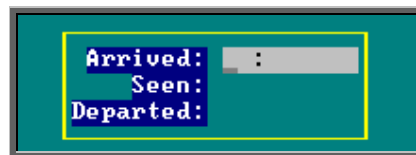
Arrived select to enter the time the patient arrived for their appointment. The current time will appear at the bottom of the screen. This can be amended if necessary, and press **Enter** to accept.

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.

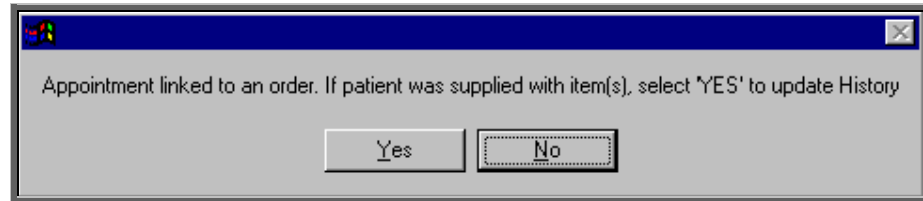


The cursor will move into the log box where you can enter the Arrived, Seen and Departed times. If you do not wish to enter a time in one of these fields, simply press the **Enter** key to move to the next field.

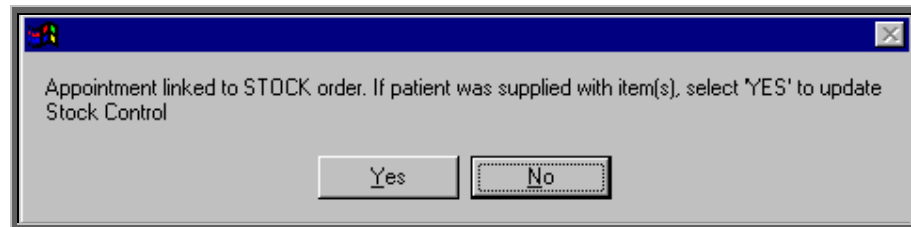
Once the Departed field has been entered, you will then be automatically taken to the next patient with an appointment at that clinic. Enter the

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 *Departed* or *All*), 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: **Utiilities – Choices – Appointment – Questions**


Click on the 'enter' icon  (**E**dit, **E**nter).

Question type in the question

Continue until all the questions have been entered.

2. Setting up the Responses

Menu: **Utiilities – Choices – Appointment – Responses**

Click on the 'enter' icon  (**E**dit, **E**nter).


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: **Utiilities – Choices – Appointment – Events**

Click on the 'enter' icon  (**E**dit, **E**nter).

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 dissapear 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.

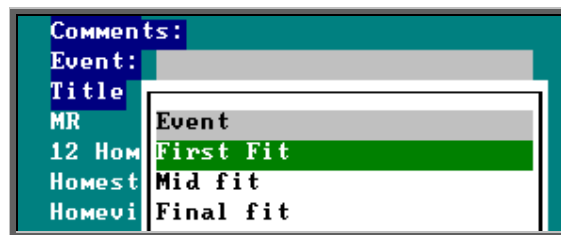
Click on the word Questions above the icons.

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

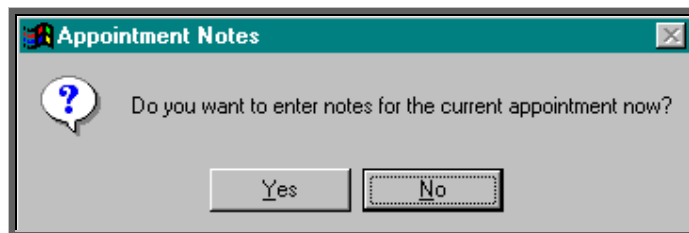
Response select all the relevant responses required for this question. When you have finished, press **Esc** to make the response pop-up list disappear and then press **Ctrl-Enter** to save.

4. Using the Event field

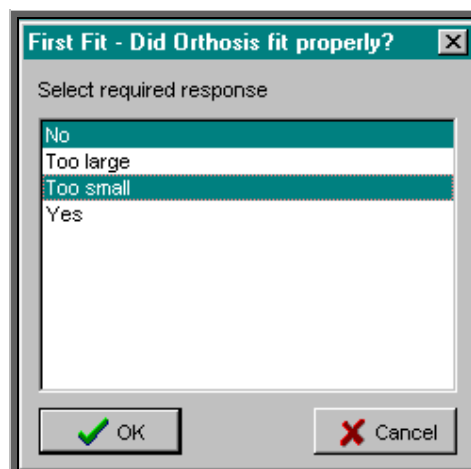
When making an appointment, select the appropriate *Event* from the pop-up list.



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 Audit above the icons and then selecting View.


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.

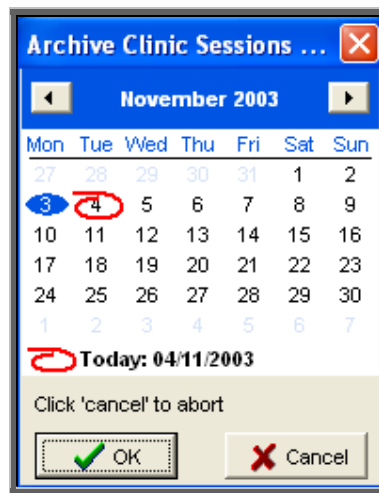
You must be the only user in OPAS when archiving sessions, so ensure everybody is logged off first. (**Utilities – Who** will tell you who is currently using OPAS)

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 Auto-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

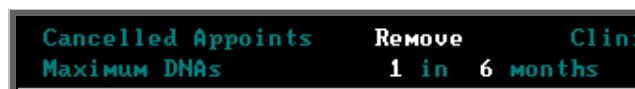
- how many DNA's a patient is allowed before a letter is sent

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.

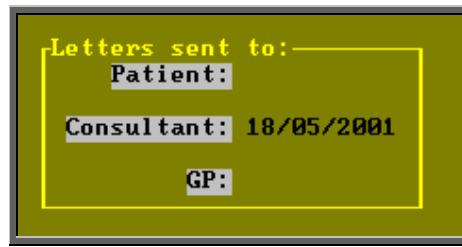
Follow the steps above to edit all the DNA letters you intend to use.

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.



Letters sent to:

Patient:


Consultant: 18/05/2001

GP:

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](#)).



Letter Type: A F P

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

Select whom the DNA letter is to be sent to.



Print Menu

All

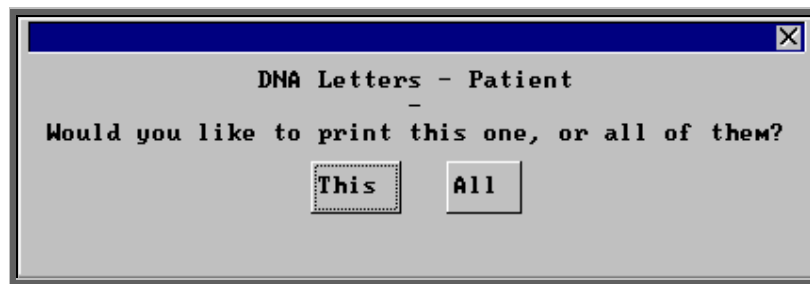
Referrer

GP

Patient

Quit

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](#)).

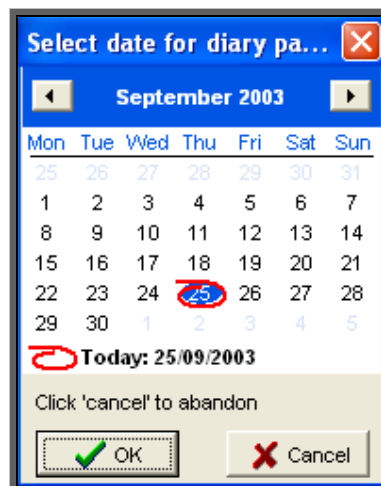
Once the DNA letters have been printed, today's date will be input next to whomever the letter was sent to (i.e. patient, referrer etc) in the *Letters sent to:* box.

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 BL
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).



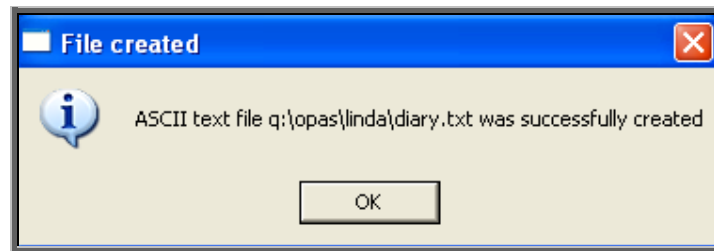
You have the option to print the report or send to a file for exporting into Lotus 123 or MS Excel

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.

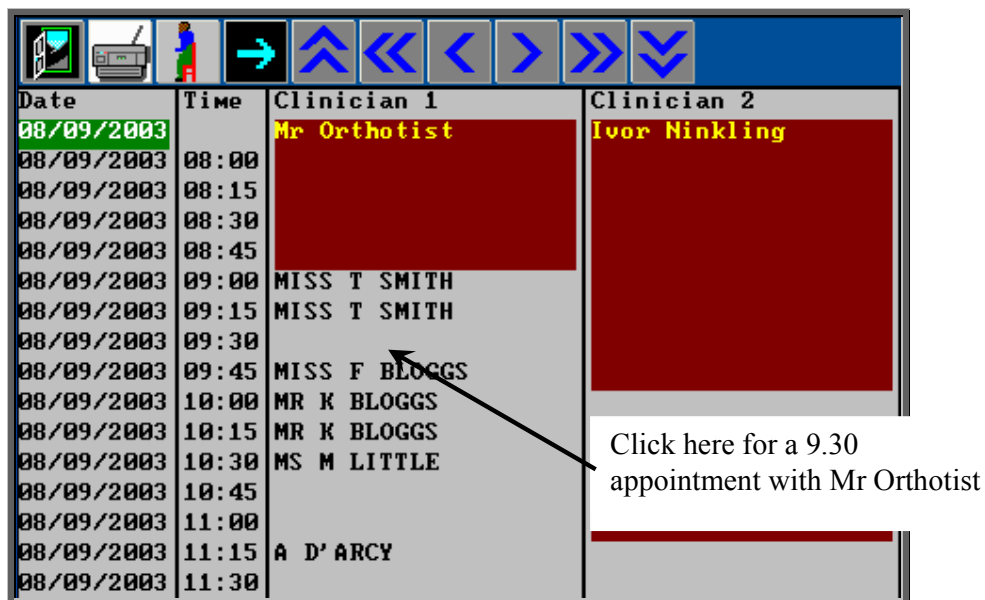
File


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.

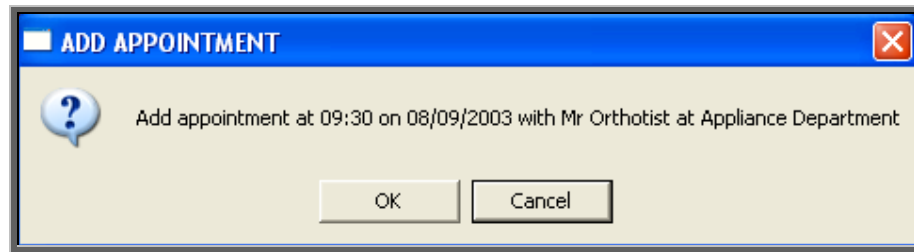
You will be able to see which appointments have been allocated, as these will contain the patient's name. The red area of the screen represents times outside the clinic hours, whereas the grey area is available for making appointments. Unlike making an appointment in the **Session** screen, you **cannot**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

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.

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

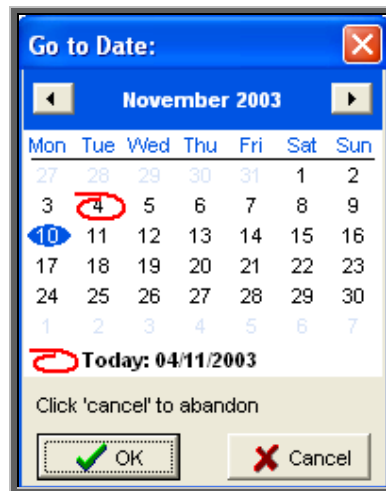
Use the cursor keys (**Right** & **Left**, **Up** & **Down**) to see further columns and rows.

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 (Clinics) 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

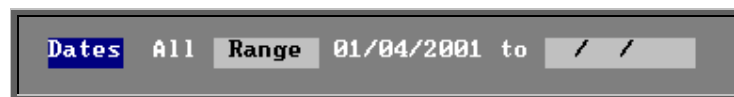
Select All if you want to report on all archived or current appointments

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**.



A screenshot of a software interface showing a menu with four options: 'Dates' (highlighted in blue), 'All', 'Range', and a date input field containing two slashes '//'. The menu is enclosed in a grey border.

Now type in the from date in the next space.



A screenshot of the same software interface as before, but now the 'Range' option is highlighted in blue. The date input field contains the text '01/04/2001 to' followed by two slashes '//'. The menu is enclosed in a grey border.

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](#)).

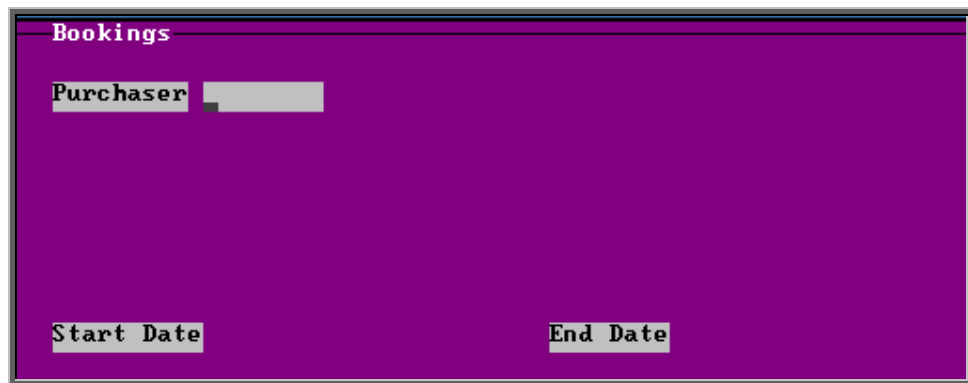
1. Bookings

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.

A screenshot of a software window titled "Bookings". The window has a purple background. At the top, the title "Bookings" is displayed in white. Below the title, there is a label "Purchaser" followed by a small grey rectangular input field. At the bottom of the window, there are two labels: "Start Date" on the left and "End Date" on the right, each followed by a small grey rectangular input field.

- 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

A screenshot of a "Print" dialog box. The window has a title bar with a close button (X). The text "Print 5 records" is displayed at the top. Below this text, there are three buttons: "Screen", "Printer", and "File". The "Screen" button is highlighted with a dashed border.

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.

- 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.

New User NHS Trust			Key :		0 - No Outcome recorded					
Orthotist Appointment Activity					1 - Attended					
ALL PURCHASERS					2 - Did not Attend					
Start Date: 01/01/2001					3 - Could Not Attend					
End Date: 30/07/2003					4 - Collect Only					
					5 - Cancelled by Hospital					
					6 -					
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.

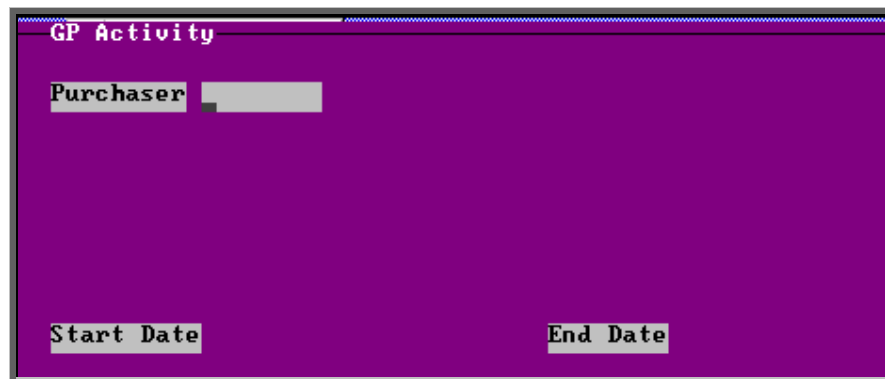
New User NHS Trust								0 - No Outcome recorded			
Directorate Appointment Activity				Key :				1 - Attended			
ALL PURCHASERS								2 - Did not Attend			
Start Date : 01/01/2001								3 - Could Not Attend			
End Date : 30/07/2003								4 - Collect Only			
								5 - Cancelled by Hospital			
								6 -			
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											

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 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 -					
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						
G3305708	BRACE CA	24	350		24						2
G3316902	HUSSAIN S	1	15		1						
G3355370	EYRE DH	1	15		1						
G3399279	WORTHINGTON JRM	1	15		1						3
G3399420	PENRICE GJ	1	15		1						
G3408120	DONALDSON TJ	1	15		1						
G8102216	MAITI 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	FLAXMAN PA	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		
AN Other	1						
Mr N Parrish	2	2					
Mr Smith	1				1		

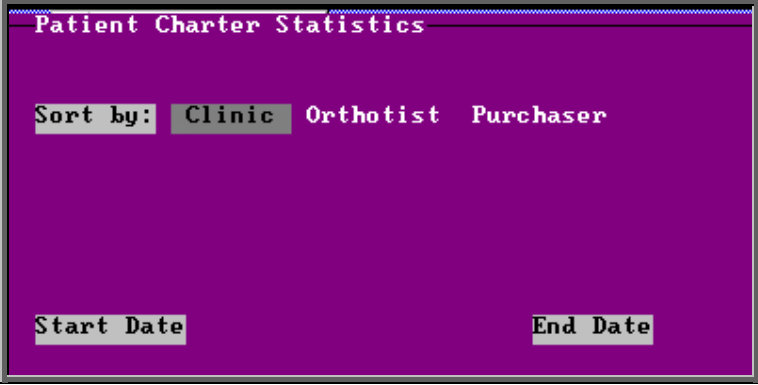
6. Patient Charter Stats

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.



The screenshot shows a window titled "Patient Charter Statistics". Inside the window, there is a "Sort by:" label followed by three buttons: "Clinic", "Orthotist", and "Purchaser". The "Clinic" button is highlighted. At the bottom of the window, there are two input fields labeled "Start Date" and "End Date".

- 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



The screenshot shows a dialog box titled "Print 5 records". It contains three buttons: "Screen", "Printer", and "File". The "Screen" button is highlighted with a dashed border.

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
Mr Orthotist	71	76	57	
Mrs Orthotiste	6	5	7	
Ivor Ninkling	1	3		
Mr 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**.

New User NHS Trust				Key : 0 - No Outcome recorded							
Consultant Appointment Activity				1 - Attended							
ALL PURCHASERS				2 - Did not Attend							
Start Date : 01/01/2001				3 - Could Not Attend							
End Date : 30/07/2003				4 - Collect Only							
				5 - Cancelled by Hospital							
				6 -							
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**.

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 -					
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										

Stock Control

- 1. Introduction**
- 2. Stock items**
- 3. Updating a stock item**
- 4. Deleting a stock item**
- 5. Issuing stock**
- 6. Raising a stock purchase order**
- 7. Amending a stock purchase order**
- 8. Cancelling a stock purchase order**
- 9. Booking goods in**
- 10. Entering invoice details**
- 11. Passing stock invoices for payment**
- 12. Stock transactions**
- 13. Low Stock**
- 14. Totals**
- 15. Stock Values Report**

1. Introduction

- a) Items may be held in stock rather than supplied direct from the supplier. Such items can be entered into the Stock Control section enabling you to
- be warned when stock is getting low
 - run reports to show what needs re-ordering
 - create purchase orders to replace stock
 - produce stock take reports showing quantity and value

There are five stock control systems. This is for hospitals that wish to be able to control and monitor stock held in more than one location. In effect, each stock control system acts as another supplier. It just happens that they are in the room next door (or at least quite close)!

We have already set up a supplier for Stock Control 1st System. The reference number is **888** and the supplier name is **STOCK**. If you want to use the 2nd, 3rd, 4th or 5th Systems you will need to create a new supplier in **Utilities – NSI – Suppliers**. Perhaps using reference number 777 for 2nd System and 666 for 3rd System etc. Then, when you are subsequently issuing stock to a patient, you will still create an order for the patient but rather than picking an external supplier in the *Supplier* field, you will select the appropriate Stock supplier. This will all be explained to you fully in the notes that follow.

- b) Each stock item is given a unique stock number (i.e. a code which no other stock item has and which also is not used for OPrice or NSI items) and, before it is entered into the Stock Control section, the

item **must** exist either in OPrice or NSI Items

and the supplier you buy the stock from **must** exist in OPrice or NSI Suppliers

and the price for that item from that supplier **must** exist in OPrice or NSI Prices

- c) You can create multiple entries in Stock Items for one item in OPrice: for instance, the OPrice item M007 (collar) could be entered in Stock Items as

STM007S (collar, small)
STM007M (collar, medium)
STM007L (collar, large)

It is good practice to have separate stock entries for different sizes, in this way, so that when you are warned that stock is getting low you will know which size needs to be re-ordered. Otherwise you need to physically check the stock to find which size is low.

2. Stock items

Menu: Stock Control – 1st System – Items

Each stock item is given a unique stock number (i.e. a code which no other stock item has and which also is not used for OPrice or NSI items) and, before it is entered into the Stock Control section, the

item **must** exist either in OPrice or NSI Items

and the supplier you buy the stock from **must** exist in OPrice or NSI Suppliers

and the price for that item from that supplier **must** exist in OPrice or NSI Prices

Orthotic Patient Administration System

File Edit Data Lowstock Sort Totals

Stock Items (1)

Stock No: LINDA

Schedule: M007 Collar in sponge rubber or other material

Supplier: 012 Halo Healthcare Ltd

Description: SPECIAL COLLAR

Orthosis Code: 999999 Other

UAT Rate: S **Location:** BIG BIN BY BACK DOOR

Minimum: 5 **Maximum:** 30 **Reorder:** 10

Key:
Received
On Order
Cancelled

Issues				Purchases	
Order:	Date:	Iss:	Ret:	Order No	Qty:
G00259	26/10/1999	11		OPENING27	15
				ST0013	10
				ST0015	10
				ST0019	10

Stock: 24 **Average:** £2.01 **Current:** £2.05

Value: £48.24 £49.20

Stock being given to patients i.e. **Issues**.

Replacement stock coming in i.e. **Purchases**. Orders outstanding are highlighted in green. Cancelled orders are highlighted in red.

Stock level and value of stock based on both current and average cost of the item

Each stock item shows a list of issues and purchases for that item, with transactions that are on order or cancelled shown in different colours, plus the current stock level and values.

Cost is the unit cost; *Value* is the value of the total stock of that item, i.e. *Cost* x *Stock*.

Purchase prices may change during the shelf life of a stock item: as each item is purchased, its purchase price is remembered by the system and the *Average* figures show the averages for the items currently in stock; the *Current* figures use the most recent purchase price.

Entering a new stock item

Menu: Stock Control – 1st System – Items

Before you begin to enter new stock items into OPAS it is important to make sure you have all the information at hand. Once you start using the stock item screen you will not be able to exit the screen until all the fields are completed. To ensure this, there is a form in Appendix 7B at the end of this chapter. If this form is completed first for each stock item you wish to add, then you will have all the information required. Appendix 7A shows some examples.



To add a new item, click on the 'enter' icon (or Edit, Enter) and you are first asked at the bottom of the screen for the stock number to be applied to this item:



This is a code, maximum 10 characters, allowing letters, numbers and dashes. The code must not be used for any other stock item, nor a code used in OPrice or NSI. To ensure that the code is not one used in OPrice or NSI, one idea might be to prefix each stock item code with **ST**. Take care when entering this code as it can not be amended later.

If you enter a code that is already being used, you will be told



and the entry will be abandoned. Try again, using a different code.

If the code is indeed unique, you are prompted to continue:



Click on **Yes** if you wish to continue. **DO NOT** continue if you are unsure

- whether the item exists in either OPrice or NSI Items
- whether the supplier you buy the stock from exists in OPrice or NSI Suppliers
- whether the price for that item from that supplier exists in OPrice or NSI Prices
- whether you have entered the stock code correctly (as this cannot be edited later)
- how many of the item you currently have in stock

Upon selecting **Yes**, you will be taken into the **Stock Item** screen to complete the fields below. The message **Price not found for this item / supplier** will appear on the screen, but the message can be ignored at this stage.

Schedule select the OPrice or NSI code for the item.

Supplier select the supplier you buy this item from.

If there is not a price within OPrice or NSI for the item from that supplier the warning message **Price not found for this item / supplier** remains and you are returned to *Schedule* to change either the code or the supplier. . As usual, you can press **Tab** to show the list of items and suppliers.

Warning. You cannot press **Esc** to abandon the entry at this stage, so you must make sure that you know the relevant item code and that the chosen supplier supplies the item. If you cannot get rid of the mismatch message, select an item and a supplier that you know definitely match (e.g. M007 for supplier 012) and finish the stock record for that item. Having finished entering the item you can then enter a price for the item in **Utilities – NSI – Prices** before returning to the **Stock Item** screen to amend the stock item to the correct item/supplier.

Once you have selected an item and a supplier which match (i.e. that supplier does supply that item), the warning message disappears and you are prompted for the *Description*.

Description is your description for the stock item and can be anything you like: it does not have to match the description held in OPrice. The *Description* will default to the *Description* of the stock item that was on the screen when you started to add the new item. This is to help cut down on the amount of typing when adding the same item several times with different sizes. Either edit the *Description* or press **F8** and type a new one.

Orthosis Code select the appropriate code from the list.

Vat enter the default vat rate for the item

S standard
E exempt
Z zero-rated
R reclaim.

Location If you have a large stock room you may wish to indicate where the item is stored.

Minimum enter the minimum stock level required. Items that are at or below this stock level are shown on the low order report for reordering.


Maximum enter the maximum stock of this item that you wish to hold.

Reorder this is the suggested minimum quantity to be ordered and will appear as a default quantity when you raise a purchase order for replacement stock.

You are then asked for the *Opening stock*. This is the stock you currently hold of this item. If you do not know, and cannot find out quickly how many are in stock, enter **0** (Zero) and correct the quantity later by doing a manual transaction ([see Stock Control - Note 12. Stock transactions](#))

3. Updating a stock item

Menu: Stock Control – 1st System – Items

Find the relevant stock item and then click on the ‘update’ icon  (or Edit, Update).

The *Stock No.* cannot be changed once created. If you do need to change the *Stock No.* you will have to create a new stock item and then delete the old stock item.

The following fields can be changed:

<i>Schedule</i>	<i>Location</i>
<i>Supplier</i>	<i>Minimum</i>
<i>Description</i>	<i>Maximum</i>
<i>Orthosis Code</i>	<i>Reorder</i>
<i>Vat Code</i>	

N.B. Amending your current stock level is achieved by adding a manual transaction ([see Stock Control - Note 12. Stock transactions](#))

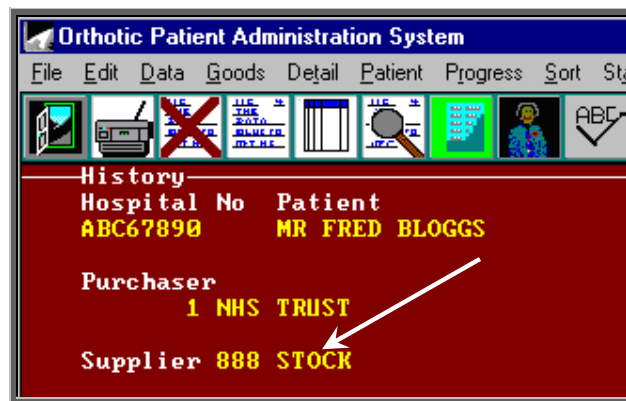
5. Issuing stock

Menu: Patients

When an item that you hold in stock is issued to patient you still need to add an order from the patient screen (as you would if you were having to order the item from a supplier - [see Orders - Note 2. Adding an order](#)).

However,

- when you reach the *Supplier* field you need to select the relevant stock system. If you are holding stock in just one location and therefore are only using 1st **System**, then this will be supplier (supplier code) 888 (supplier name) Stock.



- when you reach the *Code* field in the Details box you need to select the Stock No for the item (as set up in the **Stock Items** screen - [see Stock Control - Note 2. Stock items](#)) and not the OPrice/NSI schedule code for that item.

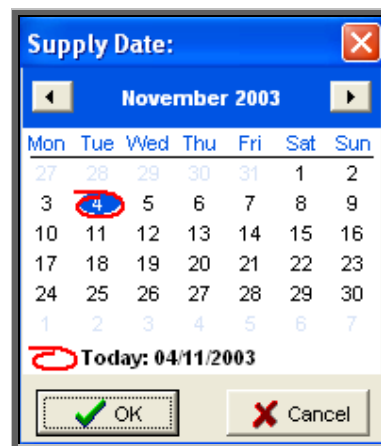


- when you press **Ctrl-Enter** to finish entering the order you will be asked if you wish to update the Stock Control system.



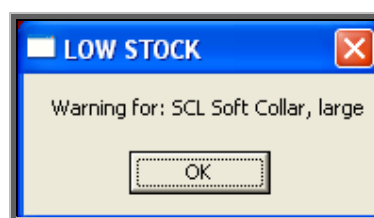
If you select **No**, stock control will not be updated and the *Status* of the order will show as 'On order'. If you subsequently revisit the order and mark the order as being supplied (by clicking on Goods, Supplied at the top of the **Orders** screen) the *Status* of the order will change to 'Supplied' and stock control will be updated then.

If you select **Yes**, you will then be asked to select the date the goods were supplied. Today's date will highlighted but this can be changed if necessary. (Press **Cancel** here if you wish to abandon updating stock control.)

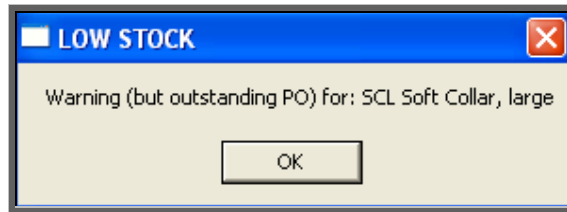


The date entered here will be placed in the *Supplied* field, the *Status* of the order will show as 'Supplied' and the stock control system will be updated by reducing the amount held in stock.

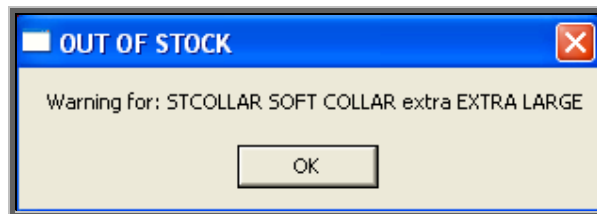
If the stock control system sees that you are below minimum level on that stock item, the following warning message will appear so that some more can be ordered.



If the stock control system sees that you are below minimum level on that stock item but that a stock purchase order has been raised, the following warning message will appear.




If the stock control system sees that you are out of stock on that stock item, regardless of whether there is an outstanding purchase order or not, the following warning message will appear.



6. Raising a stock purchase order

Menu: Stock Control – 1st System – Purchases

It is within the **Purchases** section of **Stock Control** that purchase orders are raised for ordering replacement stock. This is also where goods are marked as received and invoice details entered.

To raise a stock purchase order, click on the 'enter' icon  (or Edit, Enter).

<i>Date</i>	shows as today but can be changed if required.
<i>Order No</i>	the next order number in sequence shows, but can be changed if required.
<i>Supplier</i>	is selected from the list of suppliers.
<i>Invoice</i>	at this stage the supplier's invoice has not been received, so leave this blank.

- Dated* if *Invoice* has been left blank, this is bypassed
- Call Off* If a call off number has been entered in the *Blanket* field of the Supplier record (**Utilities – Choices – Suppliers**), it will appear here automatically. You can however, enter a call off number manually if necessary.
- Stock no* select from the list of items. If the stock item selected is not set up within **Stock Control – 1st System – Items** as being purchased from the supplier selected above then the following message will appear at the bottom of the screen:



Press any key to remove the error message and then either change the stock item or, by using **F3**, move back to the supplier field and change the supplier.

If the item valid for the supplier selected, then the *Description*, *Orthosis Code*, (*Vat code* and *Each* (i.e. Cost each) will be filled in for you.

Qty shows as the reorder quantity on the stock item record, but can be changed if required.

Total is calculated for you (*Each x Qty*).

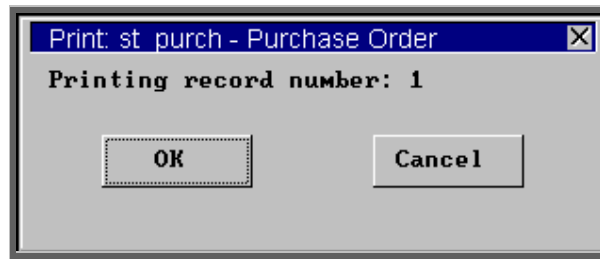
You will then be taken onto the next line so that the next item can be selected. When you have finished entering items, press **Esc** to remove the stock item pop up menu, and then **Ctrl-Enter**.

When the order is first raised, the lines on the order will be **highlighted in green** to indicate that they are on order. The green highlight will be removed when you subsequently inform OPAS that the goods have been received.

Printing the stock purchase order




To print the order, click on the 'print' icon (or **File, Print**) and select **Purchase Order** from the drop down menu.



OPAS will confirm which stock order it will print. Click on OK to continue.

7. Amending a stock purchase order

Menu: Stock Control – 1st System – Purchases

Find the relevant purchase order and then click on the ‘update’ icon  (or Edit, Update).



All the fields can be changed as required; extra items can also be added if they have been missed off the order. Lines can also be deleted from the order by moving down to the relevant line and pressing **Ctrl-F8**.

8. Cancelling a stock purchase order

Menu: Stock Control – 1st System – Purchases

So that the order shows as cancelled in the stock **Purchases** screen and **Items** screen, you need to cancel the order lines individually.

Find the relevant purchase order and then click on **Items** at the top of the screen. You will now see an **Items** screen for each line that is on the order. If there is more than one line on the order, move forwards and backwards through the **Items** screens using

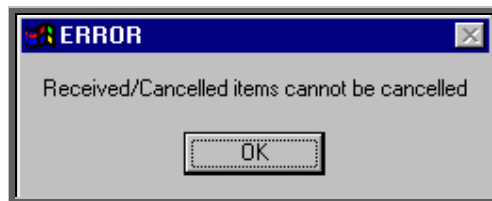
the ‘arrow’ icons  and  (or **F6** and **F5**).

Once you are looking at the line that you wish to cancel, click on the 'delete' icon



(or Cancel).

You cannot cancel lines if the goods have been received (or if you have previously cancelled them).



Once the line has been cancelled, the *Status* field on the **Items** screen will show as **Cancelled** and when you return to the main purchase order screen (by pressing **Esc**,



clicking on the 'exit' icon or File, Return) the lines that you have cancelled will be **highlighted in red**.

Also, when you next go into **Stock Control – 1st System – Items** the order number will be highlighted in red so that you can see from that screen too that the line has been cancelled.

Issues				Purchases	
Order:	Date:	Iss:	Ret:	Order No	Qty:
G00123	20/10/1997	13		OPENING12	12
G00192	27/10/1998	2		ST0009	20
G00199	13/01/1999	1		ST0014	10
				ST0017	10


9. Booking goods in

Menu: **Stock Control – 1st System – Purchases**

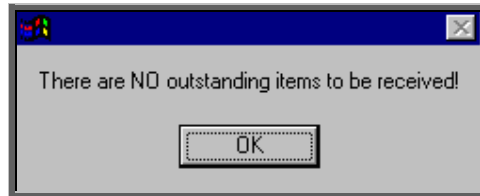
When the goods arrive you need to return to the purchase order and book the goods in so that Stock Control knows that they are now in stock and available.

You have the ability to book the whole order in, the remaining outstanding items or individual lines.

a) Booking in the whole order/remaining outstanding items

Find the purchase order and then click on the 'receive icon'  (or Recieve).

This will mark all outstanding items on the order as being received. If all the items have already been booked in (i.e. there are no order lines highlighted in green) you will get the following message.



Once items have been marked as received

- the date they were received will be entered in the *Received* field (to the right of the *Total* field) N.B. This may not be visible to some of you without moving to the right of your screen with the right arrow key on your keyboard.
- they will no longer be highlighted in green.

b) Booking in individual lines

Find the purchase order and then click on the word Items at the top of the screen.

You will now see an Items screen for each line that is on the order. If there is more than one line on the order, move forwards and backwards through the Items screens

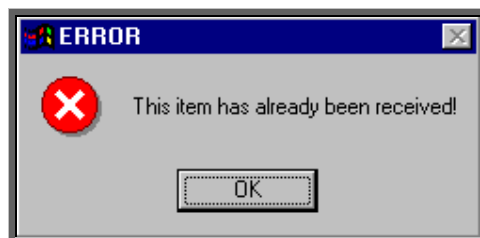
using the 'arrow' icons  and  (or **F6** and **F5**).

Once you are looking at the line that you wish to book in click on the 'receive icon'




(or Recieve).

If the line has already been booked in the following message will appear.



Once the line has been received

- the *Status* field on the **Items** screen will show as **Received**
- the *Received* field will show today's date
- the *By* field will show who booked the goods in


and when you return to the main purchase order screen (by pressing **Esc**, clicking on the 'exit' icon  or **File**, **Return**)

- the date the lines were received will be entered in the *Received* field (to the right of the *Total* field) N.B. This may not be visible to some of you without moving to the right of your screen with the right arrow key on your keyboard.
- the lines that you have booked in will no longer be highlighted in green.

10. Entering invoice details

Menu: **Stock Control – 1st System – Purchases**

When you receive an invoice from the supplier for the stock, the purchase order can be updated to show those invoice details.

Find the relevant purchase order and then click on the 'update' icon  (or **Edit**, **Update**).

Invoice move down (by pressing **Enter**) to the *Invoice* field and type in the Invoice Number.

Dated type in the invoice date. It will default to today's date, but this can be changed.

Check that the information is correct in the items box. You can change **Stock No.**, **Qty** and add additional lines if required. If the details are correct, move the cursor down the **Stock No:** column (with the down arrow key on the keyboard) until you reach the first blank line. Press **Esc** to remove the pop up list of **Stock Nos:** and then press **Enter** to move to the *Discount:* field.

Discount enter any discount that you may have received on the invoice.

Postage enter charges made for postage and/or packing if any, and then press **Ctrl-Enter** to finish.

11. Passing stock invoices for payment

Once the **Purchases** screen has been updated with invoice details the next step is to pass the invoices for payment. There are two purposes for doing this:

1. To produce a report listing those invoices that are being passed for payment.
2. To mark the invoices with today's date so that you know when the invoice was passed on to you Finance Department for payment.

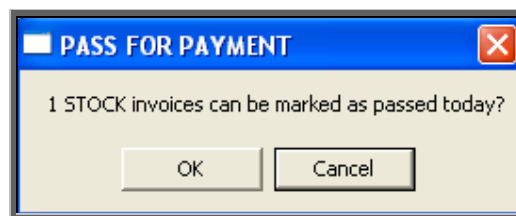
Menu: **Stock Control – 1st System – Purchases**



Click on the 'print' icon (or File, Print) and select **Pass for payment**.

The system will then find those invoices that can be passed to the accounts department for payment (i.e. those invoices that have an invoice date entered and that have not been passed already) and prints a list of those invoices. As with all reports, the layout of this list can be modified if required.

You are then asked to confirm that these invoices should be marked as passed for payment:



If you select **OK**, those invoices printed on the list will be marked as passed for payment by inserting today's date in the *Paydate* field on the **Purchases** screen.

Stock Purchases (1)

Date 13/03/1997 Order No ST004

Supplier 012 Halo Healthcare Ltd
Prescott House
Bridge Industrial Estate
Speke Hall Road
Liverpool

Invoice 5453
Dated: 29/09/2003
Call off

Key
Received
On Order
Cancelled

Stock No:	Description	Orth Code	U	Each:	Qty:
SCL	Soft Collar, large	999999	S	£39.20	10

Lines: 1 Items: 10 Value: £392.00
Discount:
Postage: + VAT
UAT: £68.60
Grand: £460.60

Passed: 29/09/2003


If you select **No**, those invoices will not be marked as passed and will appear on the report again the next time **Pass for payment** is run

12. Stock transactions

Menu: Stock Control – 1st System – Transactions

Whenever a stock transaction takes place (i.e. by the issuing of items to patients or the purchasing of stock), a transaction record is automatically created that can be viewed here.

There are times, however, when the need arises to raise a transaction manually. For instance, during stock take when a difference is noted between the number shown on the system and the number actually in stock or for moving stock between Stock Control Systems (i.e. from 1st System to 2nd System)

To create a manual stock transaction, click on the 'enter' icon  (or Edit, Enter).

Stock No: enter the Stock No that you need to raise a transaction for (pressing **Tab** will show a list to select from

Iss: this means issue, i.e. reducing the number in stock. Type the number of items issued or the number by which the stock is to be reduced by.

Ret: this means return, i.e. increasing the number in stock. Type the number of items received or the number by which the stock is to be increased by.

Iss: and Ret: are alternatives: do not type a number into both of them!

Date: enter the date of the transaction. **F2** will enter today's date.

The following fields may or may not be relevant: e.g. if the change is due to a stock check, there is no particular patient or order, so these fields can be left blank

Purchaser: select from the list or if not relevant, press **Esc** and then **Enter**

Referrer: select from the list or if not relevant, press **Esc** and then **Enter**

Patient: if relevant, press **Tab** and select from the list, otherwise press **Enter**

Order: if relevant, press **Tab** and select from the list, otherwise press **Enter**

A new blank transaction screen will appear. If you have no more transactions to enter then press **Esc**.

Alternatively, press **Ctrl-Enter** to save and exit the screen at any point after the *Date:* field.

13. Low stock

Menu: Stock Control – 1st System – Items

This prints a list of stock items that are at or below the minimum stock levels. A separate page will be produced for each supplier to make purchasing of replacement stock easier.

To produce the report, click on Lowstock at the top of the screen.



You can then look at the information on the screen, send it to the printer or produce a file to export into another application.

New User: NHS Trust						
Stock (1) at or below minimum level for:						
234						
Stock No:	Schedule:	Stock:	Minimum:	Maximum:	Reorder:	On Order
Description:						
ESK05	SK	0	2	5	2	
SK KNEE BRACE MED						

14. Totals

Menu: Stock Control – 1st System – Items

This shows the total cost of your current stock, both averaged over the actual historical purchase prices and the replacement cost (i.e. using the current purchase prices). It will also show the number of items below minimum and above maximum levels.



Click on the 'totals' icon (or Totals), and the information will be displayed on the screen.

Totals Results	
Average Cost	£1,802.14
Replacement Cost	£1,229.74
Items below minimum	3
Items above maximum	6

This can be printed by pressing **Alt-P**.

15. Stock Values Report

Menu: Stock Control – 1st System – Items

The stock values report will show for each stock item

- the quantity currently in stock
- the value of the stock item (based on the price paid)
- the cost of replacing the stock item (based on current price)



To run the report click on the 'print' icon (or File, Print) and select **Custom Report** from the drop down menu.

Click on the word This_view at the top of the screen to show those reports that can be run from this screen.

Highlight ST_VALUE and click on Run.

A print box will appear in the middle of the screen offering to send one copy to the printer. You can amend the number of copies required or select the information to be sent to the screen instead here. To proceed, click on OK.

Stock No:	Description:	Qty:	Cost :	Replace:
SCL	Soft Collar, Large	38	£205.58	£77.90
SCM	SOFT COLLAR MEDIUM	44	£111.32	£90.20
SCXL	SOFT COLLAR EXTRA LARGE	26	£69.42	£53.30
MECM	MEDIUM SOFT COLLAR	32	£91.84	£65.60
A000001	ERYERYERUGH	3	£875.34	£886.14
BSK03	SK KNEE BRACE SMALL	3	£69.00	£0.00
BSK05	SK KNEE BRACE MED	0	£0.00	£0.00
AP08L	Post Op Slipper Large	2	£6.00	£0.00
AP08M	Post Op Slipper Medium	12	£36.00	£0.00
LINDA	SPECIAL COLLAR	24	£48.24	£49.20
OCB10M	ANALOG H/A	6	£282.00	£0.00
SCS	Surgical Collar Small	4	£7.40	£7.40
SCXL		16	£0.00	£0.00
Grand Total			£1,802.14	£1,229.74

EXAMPLE

[illegible]

Appendix 7b – Stock Items

[illegible]

Mobility

Mobility deals with the administration of wheelchair and similar services: it is under development and this chapter of the manual will be available on its completion.

Reports

- 1. Introduction**
- 2. Appointments Reports (Ad hoc)**
- 3. Appointments Reports (Batches)**
- 4. Appointments report – Bookings**
- 5. Appointments report – Clinician**
- 6. Appointments report – Directorate**
- 7. Appointments report – GP Activity**
- 8. Appointments report – New Patients**
- 9. Appointments report – Patient Charter Stats**
- 10. Appointments report – Referrer**
- 11. Appointments report – Reviews**
- 12. Appointments report – Transport**
- 13. Appointments report – Uncollected**
- 14. Appointments report - Venues**
- 15. Financial Reports (Ad hoc)**
- 16. Financial Reports (Batches)**

- 17. Financial report – Activity**
- 18. Financial report – Clinician**
- 19. Financial report – Clinics**
- 20. Financial report – Cost Code**
- 21. Financial report – Creditors**
- 22. Financial report – Debtors**
- 23. Financial report – Directorate**
- 24. Financial report – GPs**
- 25. Financial report – Graphs**
- 26. Financial report – Invoices**
- 27. Financial report – Orders**
- 28. Financial report – Payments**
- 29. Financial report – Profit**
- 30. Financial report – Progress**
- 31. Financial report – Purchases**
- 32. Financial report – Quarterly**
- 33. Financial report – Received**

- 34. Financial report – Reclaim VAT**
- 35. Financial report – Referrers**
- 36. Financial report – Returns**
- 37. Financial report – Schedules**
- 38. Financial report – Statements**
- 39. Financial report – Supplier Spend**
- 40. Financial report – Wards**
- 41. Financial report – Workshop**
- 42. Financial report – YTD (Year to Date)**
- 43. Patients Reports (Batches)**
- 44. Patients report – Amputee**
- 45. Patients report – Ethnicity**
- 46. Patients report – Registered**
- 47. Prescriptions Reports (Batches)**
- 48. Prescriptions report – Charges**
- 49. Prescriptions report – Expired**
- 50. Prescriptions report - New**

1. Introduction

In **Reports** we can retrieve the data that has been entered into OPAS. Like any database, the information that we can get out is only as good as the information that is put in. For example, if you want to know how many of your appointments Did Not Attend, then OPAS can only tell you this if you have updated the sessions after the clinic to record who did and did not attend. Similarly, you can only find out the value of goods received over a particular period of time if the goods have been booked in on the order.

There are a lot of reports available, covering appointments, orders, patients and prescriptions. The majority of the reports are analysing information entered on the orders, because not only do we want to know how much has been spent, but we want to know who we spent it with (Supplier), on what type of appliance (Orthosis code) and which part of the hospital (Directorate) created the expense.

The **Reports** module is split between **Appointments** reports, **Financial** reports, **Patients** reports and **Prescriptions** reports. Within appointment and financial reports we can select **Ad-hoc** or **Batches**. Ad-hoc gives you the flexibility to specify particular information that you are interested in, whereas Batches contains pre-set report templates. When first using reports, you will find running the batch reports easier. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance.

Most reports, as well as being able to send to the printer, can be seen on screen or saved as a file. Reports saved as files can then be e-mailed to other departments or exported into spreadsheets.

Users of OPAS have requested all the reports in OPAS. If there is a report currently not in OPAS that you require, please let us know. All new reports are included in future versions of OPAS so that everyone benefits.

Finally, and I cannot stress this enough, the format of the printed report can be tailored to suit your requirements. Just like your order and letters layouts were customised when you first started using OPAS, so can your reports. So, if you print a report and it shows the patient's hospital number and you would rather see the patient's name, or if the value of the order is showing net cost and you need gross or if the report is in date order and you want it to be in supplier order, then please let us know and we can change the report for you.

2. Appointment 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**.



A screenshot of a software interface showing a menu titled 'Dates'. The menu has two options: 'All' and 'Range'. The 'Range' option is currently selected and highlighted.

Now type in the from date in the next space.



A screenshot of the same 'Dates' menu, but now the 'Range' option is selected, and a date '01/04/2001' is entered in the space to the right of the menu. The text 'to' is also visible, indicating a date range.

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.

3. Appointments Reports (Batches)

Menu: Reports – Appointments – Batches or

Menu: Appointments – Print – 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](#)).

4. Appointments report – 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

5. Appointments report – 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.

- 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.

New User NHS Trust		Key :		0 - No Outcome recorded						
Orthotist Appointment Activity				1 - Attended						
ALL PURCHASERS				2 - Did not Attend						
Start Date : 01/01/2001				3 - Could Not Attend						
End Date : 30/07/2003				4 - Collect Only						
				5 - Cancelled by Hospital						
				6 -						
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 Huseni	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										

6. Appointments report – 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 [dropdown arrow]

Directorate: [dropdown arrow]

Start Date [text box] **End Date** [text box]

- 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



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.

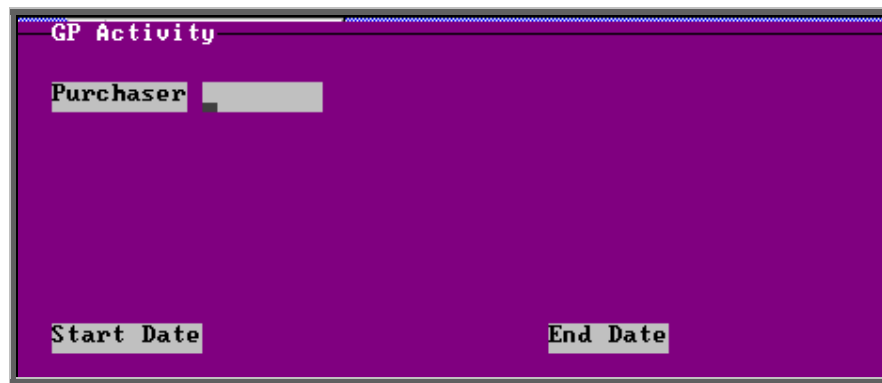
New User NHS Trust Directorate Appointment Activity ALL PURCHASERS Start Date : 01/01/2001 End Date : 30/07/2003				Key :							0 - No Outcome recorded
											1 - Attended
											2 - Did not Attend
											3 - Could Not Attend
											4 - Collect Only
											5 - Cancelled by Hospital
											6 -
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										

7. Appointments report – 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.



The form is titled "GP Activity" and has a purple background. It contains three input fields: "Purchaser" at the top left, "Start Date" at the bottom left, and "End Date" at the bottom right.

- 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



A dialog box titled "Print 5 records" with a close button (X) in the top right corner. It contains three buttons: "Screen", "Printer", and "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 GP Activity Report.

New User: NHS Trust GP Appointment Activity Report 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 -					
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						
G3305708	BRACE CA	24	350		24						2
G3316902	HUSEAIN S	1	15		1						
G3355370	EYRE DH	1	15		1						
G3399279	WORTHINGTON JRM	1	30		1						3
G3399420	FENRICE GJ	1	15		1						
G3408120	DONALDSON TJ	1	15		1						
G8102216	MAITI SK	3	45		3						
G8203801	JONES IP	4	60		4						
G8409872	SCHUMM BA	2	20		2						
G8510251	FERKINS PJ	1	15		1						
G8706074	DAVIDSON RG	7	120		7						
G8800576	FLAJMAN BA	1	15		1						
G8901446	YOUNG S	16	240		14	1	1				

8. Appointments report – 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.

- 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 OP	Attended IP	Attended Other	DNA OP	DNA IP	DNA Other
Mr Surgeon	3	1		1	1		
Mr N Other	1						
Mr N Parrish	2	2					
Mr Smith	1				1		

9. Appointments report – 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.

Patient Charter Statistics

Sort by: **Clinic** Orthotist Purchaser

Start Date End Date

- 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

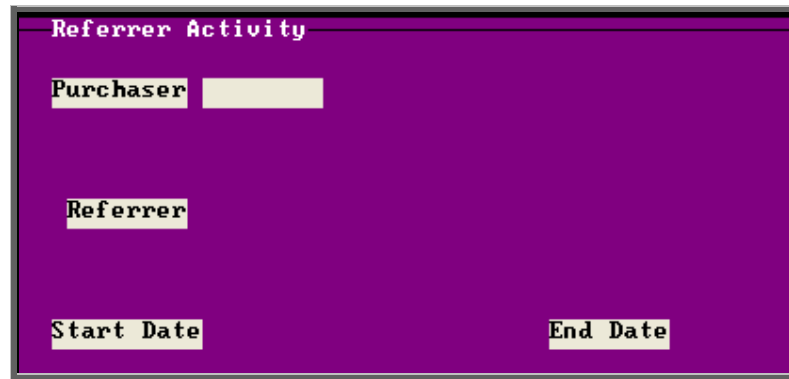
Those appointments that do not have 'seen' times logged

10. Appointments reports – Referrer

Menu: Reports – Appointments – Batches – Referrer or

Menu: Appointments – Print – Reports – Batches – Referrer

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 **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.

New User NHS Trust				Key : 0 - No Outcome recorded							
Consultant Appointment Activity				1 - Attended							
ALL PURCHASERS				2 - Did not Attend							
Start Date : 01/01/2001				3 - Could Not Attend							
End Date : 30/07/2003				4 - Collect Only							
				5 - Cancelled by Hospital							
				6 -							
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											

11. Appointments report – Reveiws

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 OP	Attended IP	Attended Other	DNA OP	DNA IP	DNA Other
Paediatrics	2	1			1		
PCT	2	2					
Trauma & Orthopaedic	15	13			1		

12. Appointments report – 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

13. Appointments report – 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 DALNOEY	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**.

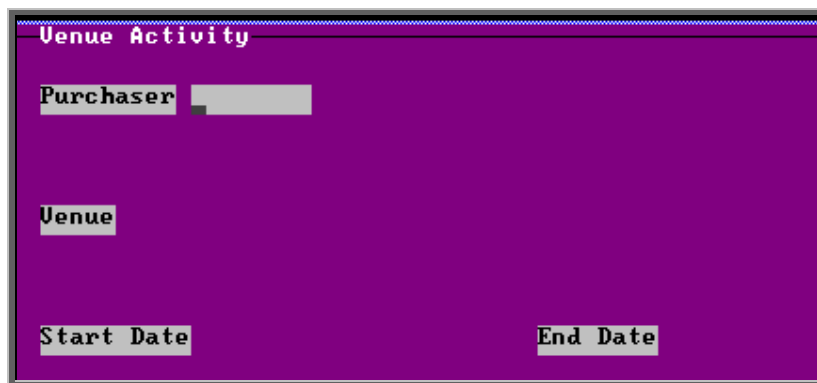
Note: If you wish to edit the wording of the reminder collection letter the template is held within **Utilities – Choices – Letters** and is called **Uncoll**.

14. Appointments report - 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.

A screenshot of a report form titled "Venue Activity". The form has a purple background. It contains four input fields: "Purchaser" (with a dropdown arrow), "Venue", "Start Date", and "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 **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.

New User NHS Trust			Key :		0 - No Outcome recorded					
Directorate Appointment Activity					1 - Attended					
ALL PURCHASERS					2 - Did not Attend					
Start Date : 01/01/2001					3 - Could Not Attend					
End Date : 30/07/2003					4 - Collect Only					
					5 - Cancelled by Hospital					
					6 -					
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										

15. Financial Reports (Ad Hoc)

Menu: Reports – Financial – Ad hoc or

Menu: History - Reports

The **Ad hoc** report gives you the flexibility to report on specific order information by completing the selection criteria screen below appropriately.

OPAS Reports Selection Criteria Screen

Purchaser	No	Yes	One	Range	
Directorate	No	Yes	One	Range	
Referrer	No	Yes	One	Range	
Orthosis Code	No	Yes	One	Range	
Supplier	No	Yes	One	Range	
GP	No	Yes	One	Range	
Post Code	No	Yes	One	Range	
Dates	All	One	Range		
Using	Ordered	Received	Supplied	Invoiced	Purchase_Invoice Paydate
Continue? No Yes					

Purchaser

- Select No if all Purchasers are to be included in the report but you **do not** require a sub-total for each Purchaser
- Select Yes if all Purchasers are to be included in the report and you **do** want a sub-total for each Purchaser. Use the space bar on your keyboard to move the highlight from **No** to **Yes**
- Select One if only one Purchaser is to be included on the report. Use the space bar on your keyboard to move the highlight from **No** 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.

Purchaser	No	Yes	One	Range	1	NHS TRUST
Directorate	No	Yes	One	Range		

- Select Range if a range of Purchasers are to be included in the report. Use the space bar on your keyboard to move the highlight from **No** to **Range** and press **Enter**. A pop up list will appear for you to select the first Purchaser in the range. Having selected the first Purchaser, this will be entered on the selection screen and the pop up list will stay for you to select the last purchaser of the range. Your selection will appear on the screen.

Purchaser	No	Yes	One	Range	1	NHS TRUST
					to 2	GP Fundholder
Directorate	No	Yes	One	Range		

Directorate, Referrer, Orthosis Code, Supplier, GP and Postcode.

Apply the same selection procedure as with Purchaser to select No, Yes, One or Range.

Dates

Select All if you want to report on all orders on OPAS.

Select One if you want to report on one specific date. Use the space bar on your keyboard to move the highlight from All to One and press **Enter**. Type the date in the space provided in the format DD MM YYYY.

A screenshot of a software interface for selecting dates. It features a horizontal menu with four options: 'Dates', 'All', 'One', and 'Range'. The 'One' option is currently selected, highlighted with a blue background. To the right of the menu is a date input field with a placeholder format of 'DD / MM / YYYY'.

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**.

A screenshot of the same software interface. The 'Range' option in the horizontal menu is now selected, highlighted with a blue background. The date input field to the right remains empty with the 'DD / MM / YYYY' placeholder.

Now type in the from date in the next space.

A screenshot of the software interface. The 'Range' option is still selected. The date input field now contains the text '01/04/2001 to', followed by the 'DD / MM / YYYY' placeholder, indicating that a date range is being defined.**Using**

Select Ordered if you want to report on those orders that have an order date within the dates selected above

Select Received if you want to report on those orders that were received within the dates selected above

Select Supplied if you want to report on those orders that were supplied within the dates selected above

Select Invoiced if you want to report on those orders where the date of the suppliers invoice is within the dates selected above

Select Purchase if you want to report on those orders where the date of the

Invoice	purchase invoice is within the dates selected above
Select Paydate	if you want to report on those orders that were passed for payment is within the dates selected above

Continue

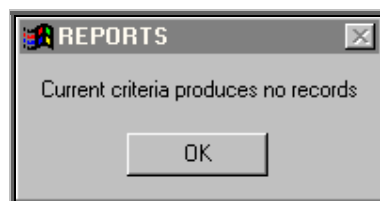
Select No	if you wish to abandon the Ad hoc report screen
Select Yes	if you wish OPAS to search for the orders that match the criteria selected

The selection screen below would show me all orders that had been supplied in April 2001 that were raised for Trauma & Orthopaedic for custom footwear, giving sub-totals for each supplier.

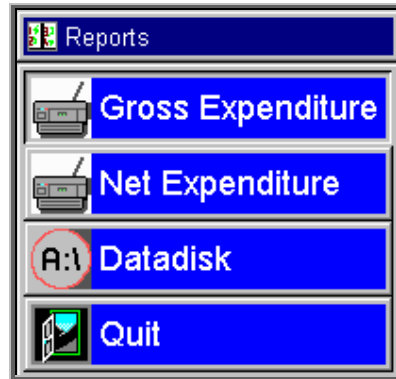
OPAS Reports Selection Criteria Screen

Purchaser	No	Yes	One	Range		
Directorate	No	Yes	One	Range	Trauma & Orthopaedic	
Referrer	No	Yes	One	Range		
Orthosis Code	No	Yes	One	Range	ABC123	Custom Footwear
Supplier	No	Yes	One	Range		
GP	No	Yes	One	Range		
Post Code	No	Yes	One	Range		
Dates	All	One	Range		01/04/2001 to 30/04/2001	
Using	Ordered	Received	Supplied	Invoiced	Purchase_Invoice	Paydate
Continue? No Yes						

Once you have selected **Yes** to continue, OPAS will search for all those orders that match the criteria selected. If no matches are found, the following message will appear.

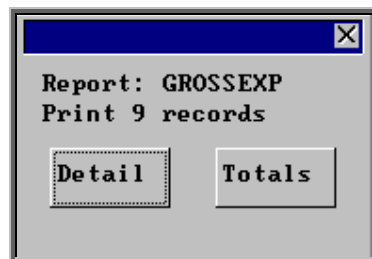


If orders have been found that match your criteria then the following **Reports** menu will appear.

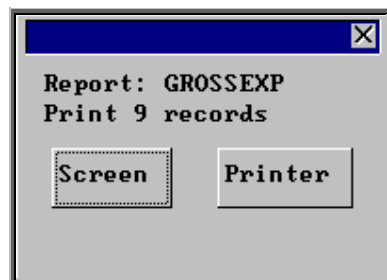


Gross Expenditure

If you wish to see the value of the orders including VAT, select **Gross Expenditure**.



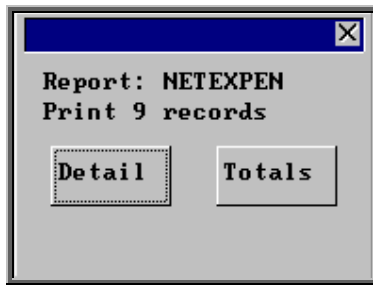
You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



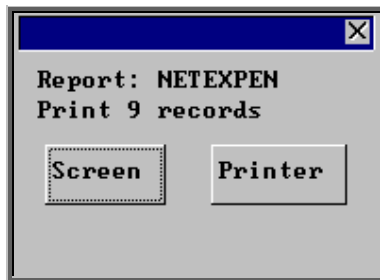
You will then be asked if you wish to see the information on the **screen** or to be sent to the **printer**. If screen is selected, having looked at it on the screen, you still have the option to send the information to the printer afterwards. If you don't want either option, press **Esc** to abandon.

Net Expenditure

If you wish to see the value of the orders excluding VAT, select **Net Expenditure**.



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



You will then be asked if you wish to see the information on the **screen** or to be sent to the **printer**. If screen is selected, having looked at it on the screen, you still have the option to send the information to the printer afterwards. If you don't want either option, press **Esc** to abandon.

Datadisk

The **Datadisk** option transfers the information found onto a 3 ½ floppy disk so that the data can be exported into a spreadsheet for manipulation, or into a report.

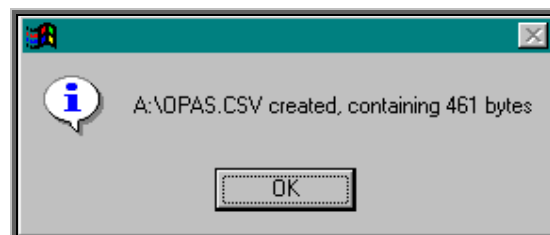
Having selected **Datadisk**, you can then choose what information on the order will be transferred. Move down the list, selecting those fields required by pressing **F7**. If a field is selected by mistake press **F7** again to de-select. The list is more than a page, so scroll down the page to see more. Once you have all the fields required press **F10** to continue. In the example below, I have selected the Order Number, Order Date, Patients full name and the Supplier name.

Fieldname	Type	Length	Filename	On table
Order No	Alpha	10	applianc	No
Order Ref	Counter	8	applianc	No
Post Code	Alpha	15	patients	No
Fit	Alpha	1	purchase	No
Pass	Alpha	1	applianc	No
Paydate	Date	8	applianc	No
Hsp Ord No	Alpha	20	applianc	No
Date of Order	Date	8	applianc	No
Sup Inv No	Alpha	10	applianc	No
Invoice Date	Date	8	applianc	No
Received	Date	8	applianc	No
Supplied	Date	8	applianc	No
Processor:	Alpha	8	applianc	No
Sales VAT	Alpha	1	purchase	No
Discount	Numeric	8	purchase	No
Hospital No	Alpha	12	applianc	No
Title	Alpha	12	patients	No
Forenames	Alpha	20	patients	No
Surname	Alpha	20	patients	No
Search	Alpha	18	oprice	No
MANUFACT	Numeric	8	oprice	No
code:	Alpha	15	item	No
DESCRIPT	Alpha	60	item	No
Purch Inv Date:	Date	8	applianc	No
pin:	Alpha	15	applianc	No
Clinician	Numeric	8	applianc	No
O:	Inverted	25	orthists	No
Supplier Code	Alpha	3	applianc	No
Cons_ref	Numeric	8	applianc	No
Purchaser	Numeric	8	applianc	No
Purchaser:	Alpha	30	purchase	No
NAME	Alpha	50	Supplier	No

A 3 ½ floppy disk now needs to be put into your computer, and then click on OK.



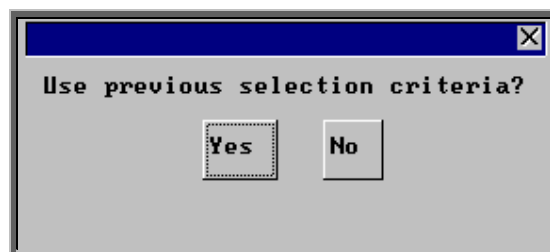
A comma separated variable file will be created called **OPAS.csv**.



This can now be exported into Lotus123 or MS Excel.

A	A	B	C	D	E	F
1	G00363	25/06/2002	MR	FRED	BLOGGS	Gilbert & Mellish Ltd
2	G00366	25/06/2002		S	ADLER	Jane Saunders & Manning Ltd
3	G00368	27/06/2002		DA	HANLEY	Jane Saunders & Manning Ltd
4	G00370	12/07/2002	MR	MARTIN	CRAVEN	Jane Saunders & Manning Ltd
5	G00369	12/07/2002		HJ	CARNE	Jane Saunders & Manning Ltd
6	G00371	25/07/2002	MR	FRED	BLOGGS	Ortho C Fab
7	G00375	11/09/2002	MR	KELVIN	BLOGGS	Jane Saunders & Manning Ltd

Note: The next time you select the **Ad hoc** report the following prompt will appear.



This is to save having to re-enter all the search criteria if you want to run exactly the same report again, or perhaps the same report with a different date range.

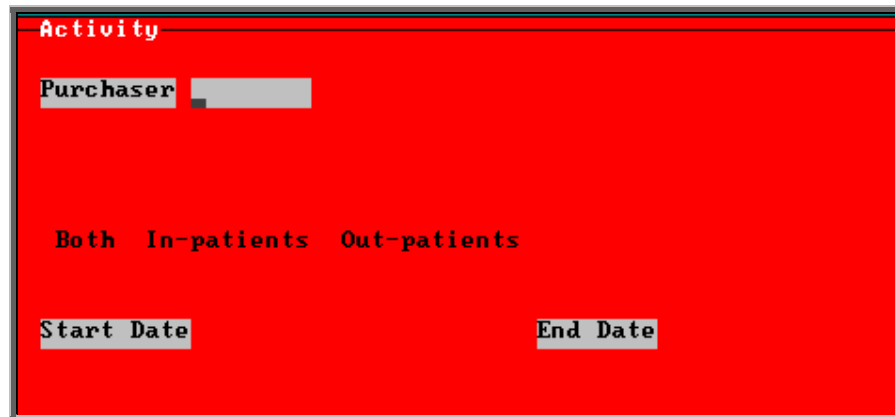
16. Financial Reports (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 27 different batch reports for orders alone, so we do not expect you to remember what they all do. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

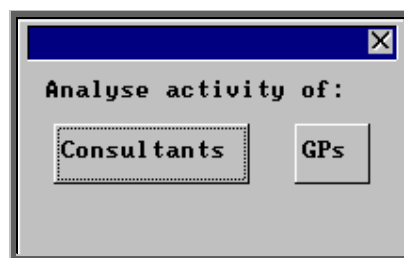
17. Financial report - Activity

Menu: Reports – Financial – Batches - Activity

The **Activity** report will show the number and value of orders for a specific period. The information can be analysed by Referrer or GP.



- select the Purchaser required from the pop up list
- select In-patients, Out-patients or Both. Press the space bar to move the highlight onto the required option
- 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



Select whether the data is to be analysed by **Consultants** or **GPs**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

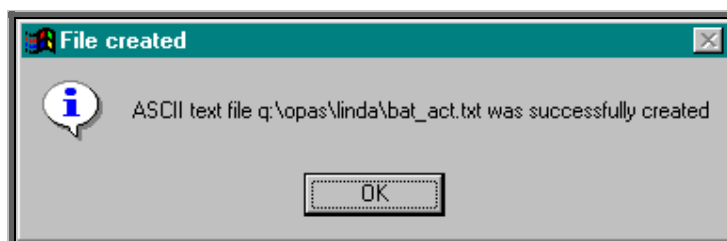
Printer

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

NHS TRUST				
Consultant Activity : All patients 28/10/2003				
01/01/2000 - 21/12/2003				
Directorate	Consultant	episodes	Cost	
Paediatrics	A N Other	1	352.50	352.50
Trauma & Orthopaedic	A N Other	1	338.94	338.94
	Mr Surgeon	11	1476.25	134.20
Directorate Total		12	1815.19	

File

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



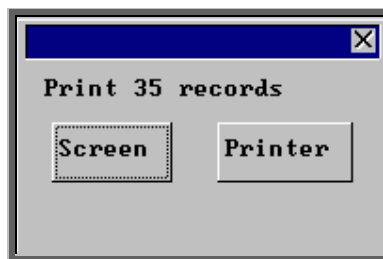
18. Financial report – Clinician

Menu: Reports – Financial – Batches – Clinician

The **Clinician** report gives detail of expenditure by Clinician. The report can be analysed by Costcode (Orthosis Code) or Directorate.



- select the Clinician required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Othotist field empty will result in all Clinicians being selected
- select Costcode or Directorate depending on how you want to analyse the data. Press the space bar to move between the options
- 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 or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen or Printer. Make another selection or press **Esc** again to return to the menu.

Printer

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

Below is an example of the Clinician report by Costcode.

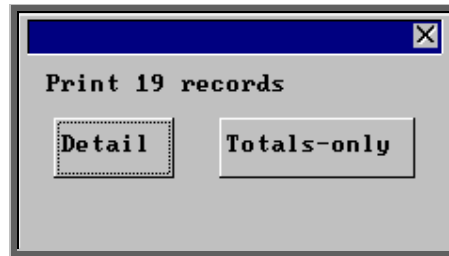
New User NHS Trust Orthotist spend by Cost Code 01/ 01/ 2000-31/ 12/ 2003				
Orthotist	Orthosis Code	Order No	Net :	Gross :
2	111111	G00403/ R1	288.46	338.94
		G00403	269.18	316.29
		G00397	55.20	64.86
		ERWERE	0.00	0.00
		G00387	22.00	25.85
		5	634.84	745.94
999999		G00373	295.21	346.87

19. Financial report - Clinics

Menu: Reports – Financial – Batches – Clinics

The **Clinics** report will breakdown the expenditure on orders by the patients Referrer. The report can be run for all Referrers or one specific Referrer.

- select the **Referrer** required 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

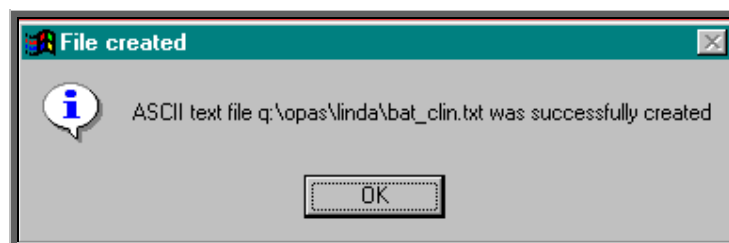
Printer

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

New User NHS Trust Monthly Report To Purchaser : Mr Surgeon Trauma & Orthopaedic 01/ 01/ 2000 to 31/ 12/ 2003				
Clinic:	Code	Hosp No	Patient Name	Gross
Appliance Department	999999	G8350674	A YOUNG	14.38
	XYZ890	G9202344	D FREAK	239.37
	999999	G8355370	D EYRE	64.51
	ABC123	ABC21234	M S S T EYES	328.29
	999999	01232195	J HAMILTON	2.17
	ABC123	G0326425	H CARNE	363.94
	ABC123	TBVP000010	MR M CRAVEN	363.94
	999999	TORUS004	M S S T SMITH	346.87
	ABC123	G0230753	R BENNET	64.08
	111111	12345QWERTY	MR K BLOOGS	25.85
	ABC123	TMP000013	A HARTIGAN	9.72
	ABC123	12345QWERTY	MR K BLOOGS	0.00
Total				1,823.12
Count				12
Total for Consultant				1,823.12
Count				12

File

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



20. Financial report - Costcode

Menu: Reports – Financial – Batches – Costcode

The **Costcode** report will breakdown the expenditure on orders by the Orthosis Code. This report also gives you the ability to interrogate expenditure on Orthosis Codes by Referrer, Directorate, Purchaser or Supplier, showing the count (number of orders), Net (value excluding VAT), Gross (value including VAT) or Sell (value sold on to 3rd party).



- 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
- select **No** to print the standard **Costcode** report that shows orders raised by Orthosis Code.



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

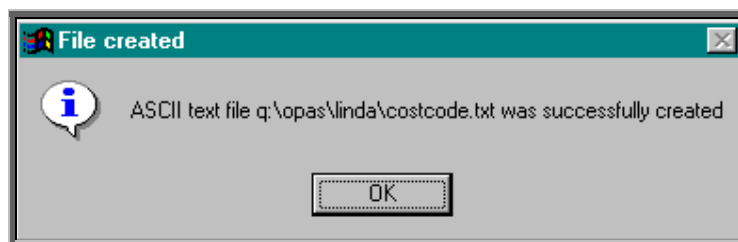
Printer

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

New User NHS Trust				
Amount Spent by Cost Code (NHS TRUST)				
01/ 01/ 2000 to 31/ 12/ 2003				
Cost Code		Net	Gross	Sel I
111111		22.00	25.85	0.00
		288.46	338.94	330.47
Total for code	Sum	310.46	364.79	330.47
111111	Avg	155.23	182.40	165.24
	Count	2		
999999		1.85	2.17	0.00
		54.90	64.51	0.00
		12.24	14.38	14.02
Total for code	Sum	68.99	81.06	14.02
999999	Avg	23.00	27.02	4.67
	Count	3		

File

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



If Count, Net, Gross or Sell are selected a spreadsheet will be produced.

Select Count if you want to know how many orders were raised. If you select Count you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

Select **Net** if you want to know the value of the orders excluding VAT. If you select **Net** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

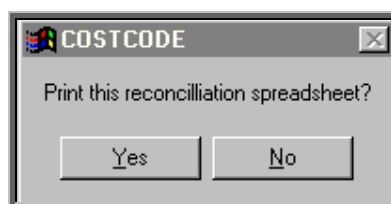
Select **Gross** if you want to know the value of the orders including VAT. If you select **Gross** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

Select **Sell** if you want to know the value the goods were sold on for. If you select **Sell** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

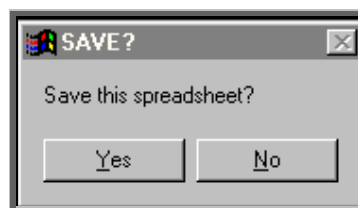
Below is an example of a spreadsheet produced by selecting **Net** and **Directorate**.

	1	2	3	4
1	Cost-code reconciliation			
2	All Purchasers by Directorate			
3	01/01/2001 - 01/01/2002			
4	Net Cost			
5		999999	ABC123	Totals
6	PCG		£577.68	£577.68
7	Surgery			
8	Trauma & Orthopaedic	£404.34	£519.48	£923.82
9				
10	Totals	£404.34	£1,097.16	£1,501.50
11				
12				

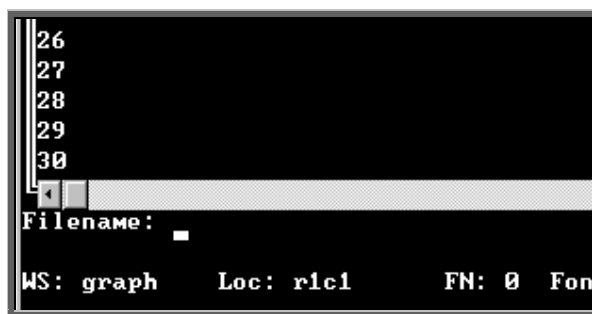
You will be asked if you wish to print the spreadsheet.



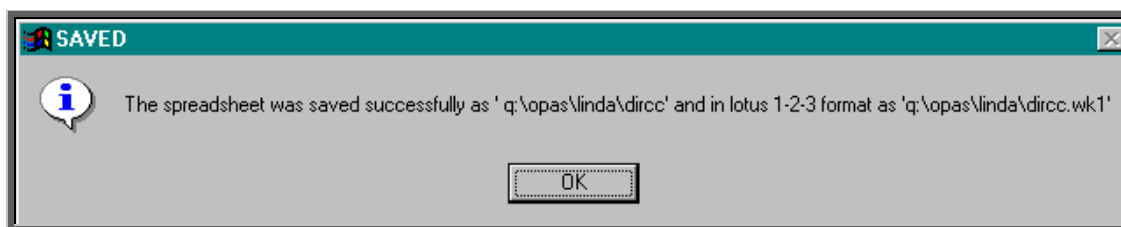
You will then be asked if you wish to save the spreadsheet.



If you select **Yes**, you need to enter a filename at the bottom of the screen.



This will then be saved with that name within your personal directory of OPAS.



21. Financial report - Creditors

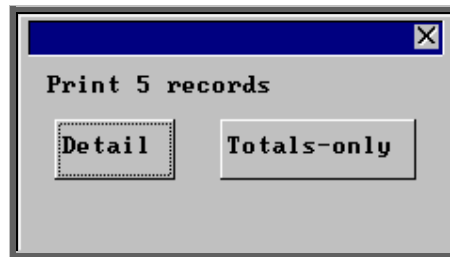
Menu: Reports – Financial – Batches – Creditors

The **Creditors** report is particularly useful for your Finance department, as it shows those orders where an invoice has not yet been received. This will give them an indication of how much has been committed and is still to pay for. The report initially shows all orders where there has not yet been an invoice, but we can change this report to show only those orders where there has not yet been an invoice but the goods have been received.

A screenshot of a form titled 'Creditors' in red text. The form has a red background. It contains three input fields: 'Purchaser' at the top, 'Start Date' at the bottom left, and 'End Date' at the bottom right. Each field has a small grey rectangular box next to it for data entry.

- select the Purchaser required from the pop up list.

- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

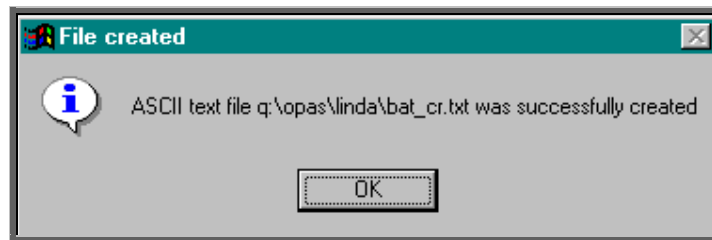
Printer

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

G00376	16/09/2002	28/01/2003	29/01/2003	ELIZABETH	BUTCHER	7.97
G00376/R1	28/04/2003			KELVIN	BLOGGS	0.00
G00376/R2	02/07/2003			KELVIN	BLOGGS	0.00
G00376/R3	04/09/2003			KELVIN	BLOGGS	0.00
Total for Bolton Bros. (Surg. Shoemakers) Ltd						7.97
Count 4						
1234567890	14/10/2003			KELVIN	BLOGGS	300.80
9876543210	14/10/2003			KELVIN	BLOGGS	300.80
G00357	31/10/2001	06/06/2002		FRED	BLOGGS	103.26
G00396	28/04/2003			TEE	EYES	322.04
Total for Halo Healthcare Ltd						1,026.90

File

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



22. Financial report - Debtors

Menu: Reports – Financial – Batches – Debtors

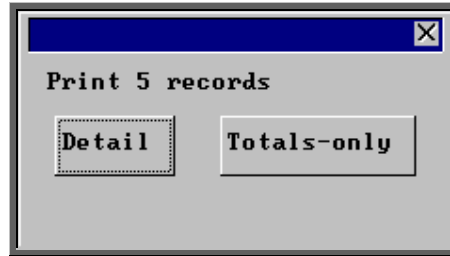
The **Debtor** report lists those orders that have had a supplier invoice but have not yet been re-invoiced to the Purchaser (where the Purchaser is set as external for re-charging purposes).



- select the **Purchaser** required from the pop up list. If you select a Purchaser that is not an external purchaser the following message will appear. Press the **Tab** key to bring the pop up list back and make another selection.



- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

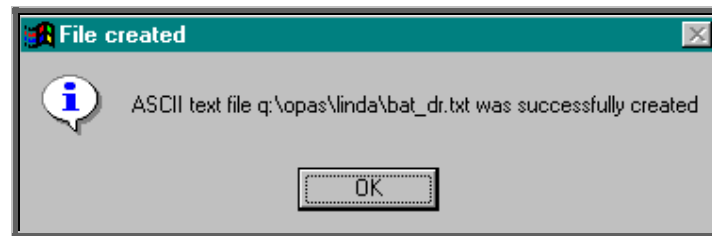
Printer

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

Debtors Report for GP Fundholder Supplier invoiced between 01/01/2000 and 31/12/2003 not yet re-invoiced			
Order No	Date of Order	Name	Cost :
2343234er	14/10/2003	MR KELVIN BLOGGS	55.44
G00393	28/04/2003	ALF HARTIGAN	288.27
G00403/R1	04/09/2003	MISS TESSA SMITH	288.46
Grand Total			632.17

File

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



23. Financial report - Directorate

Menu: Reports – Financial – Batches – Directorate

The **Directorate** report will breakdown the expenditure on orders by Directorate.

A screenshot of a report form titled "Directorate" in red text. The form has a yellow background and a black border. It contains three input fields: "Purchaser" at the top left, "Start Date" at the bottom left, and "End Date" at the bottom right. Each field has a small gray rectangular box next to it for data entry.

- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

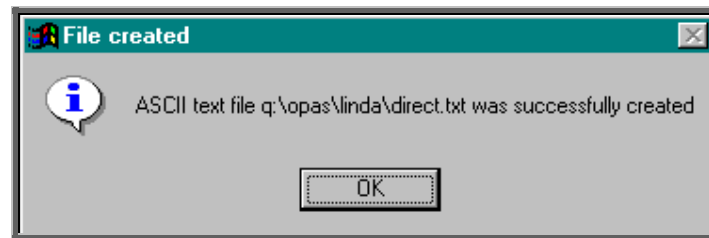
Printer

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

New User NHS Trust				
Gross Amount Spent by Directorate				
01/01/2001 to 31/10/2003				
Speccode	Directorate	IP	OP	Total
PAED	Paediatrics		352 .50	352 .50
	Total		352 .50	352 .50
12345678	Trauma & Orthopaedic		239 .37	239 .37
			64 .51	64 .51
			328 .29	328 .29
		2 .17	2 .17	2 .17
			14 .38	14 .38
			363 .94	363 .94
			363 .94	363 .94
			64 .08	64 .08
			264 .35	264 .35
			25 .85	25 .85
			338 .94	338 .94
	Total	2 .17	2,067 .65	2,069 .82

File

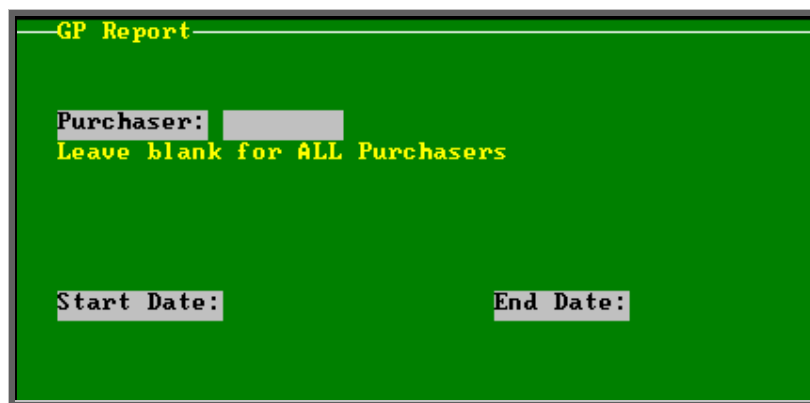
A comma separated variable file will be created called **direct.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



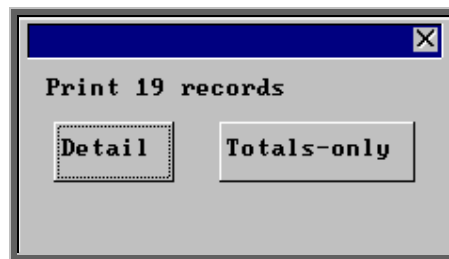
24. Financial report - GPs

Menu: Reports – Financial – Batches – GPs

The GPs report will analyse the expenditure on orders by the patients GP.



- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

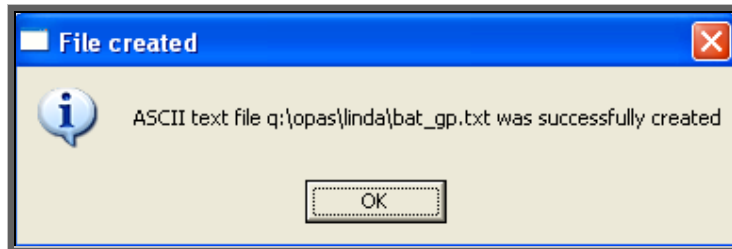
Printer

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

New User NHS Trust				
GP Practice Spend - All Purchasers				
01/01/2001-31/10/2003				
Date of Order	Order No	Surname	Doctor	Gross:
28/04/2003	G00395	BLOWED	ANDERSON MG	170.67
Total for : LENSFIELD MEDICAL PRAC.				170.67
Count 1				
28/04/2003	G00397	FERG VAL	FLAXMAN PA	64.86
Total for : LUTTERWORTH HEALTH CENTRE				64.86
Count 1				

File

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



25. Financial report - Graphs

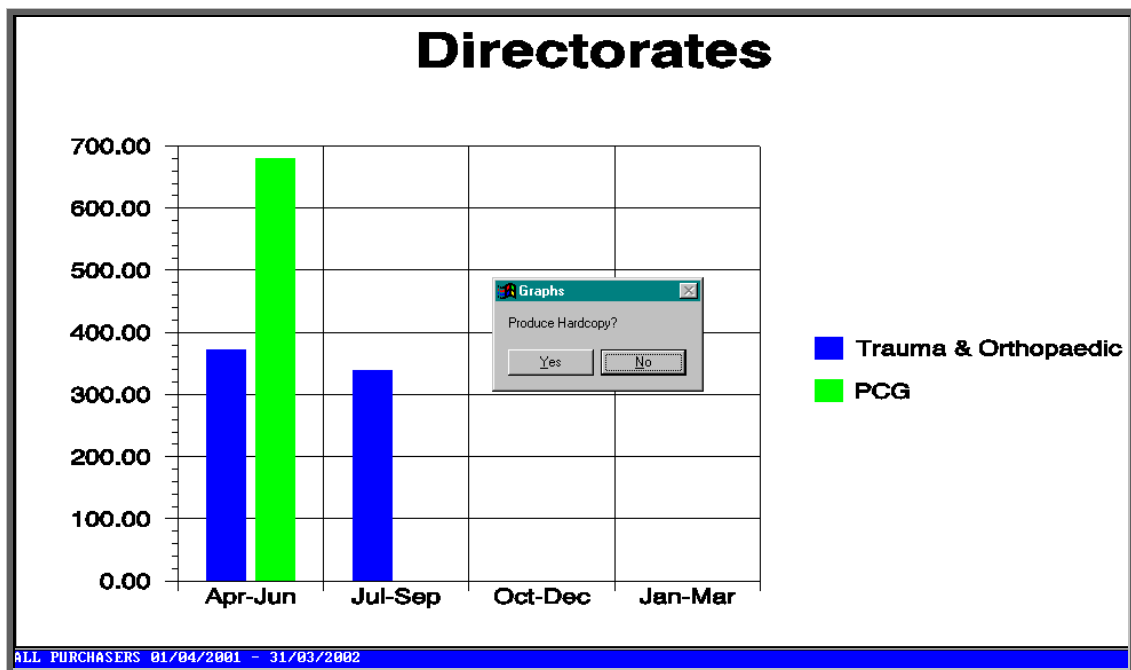
Menu: Reports – Financial – Batches – Graphs

The **Graphs** report will analyse the expenditure on orders and display the information in graph form. The information can be analysed by Orthosis Codes or Directorate.

- 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 **Current** year or **Previous** year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select what the data is to be analysed by i.e. on **Costcodes** (Orthosis Code) or **DIRECTORATES**. Use the space bar to move between options

- select **Type M** to see the full year broken down by month
- select **Type Q** to see the full year broken down by quarters
- select **Type 1** to see the first quarter (1 April – 30 June) broken down by month
- select **Type2** to see the second quarter (1 July – 30 September) broken down by month
- select **Type3** to see the third quarter (1 October – 31 December) broken down by month
- select **Type 4** to see the fourth quarter (1 January – 31 March) broken down by month

Below is an example produced by selecting Previous year, Directorate and Type Q

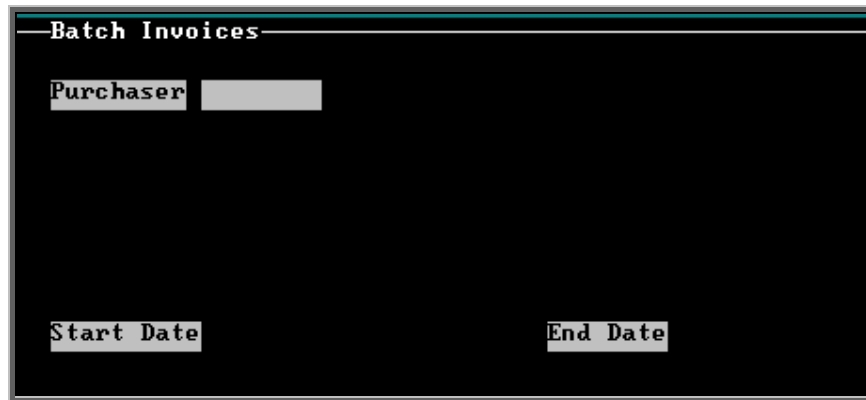


The graph will appear on the screen, but you have the option to print a hardcopy.

26. Financial report - Invoices

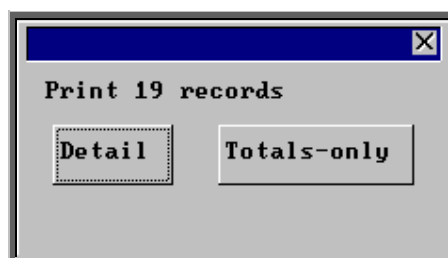
Menu: Reports – Financial – Batches – Invoices

The **Invoices** report shows details of orders where the supplier invoices have been received.



- 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

Note. The date range here is looking at the supplier's invoice date and **not** the date the order was raised.



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just totals



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

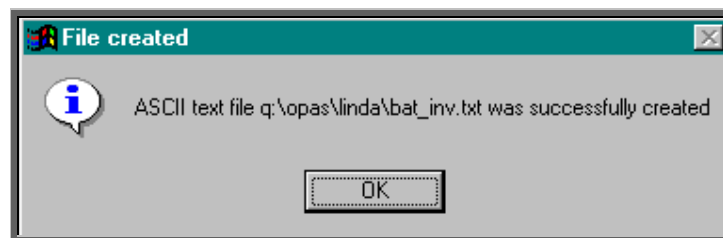
Printer

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

New User NHS Trust Purchase Invoices for Payment (NHS TRUST) 01/01/2000 to 31/10/2003					
Order No	Surname	Date	Cost	Hsp	Ord No
G00359	BROWN	19/06/2003	352.50		
G00403/R1	SMITH	30/09/2003	338.94		
Grand Total			691.44		

File

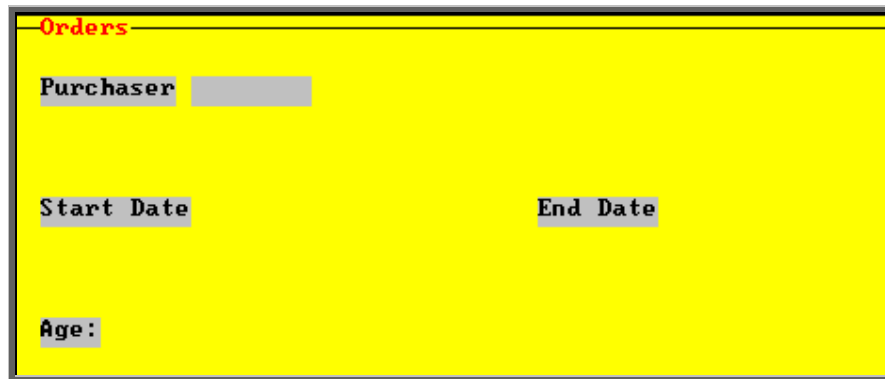
A comma separated variable file will be created called **bat_inv.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



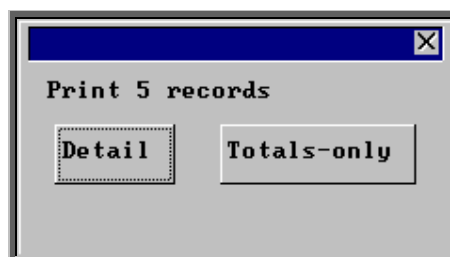
27. Financial report - Orders

Menu: Reports – Financial – Batches – Orders

The Orders report shows details of orders raised over a specific period.



- 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
- select No for the standard order report



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

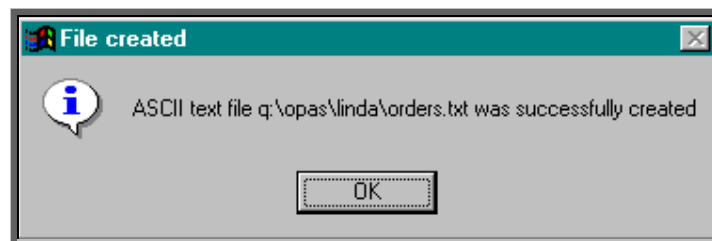
Printer

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

New User NHS Trust Orders raised by Trauma & Orthopaedic 01/01/2000 to 31/12/2002										
Order Date	Order No	Supplier	Description	Spec. code	Consultant	Received	Sup Inv No	Inv Date	Paydate	Gross
11/07/2001	1234567	Medistox Ltd	COLLAR	12345678	Mr Surgeon	20/08/2001	3401011	12/07/2001	27/04/2003	2.17
28/05/2001	G00351	Halo Healthcare Ltd	Boots	12345678	Mr Surgeon	10/05/2002	55442	15/04/2003	27/04/2003	239.37
31/10/2001	G00357	Halo Healthcare Ltd	Shoes	12345678	Mr Surgeon	05/06/2002				103.26
26/06/2002	G00367	Jane Saunders & Mann	Collar	12345678	Mr Surgeon	01/08/2002				14.69
27/06/2002	G00368	Jane Saunders & Mann	Shoes	12345678	Mr Surgeon	09/10/2002				94.59
12/07/2002	G00369	Jane Saunders & Mann	Shoes	12345678	Mr Surgeon	23/07/2002	56755544	05/02/2003	27/04/2003	363.94
14/08/2002	G00373	Peacocks Medical Gro	KNEE BRACE	12345678	Mr Surgeon	15/08/2002	01016	09/10/2002	27/04/2003	346.87
11/09/2002	G00375	Jane Saunders & Mann	Shoe	12345678	Mr Surgeon	08/10/2002				142.42
12/06/2001	VI234	Halo Healthcare Ltd	SHOES	12345678	Mr Surgeon	10/05/2002	01010	13/06/2001	31/03/2003	328.29
Total for Mr Surgeon										1,635.60
Count										9

File

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



If **Count**, **Net**, **Gross** or **Sell** are selected, a spreadsheet will be produced analysing the orders by the age of the patient.

Select **Count** if you want to know how many orders were raised.

Select **Net** if you want to know the value of the orders excluding VAT.

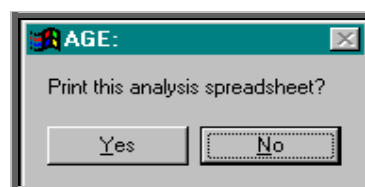
Select **Gross** if you want to know the value of the orders including VAT.

Select **Sell** if you want to know the value the goods were sold on for.

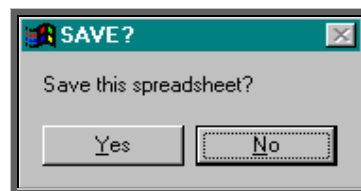
Below is an example of a spreadsheet produced by selecting **Net**.

	1	2	3	4	5	6	7	8
1	Age Analysis							
2								
3	01/01/2000 - 01/01/2001							
4	Net Cost							
5		0-5	6-16	17-30	31-50	51-65	66+	Totals
6	1		£1,068.00	£402.81	£1,188.79	£618.06	£193.47	£3,471.13
7	2			£313.50				£313.50
8	3				£174.02			£174.02
9								
10	Totals		£1,068.00	£716.31	£1,362.81	£618.06	£193.47	£3,958.65
11								
12								

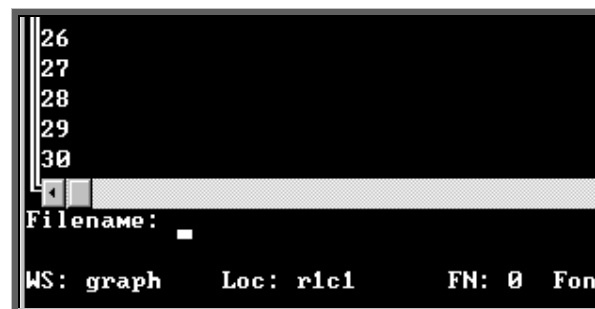
You will be asked if you wish to print the spreadsheet.



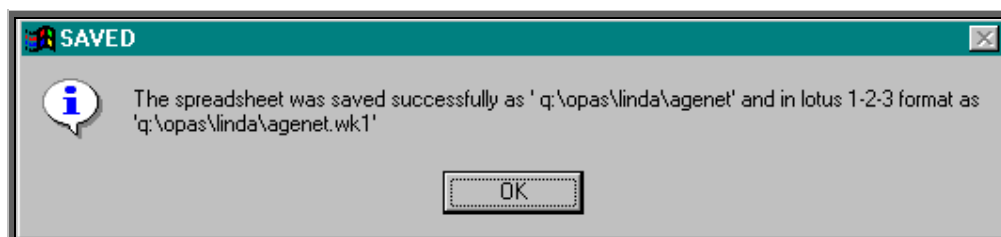
You will then be asked if you wish to save the spreadsheet.



If you select **Yes**, you need to enter a filename at the bottom of the screen.




This will then be saved with that name within your personal directory of OPAS.




29. Financial report – Payments

Menu: Reports – Financial – Batches – Payments

This report will show those orders that have been passed for payment between the selected dates



- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

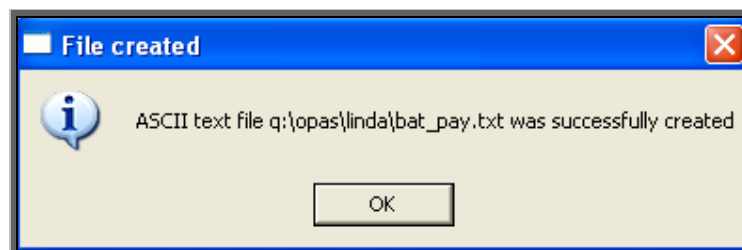
Printer

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

New User NHS Trust Invoices Passed for Payment 01/ 01/ 2000 to 31/ 10/ 2003						
Pay date	Date of	Order	Order	No Sup	Inv No	Invoice Date
31/ 03/ 2003	12/ 06/ 2001	VM234	01010			13/ 06/ 2001
27/ 04/ 2003	28/ 05/ 2001	G00351	55442			15/ 04/ 2003
Total for Halo Healthcare Ltd					483.11	567.66
27/ 04/ 2003	28/ 05/ 2001	G00350	11211			01/ 04/ 2003
Total for Tyco Healthcare (UK) Ltd					12.24	14.38

File

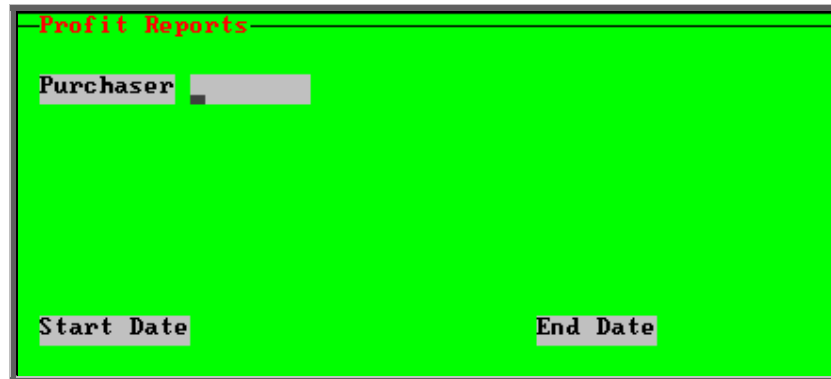
A comma separated variable file will be created called **bat_pay.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



29. Financial report – Profit

Menu: Reports – Financial – Batches – Profit

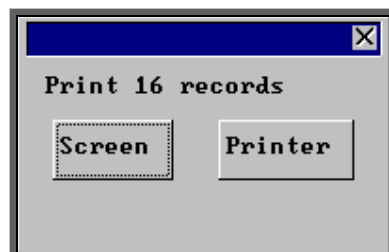
The **Profit** report is used to show the profit (if any) on those orders where the Purchaser is being re-charged for the appliance and/or service.



- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



Once the data has been found you have the option to see the report on screen or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen** or **Printer**. Make another selection or press **Esc** again to return to the menu.

Printer

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

New User NHS Trust Profit report for A N O T H E R 01/ 01/ 2001 to 31/ 10/ 2003					
Order No	Purchase Total	Purchase VAT	Sal es Tot al	Sal es VAT	Pr of it
G00350	14.38	2.14	14.02	2.45	1.29
G00369	363.94	54.20	354.84	62.10	32.59
G00373	346.87	51.66	355.12	62.14	49.98
G00383	14.69	2.19	14.69	2.57	1.73
W1234	328.29	48.90	330.78	57.88	41.36
Tot al s	1068.17	159.09	1069.45	187.14	126.94

30. Financial report – Progress

Menu: Reports – Financial – Batches – Progress

The **Progress** report provides the information needed to chase suppliers that have not delivered goods by the expected supply date.

Order Progress

Supplier: **Both** **Non-Stock** **Stock**

Start Date
End Date

- select **Both**, **Non-Stock** or **Stock** depending on which orders you wish to chase. Press the space bar to move between the options
- 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

Note. The date range here is looking at the expected supply date and **not** the date the order was raised. This means that you can actually be proactive and put a date in the future in the **End date** so that orders that were due to be delivered by the end of the week and are not in yet will show on the report.



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

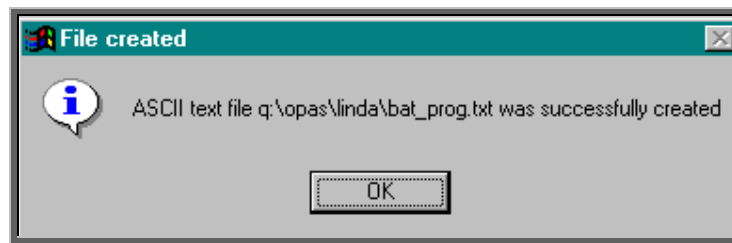
Printer

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

New User: NHS Trust Batch Progress Report 01/ 01/ 2000 - 31/ 10/ 2003						
Supplier	Patient	Order No	Orth Code	Order date	Req. By	Expected
Bolton Bros. (Surg. Shoemakers) Ltd	HUCKER	EXT00394	ABC123	28/ 04/ 2003	26/ 05/ 2003	.....
Halo Healthcare Ltd	HARTIGAN	G00393	ABC123	28/ 04/ 2003	26/ 05/ 2003	.....
Tyco Healthcare (UK) Ltd	BLOWED	G00395	XYZ690	28/ 04/ 2003	05/ 05/ 2003	.....
Gilbert & Mellish Ltd	BLOGGS	00363	ABC123	25/ 06/ 2002	23/ 07/ 2002	.....
JJR Orthopaedic Services	BLOGGS	G00405	ABC123	03/ 09/ 2003	01/ 10/ 2003	.....
Medistox Ltd	PEROVAL	G00397	111111	28/ 04/ 2003	12/ 05/ 2003	.....
Peacocks Medical Group Ltd	BLOGGS	G00389	ABC123	25/ 04/ 2003	23/ 05/ 2003	.....
Peacocks Medical Group Ltd	SMITH	G00390	ABC123	25/ 04/ 2003	23/ 05/ 2003	.....
Peacocks Medical Group Ltd	PARGETTER	G00409	ABC123	04/ 09/ 2003	16/ 10/ 2003	.....
Ortho C Fab	BLOGGS	G00371	ABC123	25/ 07/ 2002	22/ 08/ 2002	.....
Remploy Healthcare	BLOGGS	G00358 R2	999999	10/ 06/ 2002	05/ 05/ 2003	.....
	VIREN	G00391	ABC123	25/ 04/ 2003	23/ 05/ 2003	.....

File

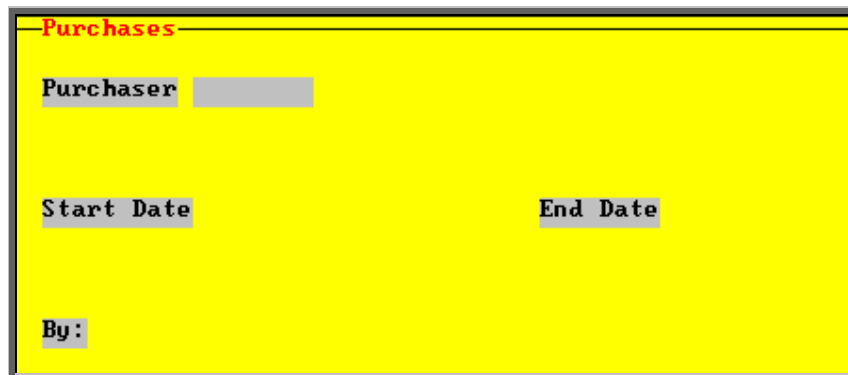
A comma separated variable file will be created called **bat_prog.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



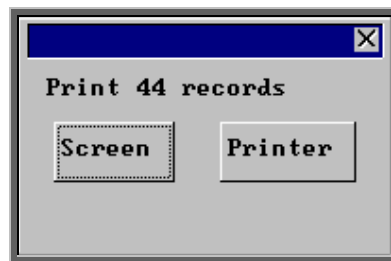
31. Financial report – Purchases

Menu: Reports – Financial – Batches – Purchases

The **Purchases** report is a quick way of getting totals of expenditure, analysed by Referrer, Directorate, GP, Orthosis Code or supplier. Order details cannot be obtained using this report.



- 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
- select what the data is to be analysed by i.e. on **Referrer**, **Directorate**, **GP**, **Orthosis_code** or **Supplier**. Use the space bar to move between options



Once the data has been found you have the option to see the report on screen or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen or Printer. Make another selection or press **Esc** again to return to the menu.

Printer

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

Below is an example report generated by selecting all purchasers and analysing by Directorate.

New User NHS Trust ALL PURCHASERS 01/ 01/ 2000-01/ 01/ 2001			
Directorate	No of Orders	Net :	Gross :
POG	7	853.42	1,002.76
PCT	2	85.00	99.88
Surgery	6	283.50	333.11
Trauma & Orthopaedic	29	5,007.06	5,883.32
Grand Total	44	6,228.98	7,319.07

32. Financial report – Quarterly

Menu: Reports – Financial – Batches – Quarterly

The **Quarterly** report will analyse the expenditure on orders and display the information in spreadsheet format. The information can be analysed by Orthosis Code or Directorate.

Quarterly Analysis

Purchaser

Year **Current** **Previous** **Start Date** **End Date**

For:

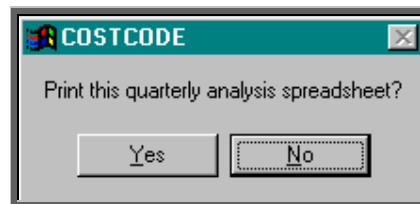
Using **Net** **Gross** **Sell** **Type:**

- 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 **Current** year or **Previous** year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select what the data is to be analysed by i.e. on **Costcode** (Orthosis Code) or **Directorate**. Use the space bar to move between options
- select whether the value shown should be **Net** (excluding VAT), **Gross** (including VAT) or **Sell** (price sold on when re-charging)
- select **Type Q** to see the full year broken down by quarters
 - select **Type 1** to see the first quarter (1 April – 30 June) broken down by month
 - select **Type2** to see the second quarter (1 July – 30 September) broken down by month
 - select **Type3** to see the third quarter (1 October – 31 December) broken down by month
 - select **Type 4** to see the fourth quarter (1 January – 31 March) broken down by month

Below is an example produced by selecting Previous year, Directorate, Net and Type Q

	1	2	3	4	5	6	7	8	9	10	11
1	Cost-code analysis										
2	ALL PURCHASERS										
3	01/04/2001 - 31/03/2002										
4											
5			Q1 Count		Q2 Count		Q3 Count		Q4 Count		Total Count
6	PCG	£577.68	3							£577.68	3
7	Trauma & Orthopaedic	£315.98	6	£288.65	3				2	£604.63	11
8	-----										
9	Totals	£893.66	9	£288.65	3				2	£1,182.31	14
10	=====										
11											

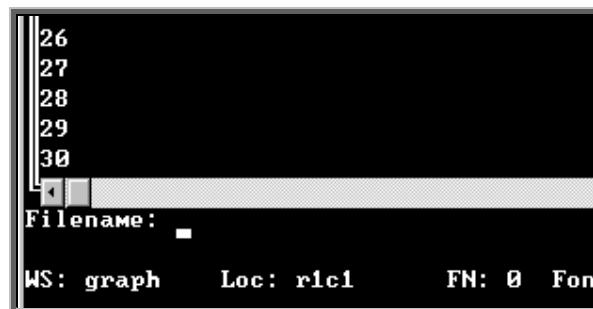
You will be asked if you wish to print the spreadsheet.



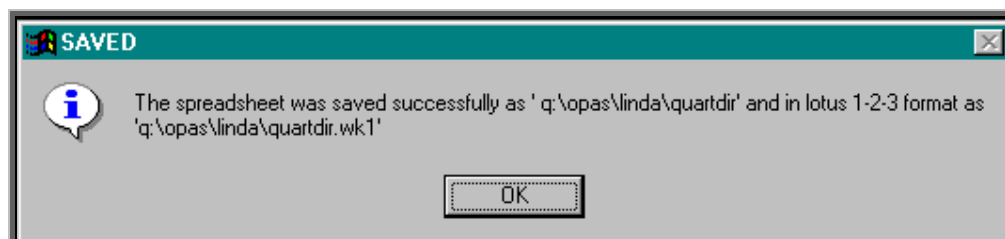
You will then be asked if you wish to save the spreadsheet.



If you select Yes, you need to enter a filename at the bottom of the screen.



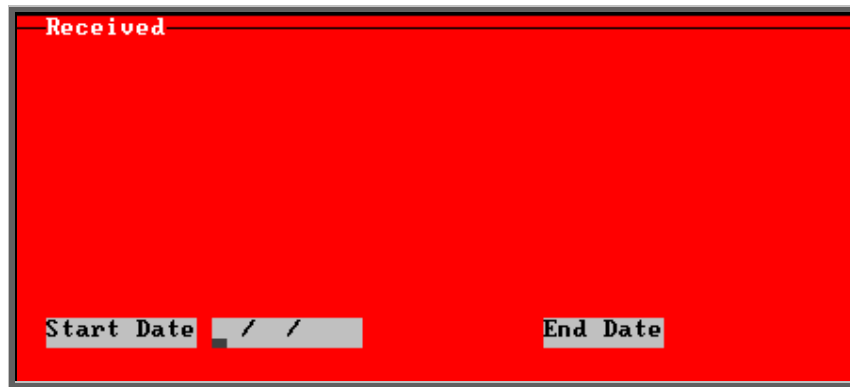
This will then be saved with that name within your personal directory of OPAS.



33. Financial report – Received

Menu: Reports – Financial – Batches – Received

The **Received** report shows which orders have been received over a specific time period.



- 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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

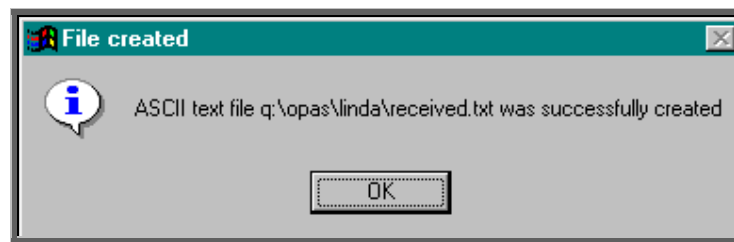
Printer

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

Received Items 01/ 09/ 2003 - 31/ 10/ 2003						
Order No	Schedule Number	Description	VAT	Net	Gross	
EXT00401	A135-80103BK	CPAL POD ABET SHOE 80-103 BLACK Sz 35	S	425.25	499.67	
EXT00402	A135-80103BK	CPAL POD ABET SHOE 80-103 BLACK Sz 35	S		0.00	
G00403/ R1	A1a	Custom made boots, lightweight construction, singl	S	288.46	338.94	
Total for VAT code				713.71	838.61	

File

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



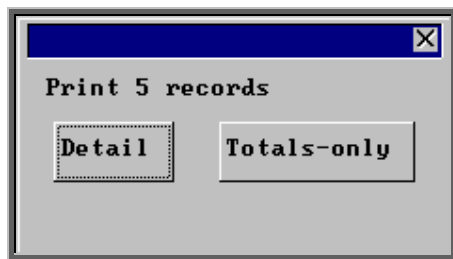
34. Financial report – Reclaim VAT

Menu: Reports – Financial – Batches – Reclaim VAT

The **Reclaim VAT** report will show details of lines within orders where the VAT rate is R for Reclaim.

- 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

Note. The date range selected is looking at the date the invoices were passed for payment (i.e. the Paydate) and **not** the date the order was raised. This is because VAT should not be reclaimed before it is paid.



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

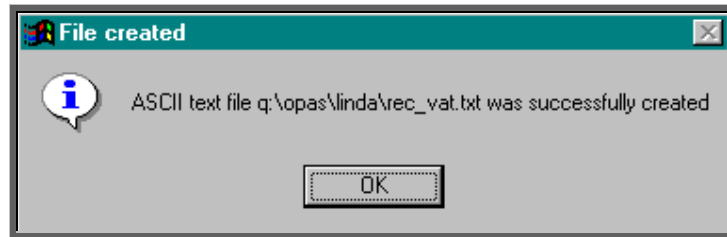
Printer

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

New User NHS Trust Reclaim VAT report for invoices passed 01/01/2003-31/10/2003						
Order No	Supplier	Appliance Code	Directorate	Net	Gross	VAT
G00359	078	A100b	Paediatrics	300.00	352.50	52.50
G00370	096	A1a	Trauma & Orthopaedic	309.74	363.94	54.20
G00379	201	A1a	Trauma & Orthopaedic	224.98	264.35	39.37
Grand Total				834.72	980.79	146.07

File

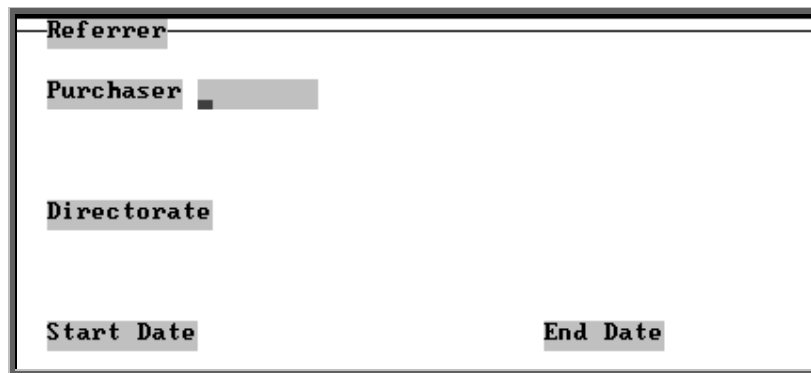
A comma separated variable file will be created called **rec_vat.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



35. Financial report - Referrers

Menu: Reports – Financial – Batches – Referrers

The **Referrers** report will also breakdown the expenditure on orders by the patients Referrer, but will allow you select a specific **Purchaser** and/or **Directorate**. A specific Referrer cannot be selected using this report. For specific Referrers use the **Clinics** report.



- 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 the **Directorate** required 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

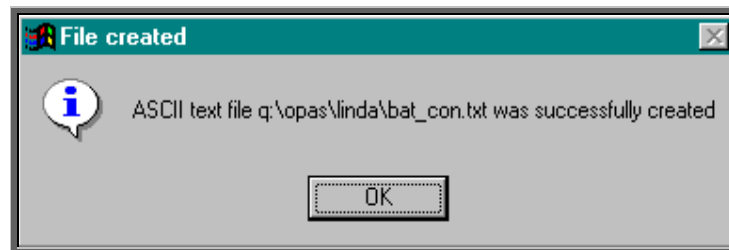
Printer

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

New User NHS Trust Monthly Report To Purchaser : 01/ 01/ 2000 to 31/ 10/ 2003				
Code	Hosp No	Patient Name	Order No	Gross
XYZ890	WOFNEQW	MASTER S BROWN	G00359	352.50
111111	TORUS004	M SS T SM TH	G00403/ R1	338.94
Total for A N Other Paediatrics				Sum 691.44
				Avg 345.72
				Count 2
999999	G8355370	D EYRE	23456	64.51
999999	01232195	J HAM LTON	1234567	2.17
XYZ890	G9202344	D FREAKE	G00351	239.37
ABC123	TEVP000010	MR M CRAVEN	G00370	363.94
ABC123	G0230753	R BENNET	G00377	64.08
ABC123	G123456	M SS J COLE	G00379	264.35
111111	12345QWERT	MR K BLOGGS	G00387	25.85
Total for Mr Surgeon Trauma & Orthopaedi c				Sum 1,024.27
				Avg 146.32
				Count 7

File

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



36. Financial report – Returns

Menu: Reports – Financial – Batches – Returns

This report will show those orders that have been returned to the supplier and why. The report will show all orders that have been returned, regardless of whether a replacement has been booked in.

- 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

You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

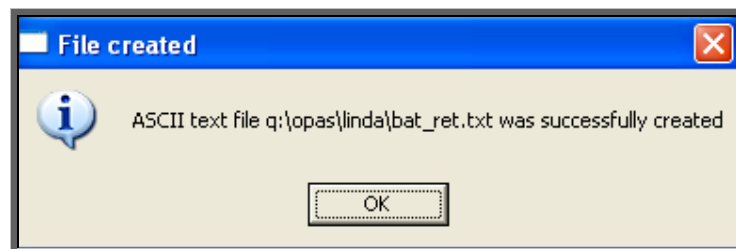
Printer

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

Returns Report 01/04/2002 - 31/03/2003						
Date	Patient	Order	Supp	Description	Orthosi sCode	Reason for return
13/05/2002	GI340163	G00343	075		AEC123	Goods faulty
13/05/2002	XY20987654	G00357	012	Shoes	999999	To be finished off
05/06/2002	XY20987654	G00357	012	Shoes	999999	To be finished off
10/05/2002	AEC21234	VA234	012	SHOES	AEC123	Different type of shoe needed
01/05/2002	W0PNEOW	G00359	078	Shoes	XY2890	Heel to be altered
10/05/2002	W0PNEOW	G00359	078	Shoes	XY2890	Fastener to be adjusted
20/05/2002	W0PNEOW	G00359	078	Shoes	XY2890	The left shoe is rubbing
22/04/2002	XY20987654	G00358	087	Shoes and adaptions	999999	Patient doesn't like them
13/05/2002	XY20987654	G00358	087	Shoes and adaptions	999999	Arrived too late
01/08/2002	G0825852	G00368	096	Testing	AEC123	Wrong size delivered
21/02/2003	G0418296	P000378	145	Shoes	AEC123	TESTING
28/02/2003	G0418296	P000378	145	Shoes	AEC123	Wrong goods sent
13/05/2002	G3356370	23456	158	Bra	999999	Wrong size sent
Total for Purchaser : 1 Count 13						
13/05/2002	XY20987654	00339	078	Custom shoes	AEC123	Sole to be built up
Total for Purchaser : 54 Count 1						

File

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



37. Financial report – Schedules

Menu: Reports – Financial – Batches – Schedules

The **Schedules** report gives detail of appliances ordered by schedule number. If an item is entered on an order without a schedule number it will not be included in this report.

- 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

You will be shown how many orders OPAS has found and ask if you want to see the information in detail i.e. a line for each order or just totals

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

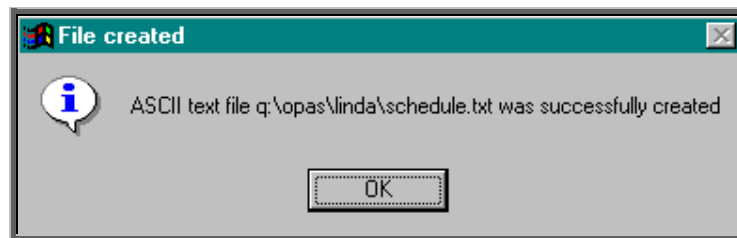
Printer

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

New User NHS Trust Schedules Report 1/ 1/ 2000 - 31/ 12/ 2003				
Order No	Code	Description	Qty	Cost
4 G00350	A135-801	LEVELLING CRADLE, MOULDED TO A CAST, U	1	12.24
G00369	A1a	Custom made boots, lightweight constru	1	309.74
G00373	A1a	Custom made boots, lightweight constru	1	224.98
W1234	A1b	Custom made shoes or sandals	1	254.95
W1234	A42	Addition full or 3/4 non-moulded inlay	1	10.00
W1234	A43a	Add full / 3/4 non moulded inlay shock a	1	14.44
G00373	E088B	BELOW KN POLYPROP COSM. (CUSTOM TO CAS	1	70.23
G00383	STM25X16	soft collar	1	12.50
Total for Purchaser				909.08

File

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



38. Financial report – Statements

Menu: Reports – Financial – Batches – Statements

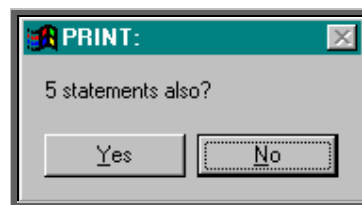
The **Statements** report shows purchase invoices raised within a specific period of time and also offers the option to print those invoices.

- 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

The report will be automatically sent to the printer.

NHS TRUST Invoice Statement Report 01/11/2003 to 01/11/2003						
Surname	Order No	Hospital No	Received Supplied	Practice	GP PCT	Cost
CRAVEN Shoes	G00370	TEMP000010	28/04/2003	Mr Surgeon	HIRST CI 5E2	1302.00
Total for Mr Surgeon						1302.00
						Count 1

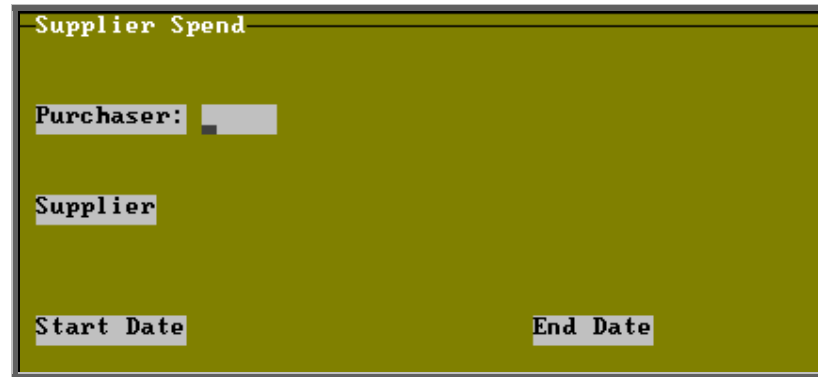
You then have the option to print the invoices listed on the report if required.



39. Financial report – Supplier Spend

Menu: Reports – Financial – Batches – Supplier Spend

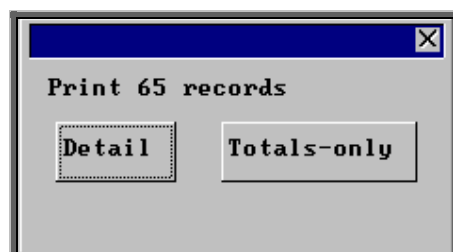
The **Supplier Spend** report gives details of expenditure broken down by supplier. The information can be broken down by Orthosis Code or Directorate.

The screenshot shows a green rectangular window titled "Supplier Spend". Inside the window, there are four input fields: "Purchaser:" with a small dropdown arrow, "Supplier" with a dropdown arrow, "Start Date", and "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 the **Supplier** required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the **Supplier** field empty will result in all suppliers 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

The screenshot shows a dialog box titled "Which Supplier Spend Report?". It contains the text "Current selection has 18 records" and two buttons: "Costcodes" and "Directorate".

Select how you want the information to be analysed i.e. by **Costcodes** (Orthosis codes) or **Directorate**

The screenshot shows a dialog box titled "Print 65 records". It contains two buttons: "Detail" and "Totals-only".

You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

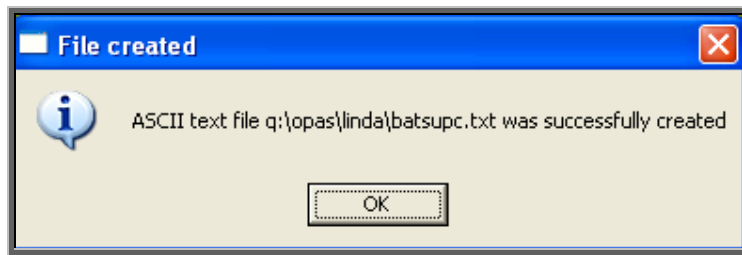
Printer

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

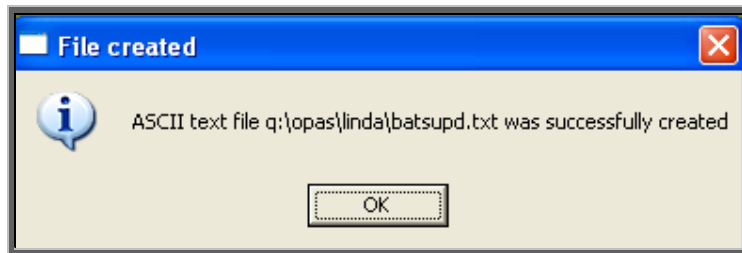
New User NHS Trust Amount Spent by Cost Code 01/ 01/ 2000 to 31/ 12/ 2003						
Supplier		Order No	Cost Code	Cost :		
004	A C Andrews Surgical Foot	EXT00401	ABC123	425.25		
	A C Andrews Surgical Foot	EXT00402	ABC123	0.00		
Total for Supplier				425.25		
				Count 2		
008	Bolton Bros. (Surg. Shoema	2343234er	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	G00376/ R2	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	G00376/ R1	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	G00376	ABC123	6.78		
	Bolton Bros. (Surg. Shoema	G00376/ R3	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	EXT00394	ABC123	44.00		
Total for Supplier				50.78		
				Count 6		

File

A comma separated variable file will be created called **batsupc.txt** when analysed by Costcode, and **batsupd.txt** when analysed by Directorate. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



When report analysed by
Cost Code



When report analysed by
Directorate

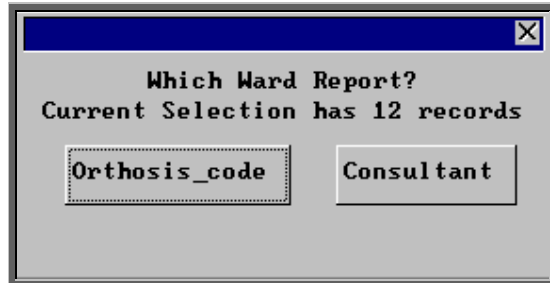
40. Financial report – Wards

Menu: Reports – Financial – Batches – Wards

This report interrogates orders by the information held in the *Ward* field.

- 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 the **Ward** required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the **Ward** field empty will result in all wards 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
- choose whether you want the information to be sub-totalled by **Orthosis code** or **Consultant**



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

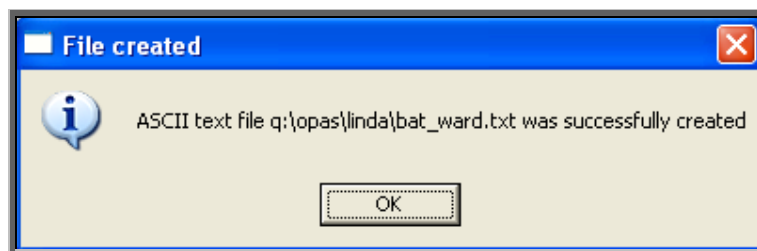
Printer

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

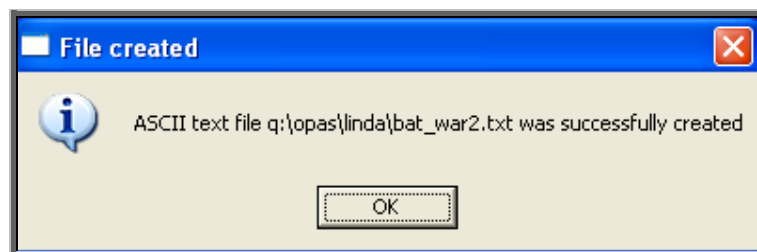
Barnsley District General Hospital						
Ward Report						
01/01/2000-31/03/2003						
Order No	Orthosis Code	Ward	Consultant	Gross		
G00350	999999	Ward 1	Mr Surgeon A N Q her	14.38		
G00358				651.58		
Total				665.96		
G00373		Ward 3	Mr Surgeon	346.87		
Total for Orthosis Code: 999999				1012.83		
Count				3		
W1234	ABC123	Ward 1	Mr Surgeon	328.29		

File

A comma separated variable file will be created called **bat_ward.txt** when analysed by Orthosis Code and **bat_war2.txt** if analysed by Consultant. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



When report analysed by
Orthosis Code



When report analysed by
Consultant

41. Financial report – Workshop

Menu: Reports – Financial – Batches – Workshop

This report lists those orders that have been supplied from the Workshop (i.e. supplier 999) and shows how much time has been spent on them. (Supplier 999 is an NSI supplier set up as an internal supplier for those hospitals that have their own workshop.)



- 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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

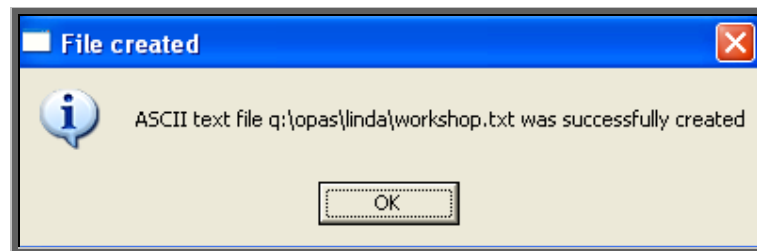
Printer

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

Order list for workshop orders supplied between 01/ 01/ 2000-31/ 12/ 2003 Printed 01/ 11/ 2003				
Hospital No	Order No	Supply Date	Technician	Time :
123456789	G00387	04/ 03/ 2003	BERT	
01232195	1234567	13/ 05/ 2002		
Total for BERT				0
Count				2
ABC21234	VM234	13/ 05/ 2002	FRED	
XYZ0987654	G00358	29/ 05/ 2002		
G9202344	G00351	13/ 05/ 2002		
Total for FRED				0
Count				3

File

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



42. Financial report – YTD (Year to Date)

Menu: Reports – Financial – Batches – YTD

The YTD report is a very complex report and can take a considerably long time to run. With this in mind we have introduced a selection criteria screen so that you can select the aspects of the YTD report that you want. The more options you select, the longer the report will take to be produced.

YTD

Purchaser [dropdown arrow]

Year **Current** **Previous** **By:** **YTD** **MTD**

Month **Apr** **May** **Jun** **Jul** **Aug** **Sep** **Oct** **Nov** **Dec** **Jan** **Feb** **Mar**

Perform Consultant Analysis? **No** **Yes**

- 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 **Current** year or **Previous** year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select the **Month** (it will default to last month). Use the space bar to move between options
- select whether to **Perform Referrer Analysis** (this will give you the monthly spend, monthly budget and cumulative YTD spend for each Referrer)
- select whether you want to report on orders **Ordered** within the period (i.e. using date of order) or those **Received** within that time. Use the space bar to move between options

field [By:]

→ **Ordered** **Received**

- select **YTD** (Year to Date) or **MTD** (Month to Date)

You will then be taken to the following selection screen:

YTD Selection									
Calculation	Year To Date			Current Month					
	Count	Net	Gross	Count	Net	Gross			
Cumulative orders	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Not received	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Not cleared	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Cleared	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			
Cleared this year	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No			

OK to continue?

This screen is used to select the required calculations for the YTD report.
 Selecting fewer calculations will speed up the report production, but will also result in less information on the report.

All the options will default to Yes. Move around the table with the down arrow key, changing those options you don't need to No by pressing the space bar.

Cumulative orders

will show the total number of orders (entered or received – depending what you selected), total net amount and total gross amount, for the year to date and the current month, if selection left at Yes.

Not received

will show the number of orders, total net amount and total gross amount for orders not received, for the year to date and the current month, if selection is left at Yes.

Note: This option is not applicable if you have selected Received.

Not cleared

will show the number of orders, total net amount and total gross amount for orders where the invoice has not been received, for the year to date and the current month, if selection left at Yes.

Cleared

will show the number of orders, total net amount and total gross amount for orders where the goods and the invoice have been received, for the year to date and the current month, if selection is left at Yes.

Cleared this year

will show the number of orders, total net amount and total gross amount for orders where the goods and the invoice have been received within the period selected, for the year to date and the current month, if selection is left at Yes.

Note: This option is only applicable if you have selected Received

OK to continue

Highlight Yes and press the **Enter** key when you are happy with your selection criteria.

YTD report produced
selecting Ordered, YTD and
leaving all options as Yes

New User NHS Trust
Year To Date Summary Report
Purchaser : NHS TRUST
Printed : 30/08/2000

	YTD (01/04/2000 - 31/07/2000)			Current month (Jul)		
	Orders	Net Value	Gross Value	Orders	Net Value	Gross Value
Cumulative Total Orders placed :	13	£3,116.39	£3,661.76	4	£1,915.29	£2,250.46
Goods ordered - not received :	2	£1,068.00	£1,254.90	2	£1,068.00	£1,254.90
Goods received - not cleared :	5	£1,312.74	£1,542.46	1	£519.00	£609.82
Goods received - cleared :	6	£735.65	£864.40	1	£328.29	£385.74

YTD report produced
selecting Received, YTD and
leaving all options as Yes

New User NHS Trust
Year To Date Summary Report
Purchaser : NHS TRUST
Printed : 30/08/2000

	YTD (01/04/2000 - 31/07/2000)			Current month (Jul)		
	Orders	Net Value	Gross Value	Orders	Net Value	Gross Value
Total Orders received :	11	1,771.96	2,082.06	2	959.72	1,127.67
Orders - not cleared :	5	1,036.31	1,217.66	1	631.43	741.93
Orders - cleared current :	2	222.25	261.15	0	0.00	0.00
Orders - cleared other :	4	513.40	603.25	1	328.29	385.74

YTD report produced
selecting Received, MTD and
leaving all options as Yes

New User NHS Trust
Month To Date Summary Report
All Purchasers
Printed : 01/11/2003

	MTD (01/04/2003 - 30/04/2003)		
	Orders	Net Value	Gross Value
Total Orders received :	15	1,886.48	2,216.61
Orders - not cleared :	11	1,284.62	1,509.43
Orders - cleared current :	2	67.14	78.89
Orders - cleared other :	2	534.72	628.29

When the report is run on Received (like the 2 examples on this page), the report identifies between those orders where the invoices were passed in the same month as they were received (Orders – cleared current) and those where the invoices were passed in other months (Orders – cleared other).

43. Patients reports – Batches

Batch reports are report templates that are designed to be quick and easy to run. There are currently 3 different batch reports analysing patient information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

44. Patients report – Amputee

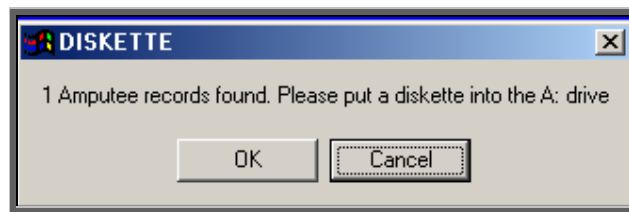
Menu: Reports – Patients – Amputee

This screen is used to select the criteria for producing the National Amputee Statistics disk. Make sure you have a disk available before you continue.

- select Current or Previous Year (the year runs from Jan – Dec)
- select the appropriate Quarter from the pop-up list

Quarter	Start Date	End Date	Month
1	1 Jan	31 Mar	Mar
2	1 Apr	30 Jun	Jun
3	1 Jul	30 Sep	Sep
4	1 Oct	31 Dec	Dec

- the Start and End dates will fill automatically, based on the Year and Quarter selected
- press **Ctrl-Enter** to continue



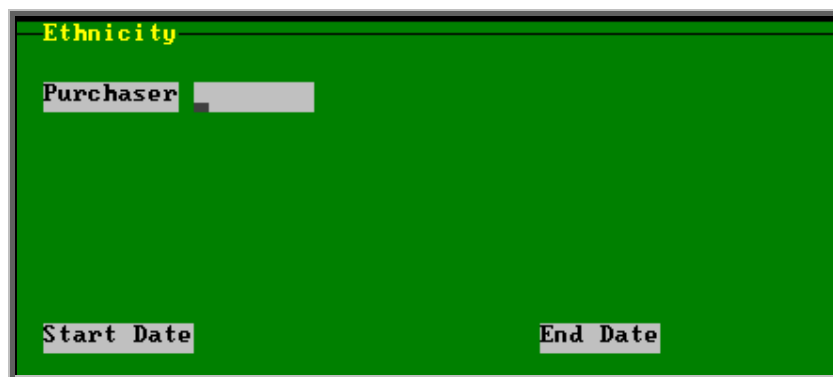
- place a disk in your computer and click on OK
- you will be informed when all the data has been transferred to the disk



45. Patients report – Ethnicity

Menu: Reports – Patients – Ethnicity

This report will look at patients entered between the date range selected and analyse the ethnicity of those patients. The results will be displayed in spreadsheet format.

A screenshot of a report form titled "Ethnicity" in yellow text on a green background. The form has three input fields: "Purchaser" with a dropdown arrow, "Start Date", and "End Date".

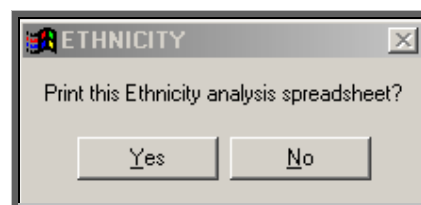
- select the **Purchaser** required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- enter the **Start date** of the required date range in the format DD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

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

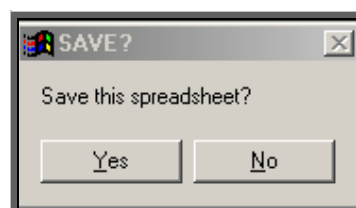
Below is an example of a spreadsheet produced by selecting the Ethnicity report

	1	2
1	Ethnicity analysis	
2	ALL PURCHASERS	
3	01/01/1999 - 31/12/2003	
4		
5	Ethnicity Code	Count
6	-----	-----
7	00	5
8	01	1,845
9	02	8
10	04	8
11	-----	-----
12		1,866.00
13		=====
14		
15	Printed 1/11/2003 by LINDA	
16		

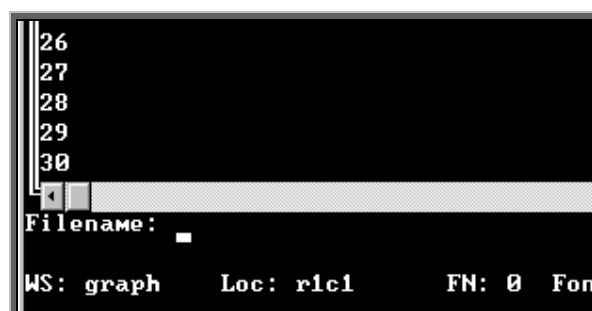
You will be asked if you wish to print the spreadsheet.



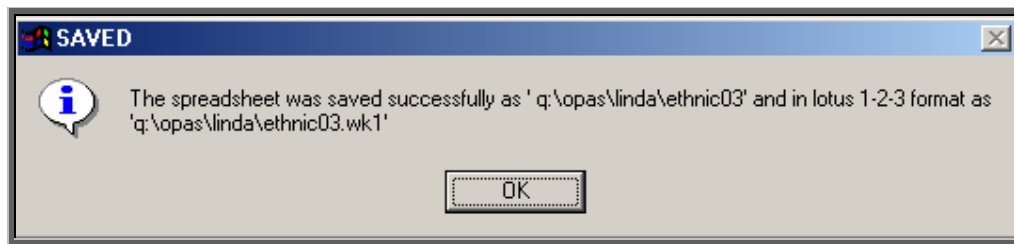
You will then be asked if you wish to save the spreadsheet.



If you select **Yes**, you need to enter a filename at the bottom of the screen.



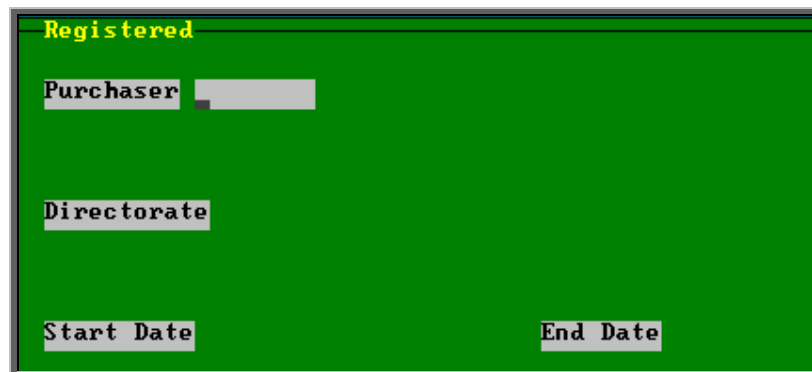
This will then be saved with that name within your personal directory of OPAS.



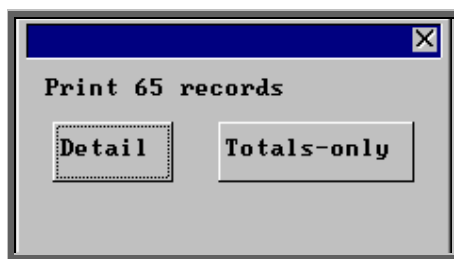
46. Patients report – Registered

Menu: Reports – Patients – Registered

The **Registered** report gives details of patients registered (i.e. entered onto OPAS) within a specific time period.



- 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 the **Directorate** required 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

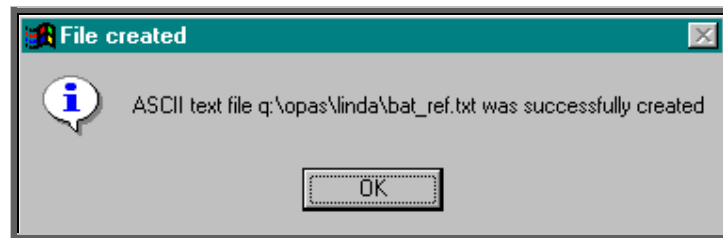
Printer

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

Purchaser	Directorate	Hospital No	Surname	Registered:	GP ref
		KL123456	YALE	29/ 04/ 2002	
		1134939	WATTERSON	08/ 10/ 2002	E629
		FRESC123	WHOSANE	05/ 11/ 2002	
Directorate Total					
Count 3					
	PCT	G8221217	JONES	15/ 01/ 2001	G8310517
		G8373080	FREDRI CK	25/ 11/ 2002	G8399420
		G8809404	HALFH DE	25/ 11/ 2002	G8399420
Directorate Total					
Count 3					
	Trauma & Orthopaedic	FRED0123	BLOGGS	25/ 01/ 2000	
		TMP000005	BLOGGS	25/ 01/ 2000	
		98765TYU7	BLOGGS	11/ 04/ 2000	
		7654321	BLOGGS	11/ 04/ 2000	
		G8901446	YOUNG	28/ 09/ 2000	

File

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



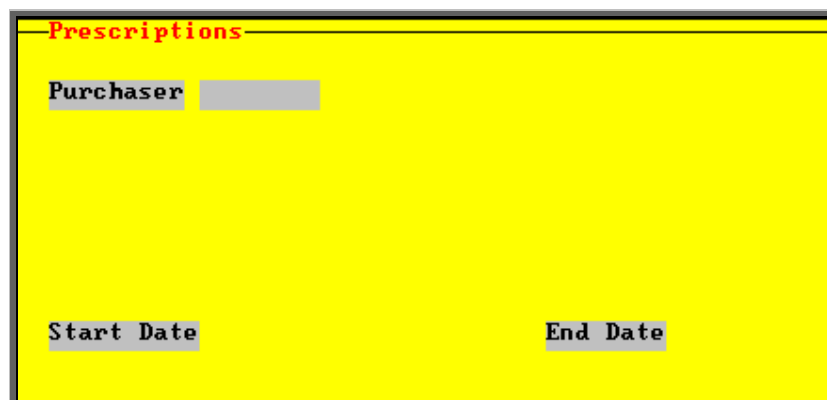
47. Prescriptions reports – Batches

Batch reports are report templates that are designed to be quick and easy to run. There are currently 3 different batch reports analysing prescription information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

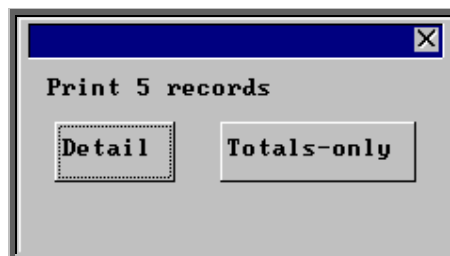
48. Prescriptions report – Charges

Menu: Reports – Prescriptions – Charges

On the order screen you have the ability to record details of prescriptions paid. The **Charges** report will show this information covering a specific period in time.

A screenshot of a software form titled "Prescriptions" in red text at the top left. The form has a yellow background. It contains three input fields: "Purchaser" at the top, and "Start Date" and "End Date" at the bottom. Each label is in a grey box, and the input area is a light grey rectangle.

- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

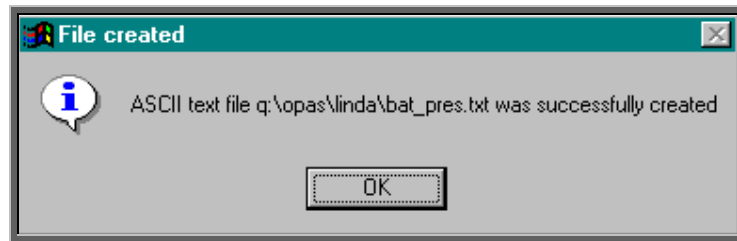
Printer

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

Prescription Charges Collected 01/ 01/ 2001 - 31/ 12/ 2002					
Patient Name	Hospital No	Order No	Orthosis Code	Date of Order	Amount :
DI EYRE	G8355370	23456	999999	05/ 06/ 2001	12.10
JEANETTE HAMILTON	01232195	1234567		11/ 07/ 2001	12.10
MRS TESSA SMITH	TCRL6004	G00373		14/ 08/ 2002	35.20
Total for Code					59.40

File

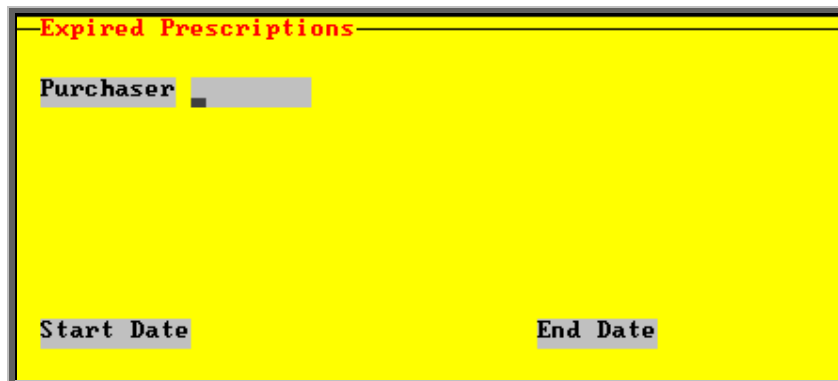
A comma separated variable file will be created called **bat_pres.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



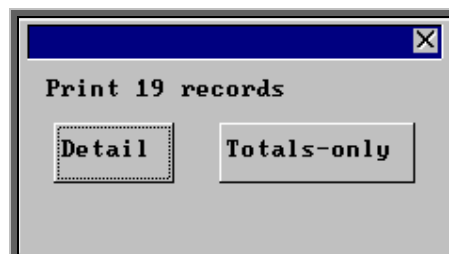
49. Prescriptions report – Expired

Menu: Reports – Prescriptions – Expired

This report will provide a list of prescriptions that have expired between the chosen dates.



- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

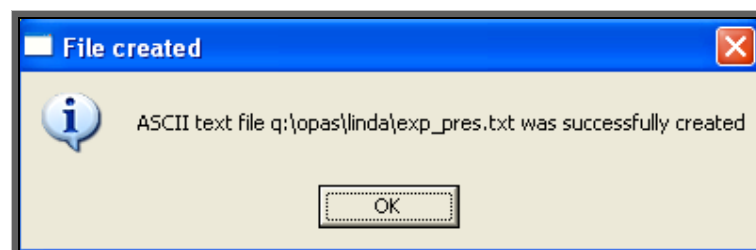
Printer

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

Prescriptions that expired between 01/02/2003 - 28/02/2003				
Patient	Hosp No	Date:	Length	Expired
ELOGGS, FRED	XYZ0987654	01/02/1998	5	01/02/2003

File

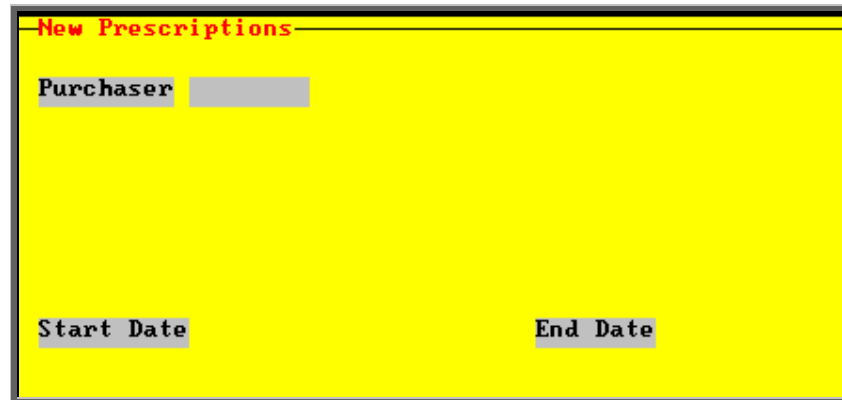
A comma separated variable file will be created called **exp_pres.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



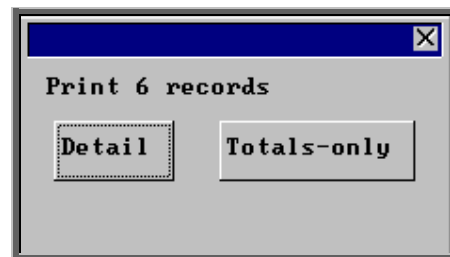
50. Prescriptions report – New

Menu: Reports – Prescriptions – New

This report will provide a list of new prescriptions that have been entered between the chosen dates.



- 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



You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

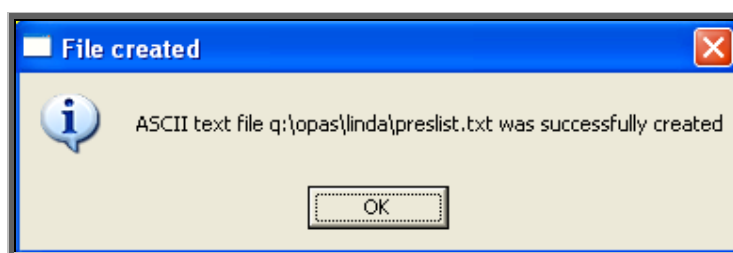
Printer

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

Prescriptions added to system between 01/01/2003 - 31/03/2003			
Consultant	Patient	Hbsp No	Length
M Surgeon, Trauma & Orthopaedic	ELOWED, ALBY	TMP000025	1
M Surgeon, Trauma & Orthopaedic	WIOSANE, NASSER	PRESC123	1
M Surgeon, Trauma & Orthopaedic	WIOSANE, NASSER	PRESC123	1
M Surgeon, Trauma & Orthopaedic	WIOSANE, NASSER	PRESC123	1
M Surgeon, Trauma & Orthopaedic	SMITH, TESSA	TORUS004	1
M Surgeon, Trauma & Orthopaedic	PAWSON, LINDA	LKP12345	3
Trauma & Orthopaedic Ont 6			

File

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



Utilities

1. **Choices – Introduction**
2. **Choices – Appointment**
3. **Choices – Classes**
4. **Choices – Classify**
5. **Choices – Clinician**
6. **Choices – Contacts**
7. **Choices – Days**
8. **Choices – Defaults**
9. **Choices – Descriptions**
10. **Choices – Diagnosis**
11. **Choices – Directorates**
12. **Choices – Discounts**
13. **Choices – DOR**
14. **Choices – DSCs**
15. **Choices – E-mails**
16. **Choices – Ethnicity**
17. **Choices – Fax**

- 18. Choices – Fitting**
- 19. Choices – GPs**
- 20. Choices – Initiators**
- 21. Choices – Intervention**
- 22. Choices – Items**
- 23. Choices – Letters**
- 24. Choices – Manufacture**
- 25. Choices – Medical Conditions**
- 26. Choices – Nominal**
- 27. Choices – Note Categories**
- 28. Choices – Orthosis Codes**
- 29. Choices – Prices**
- 30. Choices – Printers**
- 31. Choices – Prosthetics**
- 32. Choices – Purchaser Codes**
- 33. Choices – Purchasers**
- 34. Choices – Purchasing Card**
- 35. Choices – Referrers**

- 36. Choices – Referrer Types**
- 37. Choices – Suppliers**
- 38. Choices – System**
- 39. Choices – Technicians**
- 40. Choices – Titles**
- 41. Choices – Transport**
- 42. Choices – Wait Types**
- 43. Choices – Wards**
- 44. Ex-patients**
- 45. File Fix**
- 46. Messages**
- 47. NSI**
- 48. OPrice**
- 49. Order Numbers**
- 50. PAS Link**
- 51. Password**
- 52. Portable**
- 53. Training**

54. Upgrade

55. Users

56. Version

57. Who

1. Choices – Introduction

Menu: Utilities – Choices

There are a number of options within **Choices**, which will be covered in detail below.

Choices options are used to customise OPAS. This is where you can enter what is to appear in the pop-up menus that appear throughout the software. Some options need to be entered before the system can be used, since they are referred to by the system when patients, orders etc are entered, but this will be explained in your initial training session.

Most of these options will be completed during the first few months; however you may need to change them or add to them over time and you need to be aware of where this reference data is kept and how to update it.

This section also includes an option to update the layout of letters.

2. Choices – Appointment


1. Appointment Outcome

Menu: Utilities – Choices – Appointment – Appointment Outcome

Enter here all the standard appointment outcomes that you would want to use to record the results of appointments. Four will be set up for you.

- 1 Attended
- 2 Did not attend
- 3 Could not attend
- 4 Cancelled by hospital

To add a new Appointment Outcome click on the 'enter' icon  (or Edit, Enter)

To update an existing Appointment Outcome, find the Outcome you wish to change and click on the 'update' icon  (or Edit, Uppdate).

2. Events

Menu: **Utilities – Choices – Appointment – Events**

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**.

See notes 4 and 5 below for how to set up the **Questions and Responses**.

Setting up the 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 disappear 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.

3. Event Types

Event Types is currently under development.

4. 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.

5. 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 satisfication of the answer)

Continue until all the reponses have been entered.

6. Review Outcomes

Review Outcomes is currently under development.


3. Choices – Classes

Menu: Utilities - Choices - Classes

Items and orthosis codes can be linked to a classification. *Classes* is a method of grouping a number of items together. By attaching classes to both items and orthosis codes a link is created. (See Utilities - Note 4. Classify and Utilities - Note 28. Orthosis codes)

The purpose for this is to show if an orthosis code is applied to an order incorrectly. E.g. If an orthosis code that is linked to class A is entered on an order where the item code is linked to class B, this will show as a mis-match by highlighting the orthosis code red on the order and invoice screen.

		Orthosis Code	Qty	Price
Footwear	Standard Boot	ABC123	\$ 1	77.00
Footwear	Standard Boot	ABC123	\$ 1	72.00

To add a new Classification, click on the 'enter' icon  (or Edit, Enter)


Class: enter a classification identifier (letter A to Z)

Description: enter the description of the classification

4. Choices – Classify

Menu: Utilities - Choices - Classify

This screen is used to allocate the classifications created in Utilities – Choices – Classes to specific items.

To bring in your OPrice schedule numbers so that they can be classified, click on the 'enter' icon  (or Edit, Enter).

Classifying individual items

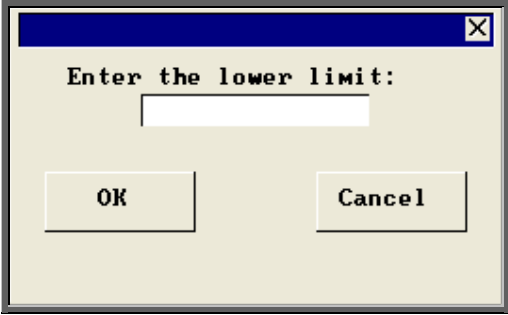
Each schedule number can be classified individually by finding the relevant number

and clicking on the 'update' icon  (or Edit, Update), and selecting the appropriate classification from the pop-up list.

Classifying a block of items

Alternatively, we can find a range of codes and allocate a classification in bulk. To do

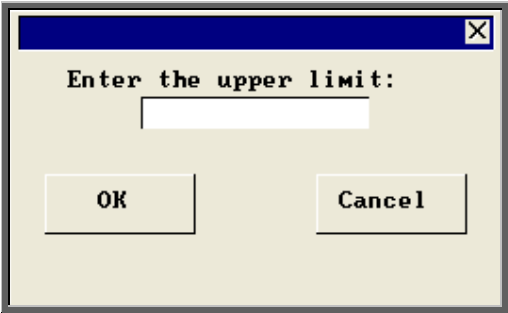
this, click on the 'sort' icon  (or Sort), and select Code and then Range.



Enter the lower limit:

OK Cancel

enter the first code in the range

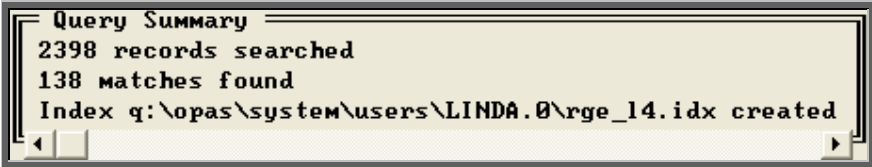


Enter the upper limit:

OK Cancel

enter the last code in the range

- Once the records in your range have been found a Query Summary box will indicate the number of matches found, and isolate those items.




Query Summary

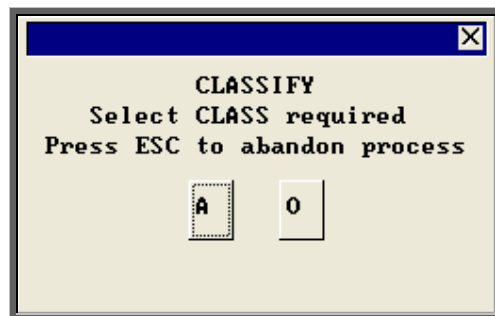
2398 records searched

138 matches found

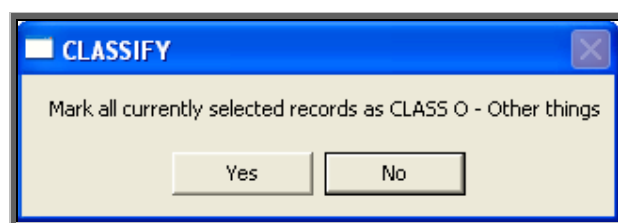
Index q:\opas\system\users\LINDA.0\rge_14.idx created

- Press **Esc** to remove the Query Summary box.

- Click on the 'update' icon  (or Edit, Update) and choose the appropriate classification code from the prompt.




- Click on Yes (or type Y) to confirm your selection.



5. Choices – Clinicians

Menu: Utilities - Choices - Clinicians

This is a list of personnel who hold clinics or see patients.


To add a Clinician, click on the 'enter' icon  (or Edit, Enter).


<i>Reference</i>	is entered automatically by the system and cannot be changed
<i>Clinician</i>	enter the Clinician's name
<i>Expertise</i>	move the highlight using the space bar until the correct expertise is selected
<i>Source</i>	enter whether the Clinician is in-house or which contractor they are from
<i>Fee</i>	if there is a set fee for the Clinician, this can be entered here

6. Choices – Contacts

Menu: Utilities – Choices - Contacts

On the patient record you can add Carbon Copy recipients for the purpose of sending copies of the appointment letter internally to individuals who need to be notified of the appointment e.g. a physiotherapist involved with the patient's care. Those people who you would wish to be add to a patient as a Carbon Copy recipient need to be set up here.

To add a new Contact click on the 'enter' icon  (or Edit, Enter)

To update an existing Contact, find the Contact you wish to change and click on the 'update' icon  (or Edit, Update).

<i>Reference</i>	Reference is entered automatically
<i>Name</i>	Enter the contacts name
<i>Position</i>	Enter their position/job title e.g. Physiotherapist
<i>Location</i>	enter the department where they work e.g. Rehabilitation
<i>Add1 - Add4</i>	4 address lines available for when the contact is external

7. Choices – Days

Menu: Utilities – Choices - Days

This holds the names of the days on which clinics are held. Monday to Friday have been set up for you.

8. Choices – Defaults

Menu: Utilities – Choices - Defaults

When entering information, there are certain fields that when you move to, automatically produce a pop-up list on the screen for you to make your selection from.

By going into **Utilities – Choices – Defaults**, you can decide which pop-ups appear automatically and which only appear if you press the **Tab** key.

Also, if you usually put the same information in a particular field, then the field can be set to default to that rather than having to pick it from the list or type it every time.

When you go into the **Defaults** screen you will be presented with a record for each field that you can control.

The first four fields are for your information and cannot be changed.

<i>Number</i>	Reference number
<i>Screen</i>	The screen the field appears in
<i>Field</i>	The field name
<i>Pop-up</i>	This informs you if there is a pop-up available for this field
<i>Default</i>	This is the part that you can change to control what happens when you get to the specified field.

- If the word POP is entered in the *Default* field the pop-up will automatically appear
- If the *Default* field is left blank then the pop-up will not automatically appear, and you will need to press the **Tab** key to see the pop-up list.
- If you wish information to automatically appear in the field this needs to be entered in the *Default* field.
 - i) if the field does not have a pop-up (i.e. Town) then enter the word you wish to appear automatically i.e. York.
 - ii) if the field does have a pop-up available (i.e. Supplier) then enter the reference number you wish to default to. e.g. if you only use one supplier then enter the supplier code in the *Default* field.

To amend the information in the *Default* field click on the 'update'



icon (or **E**dit, **U**pdate). You will be asked at the bottom of the screen what you would like to change the *Default* field to. Type in the relevant information, or, if you wish the *Default* field to be left blank so that the pop-ups do not appear for that field, then just press


Enter.


There are currently 45 defaults that can be customised. These will normally be done for you during training sessions. If you are in any doubt how to change the defaults, contact the Helpdesk for advice.

9. Choices – Descriptions

Menu: Utilities – Choices – Descriptions

The *Description* field appears on the order and prescription screens. To create a pop-up list for the field, create your standard descriptions here.

To add a new Description click on the ‘enter’ icon  (or Edit, Enter)


To update an existing Description, find the Description you wish to change and click on the ‘update’ icon  (or Edit, Update).


10. Choices – Diagnosis

Diagnosis is currently under development.

11. Choices – Directorates

Menu: Utilities – Choices – Directorates

To add a new Directorate click on the ‘enter’ icon  (or Edit, Enter)

To update an existing Directorate, find the Directorate you wish to change and click on the ‘update’ icon  (or Edit, Update).

Directorate enter the directorate name

Group this enables you to group directorates together (useful for reporting purposes).

Speccode enter the financial speciality code that is associated with the directorate

Card enter the purchasing card number and expiry date where applicable


The directorates set up here will provide a pop-up list to choose from when adding Referrers.

12. Choices – Discounts

Menu: **Utilities – Choices - Discounts**

This is used to enter details of any suppliers who give you a discount on any of their items.

Previously only one set discount per supplier could be applied. Now you can apply discounts within ranges of schedule numbers.

When adding a new discount click on the 'enter' icon  (or Edit, Enter).

Select the supplier name from the list offered.

You will then be taken to the *Discount* field. If the discount with the supplier is the same for all items, then enter the discount in this field. If, however, you have multiple discounts or only receive discounts on certain items then leave this field blank and press the Enter key to move into the *Bands* table.

Within the *Bands* table you can define the discount structure you receive.

e.g.
You get 5% discount on just readymade shoes ('A' schedule no's)
Enter A in the *From* field
Enter Az in the *To* field
Enter 0.05 in the *Disc* field

Bands		
From	To	Disc
A	Az	5.00%

Once you have entered the applicable discounts all related prices will be updated so that when orders are added the price that appears is the discounted price.

13. Choices – DOR

Menu: **Utilities – Choices - DOR**

The Districts of Residence (i.e. Health Authorities) of the patients have been included for you. When adding a new patient onto OPAS, if a valid postcode is entered in the patient's address, the relevant DOR will automatically be added to the patient record.

If you wish to update the description of the DOR's for your area, find the relevant




DOR and click on the 'update' icon (or Edit, Update). Move to the *Description* field. Press **F8** to remove the contents of the field and type in the correct *Description*.

14. Choices – DSCs

Menu: **Utilities – Choices – DSCs**

The national Disablement Service Centres are listed here.

If you need to add new DSC's, click on the 'enter' icon  (or Edit, Enter).


Code enter the code for the DSC

Name enter the name of the DSC

15. Choices – E-mails

Menu: **Utilities – Choices – E-mails**

Within the system parameters (**Utilities – Choices – System**) you can specify that you want to switch on the function to e-mail orders (providing you have the necessary fax hardware/software on your PC).

To specify suppliers for e-mailing, click on the 'enter' icon  (or Edit, Enter).

Code find the supplier in the pop up list and press **Enter**.

Address: type in the e-mail address for the supplier.

16. Choices – Ethnicity

Menu: **Utilities – Choices – Ethnicity**

If it is required to classify patients by their ethnic origins click on the ‘enter’ icon



(or Edit, Enter) and enter the codes and descriptions that will be used.

To update an existing Ethnic Origin, find the Ethnic Origin you wish to change and




click on the ‘update’ icon (or Edit, Update).

17. Choices – Fax

Menu: **Utilities – Choices – Fax**

Within the system parameters (**Utilities – Choices – System**) you can specify a fax printer driver which would mean that orders would be faxed directly from your computer to the supplier (providing you have the necessary fax hardware/software on your PC).

If you wish to fax orders to all suppliers then leave this screen blank. Otherwise, specify those suppliers you wish to fax to by adding them in this screen.

To specify particular suppliers for faxing, click on the ‘enter’ icon  (or Edit, Enter).


Find the supplier in the pop up list and press **Enter**.


That supplier will be added and the pop up list will appear again to choose another supplier. Continue to select suppliers until you have specified all those that you wish to fax to. Then press **Esc** to remove the pop up list and then press **Esc** twice more to come out of the **Fax** screen.

18. Choices – Fitting

Menu: **Utilities – Choices - Fitting**

Fitting and Selling prices can be entered here for external purchasers, if required. However, if on an order no fitting or selling prices are found for an item, they can be entered manually on the invoice.

To add fitting and selling prices for an item, click on the ‘enter’ icon  (or Edit, Enter).

To update existing fitting and selling prices, find the item you wish to change and click on the ‘update’ icon  (or Edit, Update).

Itemcode is the item code (schedule number) as in the Prices list. The code must be present in the OPRICE list or in the NSI list

Selling is the price at which you will sell this item on

Fitting is any additional fitting charge for this item (or could be used without a selling price for a fitting charge on its own)


Description is your description of the item that is being sold

19. Choices – GPs

GPs

Menu: **Utilities – Choices – GPs - GPs**

This is the standard list of over 30,000 UK GPs as supplied by the NHS and is updated when you receive upgrades to OPAS. If you add a new GP who is not on the list, or amend the details for an existing GP, be aware that when the list is updated, the changes you have made will be lost. However, any new GPs should now be on the updated list. Wynnlogde Limited are sent updates to the GP list on a quarterly basis. If you would like an update to your GP information between upgrades please contact the Helpdesk to request the latest GP CD. (The information has to sent on a CD as there is too much data to be held on a 3 ½ floppy disk)

To add a new GP click on the 'enter' icon  (or Edit, Enter)

Count is automatically entered by the system and cannot be changed

Reference is the GPs FHSA reference


Doctor is the GP's name and must be entered as e.g. **WILSON A**, not **DR A WILSON**, so that the list can be put correctly into alphabetical order

GP Code is normally entered as the FHSA reference (same as *Reference*)

PCTs

Menu: Utilities – Choices – GPs - PCTs


This holds details of the Primary Care Trusts.

Click on the 'GP' icon  (or GPs) to see the GPs in the Primary Care Trust that is currently on the screen.

Click on Practices to see the Practices in the Primary Care Trust that is on the screen.

Practices

Menu: Utilities – Choices – GPs - Practices

Click on the 'GP' icon  (or GPs) to see the GPs in the Practice that is currently on the screen.

20. Choices – Initiators

Initiators is currently under development.

21. Choices – Intervention

Intervention is currently under development.


22. Choices – Items


Menu: Utilities - Choices - Items


This is the list of items supplied to patients and comprises both the OPRICE list and additional NSI and Stock items.


Do not update these records because any changes will be lost when the prices are rebuilt. New items should be added in **Utilities – NSI – Items** (see **Utilities - Note 4. NSI**).

If you would like to compare prices for a particular item:

find the relevant item and then click on the ‘prices/suppliers’ icon  (or **P**rices) to see details of the suppliers of that item and their prices.

To see the information as a list on the screen click on the ‘browse’ icon  (or **D**ata, **B**rowse).

To print the information click on the ‘print’ icon  (or **F**ile, **P**rint) and select **Custom Report**. At the top of the screen select **T**his_view. Highlight **PLIST** and click on **R**un. A print box will appear which defaults to 1 copy to the printer. If you require more than one copy simply change the number in the copies box. Click on **OK** to continue or **Cancel** to abort the print.

To return to the item screen, click on the ‘exit’ icon  (or **F**ile, **R**eturn).

23. Choices – Letters



Menu: Utilities - Choices - Letters

This is where all your letter templates are kept. There are different letter types for using from different areas of OPAS. When you go into the letter screen all the types of letters will be listed alphabetically by short name.

Collection Letters	COLLECTA to COLLECTZ 26 standard letters which can be sent to patients to inform them that their items are ready for collection.
Condition Letters	CONDITA to CONDITZ 26 standard letters that can be sent to patients from the medical conditions screen. These are specifically for targeting those patients with a particular medical condition.
DNA Letters	DNA_CONA to DNA_CONZ 26 standard letters to inform Referrers of patient DNA's (Did not attends) DNA_GPA to DNA_GPZ 26 standard letters to inform GPs of patient DNA's DNA_PATA to DNA_PATZ 26 standard letters to patients that have DNA'd
Enquiry Letters	ENQUIRYA to ENQUIRYZ 26 standard letters that can be sent to private patients that are making an initial enquiry regarding treatment
GP Letters	GPLETA to GPLETZ You can create 26 standard letters to send to GPs
HSA5	Template for National Health Service Form HSA5 (Supply of Drugs and Elastic Hosiery)
Appointment Letters	LETTERA to LETTERZ 26 standard letters that can be sent to patients to advise them of their appointment.
Order Letters	ORDLETA to ORDLETZ 26 standard letters that can be sent to patients about their order.
Patient Letters	PATLETA to PATLETZ 26 standard letters that can be sent to patients.

PCG Letters	PCGLETA to PCGLETZ 26 standard letters that can be sent to PCGs.
Practice Letters	PRACLETA to PRACLETZ 26 standard letters that can be sent to GP Practices.
Reminder Letters	REMINDA to REMINDZ 26 standard letters that can be sent to patients to remind them about their appointment.
TRANS	Internal transport memo for booking patient transport for appointments.
UNCOLL	Collection reminder letter.
WAITLIST	Waiting List letter
WF1	Template for National Health Service Form WF1 (Supply of Wigs and Fabric Supports)

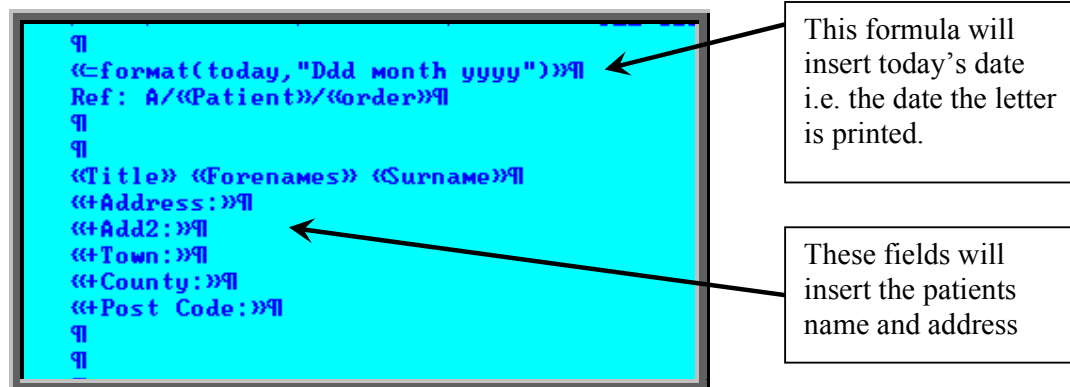
Editing Letters

Move the green highlight so that it is on the letter that you wish to edit. Once you have highlighted the relevant letter click on the 'paper and pencil' icon  (or WP) to see the letter. Then click on the 'four coloured squares' icon  (or Wordprocessor) to be able to edit the letter.

You now have access to a full range of word processing facilities: however you will probably only need basic typing in order to change the layout of the letter.

Move around the document with the cursor keys, **PgUp** and **PgDn**.

Some of the text of the letter is enclosed in chevrons: this is either a formula or a field name that will be replaced by specific data from the patient, order or appointment record.



Please do not alter any text within chevrons unless you are happy that you know what you are doing. To type the opening squiggly brackets press **Ctrl-J** (i.e. Ctrl and J keys together) and for the closing squiggly brackets press **Ctrl-K**.

Text you no longer want in the letter can be deleted. From the cursor position, **Backspace** deletes to the left and **Delete** deletes to the right.

Before you type text, it may be made bold by pressing **Ctrl-B**.

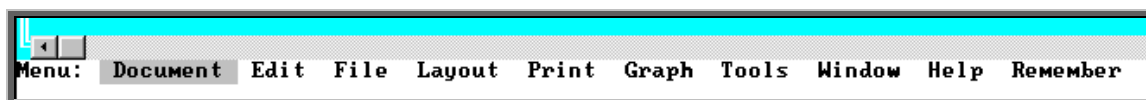
Bold is turned off by pressing **Ctrl-B** again.

Similarly, underscoring is turned on and off with **Ctrl-U**.

If you wish to select a different font for the text before you start typing, press **F6** three times and then select from any of the fonts installed on your PC. Once you have positioned the cursor at the font you wish to use press **F10** twice.

Changing the properties of existing text

Press the **Esc** key to bring up the word processing menu at the foot of the screen.



To make existing text **BOLD**:

Move your cursor to the start of the text you wish to make bold
 click on Layout (or type L)
 click on Font (or type F)
 click on Bold (or type B)
 click on Insert (or type I)
 use the arrow keys to highlight the text you want to make bold and then
 press **Enter**

To make existing text Underscored:


Move your cursor to the start of the text you wish to underscore
click on **Layout** (or type L)
click on **Font** (or type F)
click on **Underscore** (or type U)
click on **Insert** (or type I)
use the arrow keys to highlight the text you want to underscore and then
press **Enter**


To change the font of existing text:

Move your cursor to the start of the text you wish to change
click on **Layout** (or type L)
click on **Font** (or type F)
click on **Change** (or type C)
use the arrow keys to highlight the text you want to change and then press
Enter
A list of fonts already used in the letter will appear. If the font you want
to use is in the list, move the cursor so that it is pointing at the required
font and press **Enter**. If you want to use a different font then press **F6**
twice, move the cursor so that it is pointing at the required font and press
F10 twice.

While you are editing a letter, it can be printed to check the layout by clicking on the

‘print’ icon  (or **F**ile, **P**rint) and clicking on OK.


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

File, **E**xit), and then click on the ‘exit with a question mark’ icon  (or **R**eturn).

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**.

24. Choices – Manufacture


This option is for hospitals that have on site workshops, where appliances are made or altered. This option is used for setting up the sections/departments within the workshop.



To add a department, click on the 'enter' icon  (or Edit, Enter), type the department name and press **Ctrl-Enter**


25. Choices – Medical Conditions

Menu: **Utilities - Choices - Medical Conditions**


The conditions entered here will appear in a pop-up list when adding a note to a patient using the 'Note Category' of Dictionary. (see [Patients - Note 15. Entering medical notes](#) for more details of adding notes) and once these medical conditions have been assigned to a patient as a note the information can then be used for finding those patients with a particular condition.

To add a medical condition, click on the 'enter' icon  (or Edit, Enter), type the medical condition and press **Ctrl-Enter**

To find all the patients that have a particular medical condition assigned to them, move through the medical conditions using the 'arrow' icons  and  (or **F6** and **F5**) to find the medical condition you wish to interrogate. Then click on the

'patients' icon  (or Patients) to see all those patients that have that medical condition. Now you can look at the information on the screen, print a list of those patients, or send a pre-designed letter to those patients.

Printing a list of patients

Click on the 'print' icon  (or File, Print) and select **Custom Report** from the drop down menu.


Click on the word This_view at the top of the screen to show those reports that can be run from this screen.

Highlight the appropriate report. i.e. CONLABEL for the patient address labels or CONLIST for the patient listing, and click on Run.

A print box will appear in the middle of the screen offering to send one copy to the printer. You can amend the number of copies required or select the information to be sent to the screen instead here. To proceed, click on OK.

Sending letters to those patients



Click on the 'print' icon  (or File, Print) and select **Mail Merge** from the drop down menu.

Click on the word This_view at the top of the screen to show those letters that can be sent from this screen.

Highlight the appropriate letter and click on Run.

A message will appear informing you how many letters will be produced.



Click on OK to continue or Cancel if you wish to abandon the mail merge.



When you are asked if you would like to edit the document click on **NO** to send the letter as it is. If there are changes you want to make then click on **Yes**.


Warning: If you edit the document here, it will permanently change the letter for future use.

A print box will then appear which will give you the opportunity to change the number of copies you wish to print from 1 if necessary. Click on OK to continue.

26. Choices – Nominal

Menu: Utilities – Choices – Nominal

OPAS can be used for transferring invoice information into hospital finance systems. For costing purposes within the finance software, a nominal code can be added to each detail line within the invoice. To create a pop-up list in the nominal code field on the invoice, create the nominal codes here.

To add new Nominal codes, click on the ‘enter’ icon  (or Edit, Enter).


Code enter the nominal code

Description enter a description for the nominal code

27. Choices – Note Categories

Menu: Utilities – Choices – Note Categories

When adding a note to a patient or a note against a care episode, there is a field called *Category*. This is to enable you to categorise the type of notes that you are adding.

To add a new Category, click on the ‘enter’ icon  (or Edit, Enter).

Enter the category. Press **Ctrl-Enter** when you have finished entering the categories you require. You can come back to this screen at any time to add additional categories as they arise.

Note: Categories of ‘Dictionary’, ‘Video’, ‘Picture’ and ‘Temp’ have already been set up for you. The purpose of these are explained in [Patients - Note 15. Entering medical notes](#).

28. Choices – Orthosis Codes

Menu: Utilities – Choices - Orthosis Codes

Orthosis Code is a financial costing analysis code for a group of similar items i.e. made to measure footwear. Each hospital can use these codes as best suits them, usually in conjunction with their financial department. They can be as simple or as detailed as you require, but bear in mind that every order that is added onto OPAS must have an Orthosis code entered. If the coding structure is too complicated it may result in miscoding.

These codes must be set up before orders can be entered on to OPAS. It is worth spending some time thinking what your requirements are as they can have a direct effect on the management reports that are produced.



To add an orthosis code click on the 'enter' icon (or Edit, Enter).

- Orthosis Code* the orthosis code (up to 12 characters).
- Description* is the description you want to give to that group of items represented by that code.
- Delivery* is the normal delivery time for that group of items.
- Group* you can group orthosis codes together. i.e. you may have an orthosis code for 'custom made shoes', one for 'stock shoes' and another for 'adaptions', but they all belong to a group called 'footwear'.
- Classes* items and orthosis codes can be linked to a classification. *Classes* is working along the same principal as *Group* above, but takes it further by being able to link orthosis codes and items together.
(See Utilities - Note 3. Choices - Classes and Utilities - Note 4. Classify.) The purpose for this is to show if an orthosis code is applied to an order incorrectly. E.g. If an orthosis code that is linked to class A is entered on an order where the item code is linked to class B, this will show as a mis-match by highlighting the orthosis code red on the order and invoice screen.

			Orthosis Code	Qty	Price
Footwear	Standard	Boot	ABC123	S 1	77.00
Footwear	Standard	Boot	ABC123	S 1	72.00

An orthosis code can be linked to several classes.

29. Choices – Prices

Menu: Utilities – Choices – Prices

This is the list of prices for items supplied to patients and comprises both the OPRICE list and additional NSI and Stock prices. The screen can be used for comparing prices for a number of suppliers (see Using the Shopping Basket below).

It will also show the discounted price for that item if a discount has been applied in **Utilities – Choices – Discounts** (see **Utilities - Note 12. Choices - Discounts**)

Do not update these records because any changes will be lost when the prices are rebuilt. New prices should be added in **Utilities – NSI – Prices** (see **Utilities - Note 47. NSI**).

Using the Shopping Basket



Click on the 'printer' icon (or **F**ile, **P**rint), and choose **Shopping Basket** from the print menu.

Items select the first item you wish to find the price for from the pop-up list. Once selected, it will appear in the *Items* table.

Continue to pick items from the pop-up list until all the items you want have been selected.

Once all the items have been chosen, press **Esc** to make the pop-up list disappear and then press **Enter** to move into the *Suppliers* table

Suppliers select the first supplier you wish to find the price for from the pop-up list. Once selected, it will appear in the *Suppliers* table.

Continue to pick suppliers from the pop-up list until all the suppliers you want have been selected.

Once all the suppliers have been chosen, press **Esc** to make the pop-up list disappear and then press **Enter** to start the search.



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

Printer

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

Shopping Basket of 2 items, printed 03/11/2003					
Supplier 1: Halo Healthcare Ltd (2 items)			Supplier 2: Peacocks Medical Group Ltd		
Supplier 3: Remploy Healthcare (2 items)			Supplier 4: Jane Saunders & Manning Ltd		
Supplier 5: Blatchford Exolite Orthotic Services (2 items)					
Item	Supplier 1	Supplier 2	Supplier 3	Supplier 4	Supplier 5
B11 - Addition of a cuff to increase the upper height in a single	21.90	12.51	15.64	18.90	27.46
C11 - Restitching upper, per 25mm or part thereof	1.67	1.68	2.72	2.16	2.56
Grand Total	23.57	14.19	18.36	21.06	30.02


File

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

30. Choices – Printers



Menu: Utilities – Choices – Printers

This option gives you the ability to switch your Windows default printer from within OPAS.

To enter details of your printers, click on the ‘enter’ icon  (or Edit, Enter).

Description enter the name of the printer

Address enter the address of the printer. If the printer you are adding was the windows default when you logged into OPAS, press **Alt-F5** and the address will be pulled into the field for you.

Once your printers are defined in this screen, should you want to change you default printer, find the appropriate printer using the ‘right arrow’ icon  (or **F6**) and click on the ‘select printer’ icon  (or Select).

31. Choices – Prosthetics

Menu: Utilities – Choices – Prosthetics


This section is used for the components, prices and suppliers of prosthetic items.

This section is new in version 6 and currently under development.

32. Choices – Purchaser Codes

Menu: Utilities – Choices – Purchaser Codes

Details of the 141 Health Authority codes are held here.

If you need to add a new Health Authority code click on the ‘enter’ icon  (or Edit, Enter).

<i>HA Code</i>	enter the Health Authority code
<i>Name</i>	enter the name of the Health Authority


33. Choices – Purchasers

Menu: Utilities – Choices - Purchasers

This section holds details of bodies that purchase goods and services.

Normally the purchaser will be the NHS Trust, but you might also want to create a purchaser for GP Fundholder, to cover any GP Fundholder purchasing goods or services. Alternatively, you could enter here each individual GP Fundholder as a separate record, although this may be over-kill as the GP can be held against the patient record and that would indicate which practice they belong. You could also create a record for private patients.

Note: If your trust covers more than one site, it would be advisable to enter each site as a different purchaser. This would enable you to obtain management reports that were site specific.

To add a purchaser click on the ‘enter’ icon  (or Edit, Enter).


<i>Reference</i>	is entered automatically by the system and cannot be changed
<i>Short name</i>	the first few letters or initials of the purchaser, to enable quick selection of that purchaser
<i>Purchaser</i>	is the full name of the purchaser
<i>Address</i>	6 lines are available for the address of the purchaser

<i>Phone/Fax</i>	telephone and fax numbers of the purchaser
<i>Type</i>	enter I if the purchaser is internal, or E if the purchaser is external.
<i>Discount</i>	is entered if you give that purchaser an across-the-board discount.
<i>Sales VAT</i>	is entered as <input type="checkbox"/> Y or <input type="checkbox"/> N to indicate whether VAT is applied on invoices to this purchaser.
<i>Fitting</i>	is entered as <input type="checkbox"/> Y or <input type="checkbox"/> N to indicate whether a fitting charge is normally added to invoices to this purchaser. Such charges will come from the Fitting screen (see Utilities - Note 18. Choices - Fitting).
<i>Account Code</i>	is entered if you are producing a file containing invoice information to send to your Finance Department. It is the account code for your department that is used by the Finance Departments software.
<i>Card</i>	is entered as <input type="checkbox"/> N if the purchaser is not using purchasing cards (this is the default) or entered as <input type="checkbox"/> Y if they are.
<i>Print</i>	enter <input type="checkbox"/> Y if orders for this purchaser are to be printed. Entering <input type="checkbox"/> N will prevent orders printing in batch or instant print (if switched on).

34. Choices – Purchasing Card


Menu: Utilities – Choices – Purchasing Card

Enter the details of those suppliers that are involved in the purchasing card scheme.

To add a new supplier click on the 'enter' icon  (or Edit, Enter), and select the supplier from the pop-up list

35. Choices – Referrers


Menu: Utilities – Choices – Referrers

To add a new Referrer click on the 'enter' icon  (or Edit, Enter)

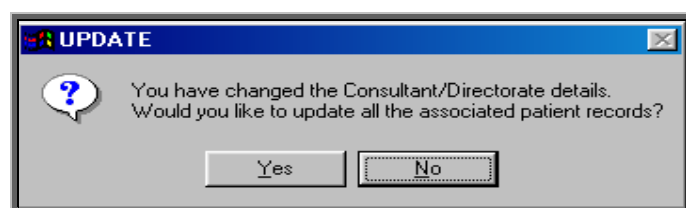
<i>Reference Referrer</i>	is entered automatically by the system and cannot be changed must be entered with the surname last e.g. Mr A Wilson rather than Wilson A , in order that the names sort correctly into alphabetical order. If the Referrer has more than one initial, ensure there is a space between them e.g. Mr A D Wilson
<i>Directorate</i>	enter the directorate the Referrer works for from the pop-up list (Directorates to appear in the pop-up should be set up in Utilities – Choices – Directorates). If a Referrer works for more than one directorate, you may want to enter a new Referrer record for each of the directorates so management reports show spend accurately.
<i>Code</i>	is often used for the Referrer's national number, or a local finance code: it must be unique. If you enter a code that you have already used, the error message 'Key value ... for data-file ... already exists' will show and you must change the code before you can save the record.
<i>Speccode</i>	is a financial code for that speciality (directorate), used for financial analysis. If you have assigned a speciality code against the directorate chosen above (in Utilities – Choices – Directorates) then the speciality code will appear automatically.
<i>Type</i>	enter the referrer type from the pop-up list (referrer types to appear in the pop-up should be set up in Utilities – Choices – Referrer Types).
<i>Budget</i>	if you know the referrers budget, it can be entered here.
<i>Card</i>	if the referrer has a purchasing card, enter the card details here. If you have assigned a purchasing card against the directorate chosen above (in Utilities – Choices – Directorates) then the card details will appear automatically.

Updating Referrer details

To update an existing Referrer, find the Referrer you wish to change and click on the

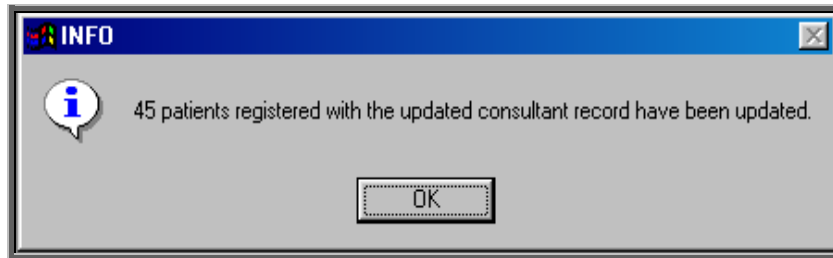
'update' icon  (or Edit, Update).

When you update Referrer details you will be asked if you would like to update the patient records, which have that Referrer assigned to them.



If you choose **No**, existing patients will continue to show the Referrer details as they were before they were edited.

If you choose **Yes**, the patient records will be updated and you will be informed when it is complete with the following message.



This task may take several minutes (depending how many patients you have) but will take less time if you are the only one logged into OPAS.


Note: If you have a new Referrer to add, but he is replacing an existing Referrer who has left, you may wish to update the Referrer record for the Referrer who has left with the name of the new Referrer. This would enable you to update all the patients who had the old Referrers name on their record with the new Referrers name, providing you have answered **Yes** to the above prompt.

36. Choices – Referrer Types

Menu: Utilities – Choices – Referrer Types

When referrers are set up, you have the option to state what type of referrer they are. We have set the following up for you.

C	Consultant
GP	General Practitioner
PD	Podiatrist
PY	Physiotherapist
OT	Occupational Therapist

If you want to add further referrer types click on the 'enter' icon  (or Edit, Enter)

Code enter an appropriate code


Description enter a description for the referral type


37. Choices – Suppliers


Menu: **Utilities – Choices – Suppliers**


This is a full list of suppliers and comprises both the OPRICE list and additional NSI suppliers. This is for reference purposes only. New suppliers should be added in **Utilities –NSI – Suppliers**.

If you would like to see all the prices for a particular supplier:

find the relevant supplier and then click on the ‘prices/suppliers’ icon  (or Prices) to see details of the prices and items for that supplier.


To see the information as a list on the screen click on the ‘browse’ icon  (or Data, Browse).

To print the information click on the ‘print’ icon  (or File, Print) and select **Custom Report**. At the top of the screen select This_view. Highlight PLIST and click on Run. A print box will appear which defaults to 1 copy to the printer. If you require more than one copy simply change the number in the copies box. Click on OK to continue of Cancel to abort the print.

To return to the item screen click on the ‘exit’ icon  (or File, Return).

38. Choices – System

Menu: **Utilities – Choices - System**

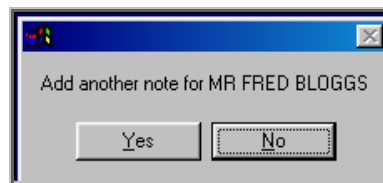
This screen holds system variables, which should not need changing once they have been set up. This screen is very long and you may need to click on the ‘page down’ icon  (or **PgDn**) to see all the options.

<i>VAT Rate</i>	will need to be changed if the VAT rate changes: it should not be changed in advance, only on the day that the rate actually changes
-----------------	--

<i>Hospital Name</i>	would only be changed if the name of the Trust changed
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<i>Stock Supplier (1)</i>	the supplier number for stock supplier 1 is 888
<i>Stock Supplier (2)</i>	the supplier number for the second stock location (usually 777)
<i>Stock Supplier (3)</i>	the supplier number for the third stock location (usually 666)
<i>Stock Supplier (4)</i>	the supplier number for the fourth stock location (usually 555)
<i>Stock Supplier (5)</i>	the supplier number for the fifth stock location (usually 444)
<i>Last Home Purchaser</i>	purchasers should be entered into the system with internal purchasers first (often the only purchaser will be the Trust itself, which will be an internal purchaser). If there is more than one internal purchaser, this number is the number of the last internal purchaser: e.g. if there are 3 internal purchasers (entered first into the purchasers list) followed by 5 external purchasers (entered after the internal ones), then 3 would be entered here. Alternatively, when the purchasers are created, indicate on each one whether it is an internal or external purchaser.
<i>Use Large Icons</i>	is set to Yes to show large icons. If you prefer small icons, change this to No
<i>Instant Invoice</i>	if this is set to anything other than 0, an invoice will print immediately after having been entered onto the system if the purchaser on the invoice is external. Enter the number of invoices that you wish to be printed instantly.
<i>GRN</i>	if this is set to anything other than 0, a goods return notification will print when goods are marked as returned on the orders. Enter the number of GRN's that you wish to be printed instantly.
<i>Orders</i>	if this is set to anything other than 0, the order will print instantly when it is raised. Enter the number of orders that you wish to be printed instantly. (If you have certain purchasers that do not require printed orders, their instant print can be switched off in the purchaser screen - see Utilities - Note 33. Choices - Purchasers).
<i>E-mail orders</i>	if you wish to e-mail orders enter c:\daemon\ in this field
<i>General Printer</i>	is the printer used for letters and reports. To change this, set the required printer as the default in Windows, then in this screen move the cursor down to this line and press Tab

<i>Order Printer</i>	is the printer used for orders. To change this, set the required printer as the default in Windows, then in this screen move the cursor down to this line and press Tab . If the same printer will be used to print orders as the General printer, leave this line blank (press F8 to blank the line if required)
<i>FAX Printer</i>	is the device used to automatically fax orders. To change this, set the required device as the default in Windows, then in this screen move the cursor down to this line and press Tab . If faxed orders are not required, leave this line blank (press F8 to blank the line if required)
<i>Use Prescriptions</i>	set to either Always or Never as required. If set to Always , for each order you enter you <u>must</u> select the relevant prescription
<i>Prosthetics</i>	if you are using OPAS for prosthetic patients enter Yes here to switch on the ability to add prosthetic referrals and quotations from the patient screen
<i>'Windows' messages</i>	normally set to Yes to show messages in the normal Windows style
<i>Default</i>	this allows you to set what option appears as the default for Yes-No and OK-Cancel prompts.



If you set this to **No** (this is the normal setting), Yes-No prompts default to **No** and OK-Cancel prompts default to **Cancel**. If you set this to **Yes**, Yes-No prompts default to **Yes** and OK-Cancel prompts default to **OK**.

<i>Dormant time</i>	is the number of years without an order being placed after which a patient is declared as dormant and is moved to the dormant patients file using the dormant patients routine. Change this to the number of years that you wish to keep patients on the live system without an order being placed for that patient.
<i>PAS link path</i>	enter the path to the PAS link, if installed
<i>Upgrade path</i>	the path to the files provided by Wynnlogde Ltd for upgrades to the OPAS System. This is normally left blank to indicate A: (the floppy drive).

<i>Export path</i>	this is used by those exporting information from OPAS into the main hospital system
<i>Include fieldnames</i>	this is used by those exporting information from OPAS into the main hospital system
<i>Update after Pass</i>	if this is set to No , you will not be able to edit orders or invoices once the invoice has been passed to finance for payment.
<i>Process invoices for received/supplied goods only</i>	if this is set to Yes , the invoice can not be amended for adding invoice details unless the goods have been either received or supplied
<i>Auto-update DOR</i>	if this is set to Yes , whenever a patient is added or amended with a valid postcode in their address the <i>DOR</i> field on the patient record will be automatically populated.
<i>Manufacture</i>	to be set as None , Local or Remote . This field is used to indicate if orthotic items are manufactured by the Hospital. If they are not this should be set to None . If they are, you should set this to Local if the manufacturing takes place on site, or Remote if at another location.
<i>Record delivery notes</i>	if this is set to Yes , when goods are booked in on the order, you will be prompted to enter the delivery note number
<i>'Launch' with: Still</i>	type in the path of the executable file of the software on your PC that is used to display pictures/photographs. If you do not know this, your IT department should be able to help you.
<i>'Launch' with: Video</i>	type in the path of the executable file of the software on your PC that is used to display video pictures. If you do not know this, your IT department should be able to help you.
<i>Appointment time</i>	is the default length of time in minutes for an appointment: it should show the most common length of appointments.
<i>No of Transport Memos</i>	enter the number of copies of transport memos required
<i>Earliest/latest times with transport</i>	enter the earliest and latest times for the morning and the afternoon that appointments that require transport can be offered.
<i>Cancelled Appoints</i>	once appointments are cancelled, this option decides whether they are kept on the system and identified by being highlighted in red, or removed
<i>Clinic Usage</i>	you can set how full a clinic can be booked with automatic appointments by reducing the percentage figure. However,

making use of the facility by setting the usage to less than 99% will slow down the speed taken for OPAS to find the next available appointment for you.

Maximum DNAs this controls the generating of automatic letters for patients who DNA e.g. 1 in 6 months would result in a letter being sent if the same patient DNA'd twice in a 6 month period.

Appointment Outcome: DNA enter the reference for your DNA outcome. This is so OPAS will ask if you wish to make a new appointment when you record that a person Did Not Attend their appointment.

Appointment Outcome: CNA enter the reference for your CNA outcome. This is so OPAS will ask if you wish to make a new appointment when you record that a person Could Not Attend their appointment.

Appointment Outcome: CBH enter the reference for your CBH outcome. This is so that when an appointment is cancelled by the hospital the correct outcome is inserted

Max Appointments enter the maximum number of appointments per session for New, Supply, Fit and Review appointments. Leave these blank for unlimited number of appointments.

Monitor messages if this is set to Yes, you will be prompted when you have new messages ([see Utilities - Note 46. Messages](#))

Pass for payment this controls the number of copies of the report that is produced when Pass for payment is run from the invoice screen. Enter 0 here to stop the report from printing.

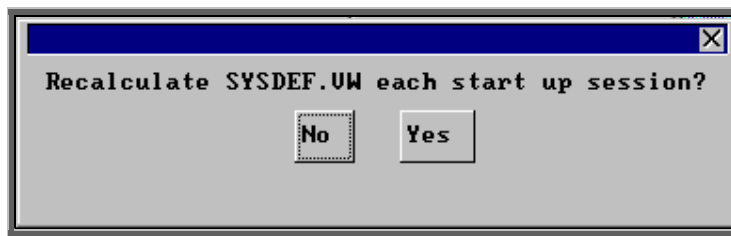
Sage version if you are exporting invoice details to Sage software, enter the version of Sage used

Purchaser Code (HA) select your Health Authority. Press **Tab** to choose from the pop-up list

Centre Code (DSC) select your Disablement Service Centre. Press **Tab** to choose from the pop-up list

Having made any changes, either press **Ctrl-Enter** to save the changes, or **Esc** then **N** to abandon the changes.

You are then asked:



and you **must** press **Enter**.

39. Choices – Technicians

Menu: **Utilities – Choices – Technicians**

This option is for hospitals that have on site workshops, where appliances are made or altered.



To add a technician click on the 'enter' icon (or Edit, Enter).

Reference is entered automatically by the system and cannot be changed

Technician: enter the technicians name

Department: select the department the technician works in from the pop-up list (Departments to appear in this pop-up are created in **Utilities – Choices – Manufacture**)

40. Choices – Titles

Menu: **Utilities – Choices - Titles**

We have entered some standard titles applied to patients but you can enter more if you need to. Adding titles here will enable them to be selected from a pop-up list on the **Patient** screen, rather than being typed, thus ensuring no spelling mistakes.

Each title can have a sex allocated against it. e.g. Mr has M (for male) and Mrs has F (for female). This means that when you add a patient with the title Mr the Sex field on the patient record is automatically populated with M.

There are certain titles with can be either sex e.g. Doctor and the sex field has been left blank so that this can be entered manually when you enter the patient.


41. Choices – Transport

Menu: Utilities - Choices - Transport

These appear in a pop-up menu in the **Patients** screen. By recording in the patient record screen the type of transport required (if any) means that when an appointment is made for that patient it will remind you that transport needs to be booked and an internal transport memo will be printed along with the letter to send to the patient.

We have added two transport types for you

1. No transport required
2. Ambulance

If you require more, click on the 'enter' icon  (or Edit, Enter).


42. Choices – Wait Types

Menu: Utilities - Choices - Wait Types

When you add a patient to the waiting list you are asked to assign a **Wait Type** (i.e. a priority). We have set up three for you, but these can be amended or additional **Wait Types** added.

The three already set up are:

Urgent	with a priority weighting of 5
Soon	with a priority weighting of 3
Routine	with a priority weighting of 1

To add a new **Wait Type**, click on the 'enter' icon  (or Edit, Enter).


Type enter the wait type description

Weighting enter the priority weighting. Each person on the waiting list is given a score, which is calculated by multiplying the number of days they have been on the waiting list by the weighting of the **Wait Type** that they were given when added to the waiting list. Therefore, the higher the weighting, the faster their score will increase.

43. Choices – Wards

Menu: Utilities - Choices - Wards

These appear in a pop-up menu on the **Order** screen, so that if the patient is an in-patient the ward they are in can be entered.

To add a new **Ward**, click on the 'enter' icon  (or Edit, Enter), and type in the Ward name.

44. Ex-patients

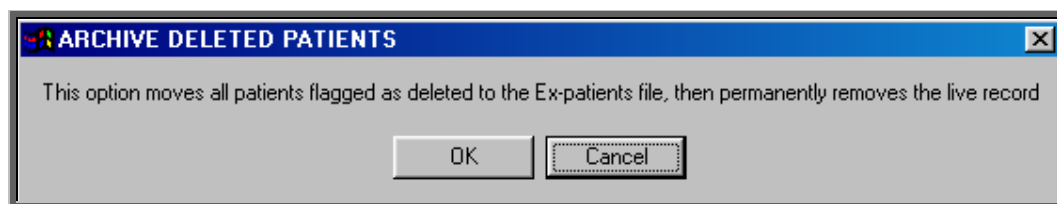
Menu: Utilities - Ex-patients

Over time the patient database will grow considerably in size. If you have patient records that are no longer required, they could be moved into **Ex-patients**. Their details can still be seen in **Ex-patients** along with their orders, notes and appointments, but they will no longer be in your active patient database (i.e. **Patients** option off the main menu).

Archiving patients

Menu: Utilities - Ex-patients – Archive

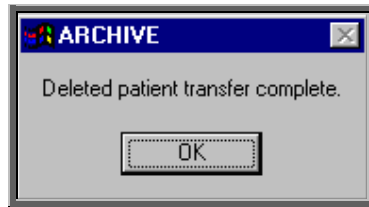
Selecting this option will move all you're active patients that have been deleted into the Ex-patients database. You may wish to run **Dormant Patients** prior to this, so all those patients that have not had an order for several years, are transferred too ([see Patients - Note 30. Dormant patients](#))



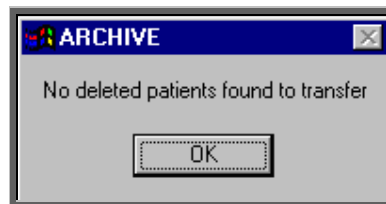
Note: Depending on the size of your patient database and the speed of your network, this may take quite a considerable time to run. You may wish to set this running overnight, but if you do, please ensure that the PC doing the archive will not get switched off accidentally. It is strongly advised that you take a back

up before running this option and you **MUST** be the only person logged on to OPAS.

Do not interrupt while the archive is running. You will know when it has finished as the following message will appear.



If there are no deleted patient records to be moved into **Ex-patients** you will get the following message instead.





Looking at archived patients


Menu: **Utilities – Ex-patients – Ex-patients**

Selecting this option will show you those patients that have been archived.

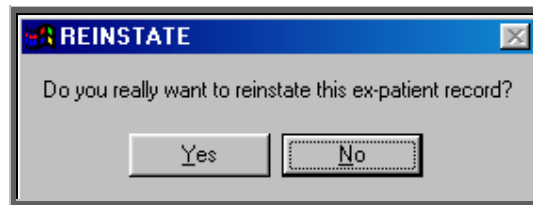
There is not as much information shown on the initial **Ex-patients** screen as there is on the active **Patient** screen, but you can still access all that patients orders, notes and appointments.

To look at their orders, click on the 'orders' icon  (or History).

To look at their notes, click on the 'notes' icon  (or Notes).

To look at their appointments, click on the 'appointments' icon  (or Appointments).

A patient can be moved back to the active **Patient** file by selecting **Reinstate** from the top of the **Ex-patient** screen



Click on **Yes** to continue, or **No** to abandon the transfer back to the active patient database.

Looking at archived addresses

Menu: **Utilities – Ex-patients – Addresses**

When the address of a patient is changed, you are given the option to save the details of the previous address. This information is held against that patients record ([see Patients - Note 4. Amending a patient's record](#)), but is also held here. As all the old addresses are held together here, you have the ability to search for an old address by postcode.

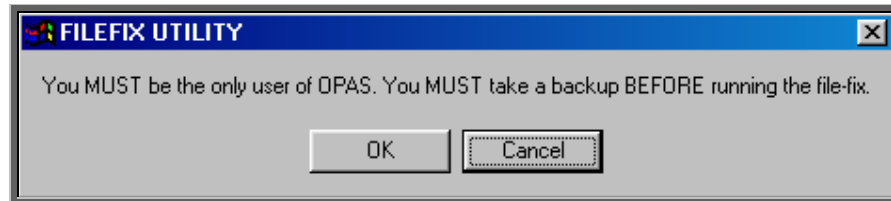
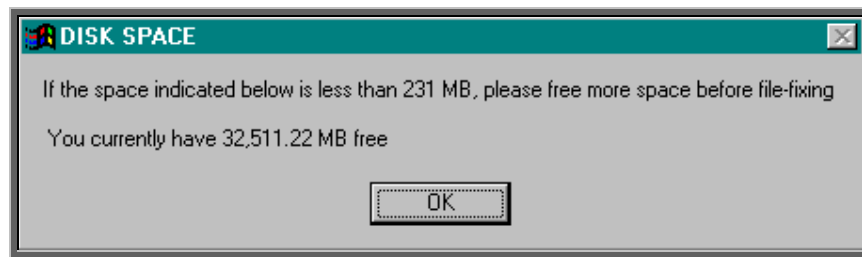
45. File Fix

There are occasions (particularly following a power failure) that we will ask you to run a **File Fix**. This will check the main database files to ensure that there are not any problems and if there are it will attempt to fix the relevant files. This option will take approximately 30 minutes to run. If you have a particularly slow network, it could take even longer.

Everybody that is using OPAS (except the user who is going to do the **File Fix**) must log out and not log back on before the **File Fix** has finished. It is strongly advised that you take a back up before running the **File Fix**, especially if it is a while since a backup was taken. (You should be taken backups daily! – [see Introduction - Note 5. Backups](#))

Menu: **Utilities – File Fix**

OPAS will check that you have enough space on your local drive to perform the File Fix. The following message will appear, and you must ensure that there is enough space before continuing with the File Fix



If you are not the only person logged onto OPAS or backup has not been taken recently select **Cancel**. Otherwise select **OK** to continue.

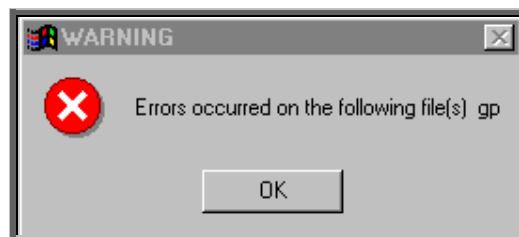
In the bottom left corner of the screen it will indicate which file it is checking.

If the information stops changing, do not worry that the **File Fix** is not working, it will just be checking one of the larger files. You will know when the **File Fix** has finished as the following message will appear in the middle of the screen.



If the above message appears, you can continue to use OPAS.

If any other message than the one above appears, e.g.



write down exactly what it says and contact the Support Helpdesk on 01904 492425. **DO NOT** use OPAS or let anyone else log on without speaking to someone on the Helpdesk.

46. Messages

There is an internal messaging system within OPAS, so that messages can be sent to each other regarding patients and their orders and appointments. This is particularly useful for those using OPAS across more than one site, but it also useful for leaving messages for people that you do not see due to holidays or working hours.

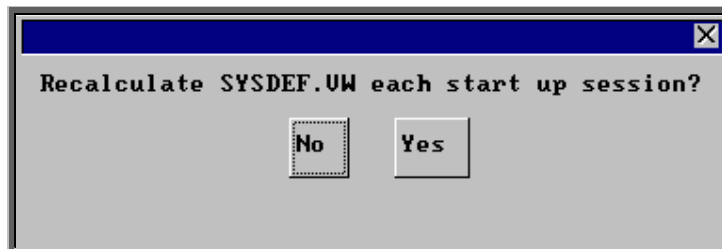
a) Switching messaging on

Menu: Utilities – Choices System

Within messaging, you have an inbox and an outbox. These are effective immediately with no set up required. However, if you want OPAS to prompt you when a message is received, then the monitoring of messages needs to be switched on. To do this, go into **Utilities – Choices – System** and press the **Page-Down** key. *Monitor messages* should be set to Yes.

Monitor messages	Yes
Pass for payment	1
Sage version	line50

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



OPAS will check for new messages each time you return to a menu screen. When you have new messages the following prompt will appear.




You can choose to read the message straight away by clicking on **Yes** (or type **Y**).

If you click on **No** (or type **N**) you can go to your in-box at any time by selecting **Utilities – Choices – Messages – Inbox**.

b) Sending messages from the outbox

Menu: **Utilities – Messages – Outbox**.

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

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: press the **Tab** key to access the pop-up list of patients. By inserting the patient's details here will enable the person reading your message to jump to the patient record.

Order: press the **Tab** key to access the pop-up list of orders. By inserting the patient's details here will enable the person reading your message to jump to the order.

Appointment: press the **Tab** key to access the pop-up list of appointments

Care Episode: press the **Tab** key to access the pop-up list of care episodes


Note: OPAS does not validate that the order, appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

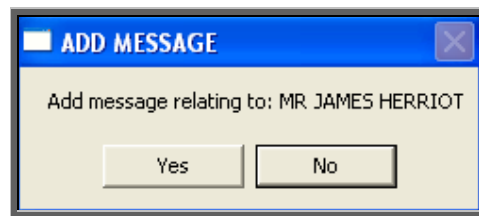
Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

c) Sending messages from the Patients screen

Menu: **Patients**

Click on the 'messages' icon  (or Message).



Click on **Yes** (or type **Y**) to continue.

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: press the **Tab** key to access the pop-up list of orders. By inserting the patient's details here will enable the person reading your message to jump to the order.

Appointment: press the **Tab** key to access the pop-up list of appointments

Care Episode: press the **Tab** key to access the pop-up list of care episodes


Note: OPAS does not validate that the order, appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

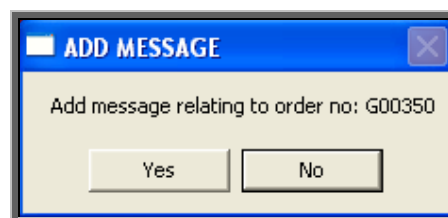
Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

d) Sending messages from the Order screen

Menu: **History – Orders**

Click on the 'messages' icon  (or **M**essage).



Click on **Yes** (or type **Y**) to continue.

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: order details will have been entered for you

Appointment: press the **Tab** key to access the pop-up list of appointments

Care Episode: press the **Tab** key to access the pop-up list of care episodes





Note: OPAS does not validate that the appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

e) Reading messages

Menu: **Utilities – Messages –Inbox.**


- If patient details have been completed, you can jump to the patient's record by clicking on the 'patient' icon  (or Goto, Patient).
- If order details have been completed, you can jump to the order by clicking on the 'order' icon  (or Goto, Orders).
- If you wish to reply to the message, click on the 'enter' icon  (or Reply).
- If you wish to remove the message from your inbox, click on the 'delete' icon  (or Clear). This will also delete the message from the senders outbox.

47. NSI (Non Scheduled Items)

It is within the NSI option that additional items, suppliers and prices that are not part of OPrice (contract pricing agreed by PASA/Scottish Healthcare) can be created.

Menu: **Utilities – NSI – Items**

By adding here additional items which you purchase, will save you time when adding orders, as they will then appear in the pop up list available in the *Code* field of the order, and once selected the description of the item will automatically be inserted in the *Description* field in the *Detail* box.

To add a new item, click on the 'enter' icon  (or Edit, Enter).



At the bottom left corner of the screen you will be asked for the new item code.


Enter your code here and press **Enter**. If the code is already in use you will be told.



If the code is unique, you will be asked to confirm that you wish to continue.




Click on **No** to abandon this option. Otherwise click on **Yes** and enter a *Description* and the standard *VAT Rate* for the item.

At any time, you may come back and edit the *Description* and *VAT Rate* of the item, (but not the *Code*) by clicking on the 'update' icon  (or Edit, Update).

Menu: Utilities – NSI – Suppliers

Any suppliers that you use which are not identified in OPrice, need to be added here so that they will appear in the pop up menu on the *Supplier* field in the **Orders** screen.

To add a new supplier, click on the 'enter' icon  (or Edit, Enter).



At the bottom left corner of the screen you will be asked for the new supplier code.

Enter your code here and press **Enter**. If the code is already in use you will be told.



If the code is unique, you will be asked to confirm that you wish to continue.




Click on **No** to abandon this option. Otherwise click on **Yes** and complete the following fields.

Name enter the full company name of the supplier

<i>Shortname</i>	enter an abbreviated name for the supplier (you will be able to search for suppliers in the pop up list by this Shortname)
<i>Add1 – Add4</i>	there are 4 lines available for entering the supplier address
<i>Postcode</i>	enter the supplier's postcode
<i>Phone</i>	enter the supplier's phone number
<i>Fax</i>	enter the supplier's facsimile number
<i>Contact</i>	if you have a contact name for the supplier, this can be entered here
<i>Vendor No.</i>	if you know your account number with the supplier, it can be entered here


All the fields are optional, but if you want the suppliers address to appear correctly on your orders, you need to ensure that at least those fields in red are completed.

At any time, you may come back and edit all the fields (except *Code*) by clicking on the 'update' icon  (or Edit, Update).

Menu: Utilities – NSI – Prices

By adding additional prices that are not included in OPrice, will save you time when adding orders, as the Price will automatically be inserted in the *Price* field in the **Detail** box.

Before adding a price, the item and the supplier need to be known to the system. If either/both are not set up on OPAS already, then follow the steps above on how to add a new item and supplier.

To add a new price, click on the 'enter' icon  (or Edit, Enter).

Supplier select the supplier from the pop up list

Item select the item from the pop up list.

If you select an item that there is already a price for from the supplier selected, you will get the following message at the bottom of the screen.



If the supplier and item selected is correct then you will need to abandon the adding of a new price by pressing **Esc** a price already exists.

Price enter the price for the selected item from the supplier selected

Search the *Search* field will automatically be populated

VAT Rate enter the default VAT rate for the item

S standard
E exempt
Z zero-rated
R reclaim

At any time, you may come back and edit all the fields (except *Search*) by clicking on

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

48. OPrice

OPrice contains the pricing information that has been contracted by Purchasing and Supplies Agency (PASA). This is updated on an annual basis. When new prices are agreed with PASA they kindly pass the details on to us so that we can convert them into a format that can be read into OPAS so that you have access to them when raising orders. As this is their data, you do not have the ability to edit this information. Having said that, there is the option to edit a suppliers details as they could move address within the contract year. If you need to add additional items, prices or suppliers, this should be done in the NSI (Non Scheduled Item) area ([see Utilities - Note 46. NSI](#)).


Menu: Utilities – OPrice – Current

Items Shows all the items and their descriptions for the current contract year as defined by PASA/Scottish Healthcare. This is for information only, and cannot be amended.

Prices Shows all the prices agreed for the current contract year by PASA/Scottish Healthcare. This is for information only, and cannot be amended.

Suppliers Shows all the suppliers for the current contract year as defined by PASA/Scottish Healthcare. As supplier details may change within

the year of the contract, you do have the ability to amend the details

by clicking on the 'update' icon  (or Edit, Update).

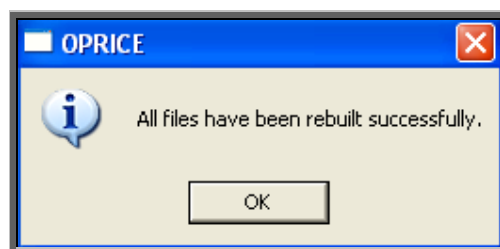
Menu: **Utilities – OPrice – Previous**

Items	Shows all the items and their descriptions for the previous contract year as defined by PASA/Scottish Healthcare. This is for information only, and cannot be amended.
Prices	Shows all the prices agreed for the previous contract year by PASA/Scottish Healthcare. This is for information only, and cannot be amended.
Suppliers	Shows all the suppliers for the previous contract year as defined by PASA/Scottish Healthcare.

Menu: **Utilities – OPrice – Rebuild**

This option will rebuild your live prices file with the combined information held in OPrice, NSI and Stock Control. This option needs to be run whenever prices are being updated by a upgrade disk sent to you by Wynnldodge Limited e.g. the new PASA price disk sent in March/April. Full instructions will be sent with any upgrade disk, but it advisable to take a back up before running this option.

You will be informed when the rebuild is complete. Depending on the speed of your PCs/network this can take up to half an hour.



49. Order numbers

Menu: Utilities - Order Numbers - Standard Formula

N.B. This menu option is only available to those logins that have administrator rights.

This is where the format for the automatic order numbering is set. The formula is explained below:

```
Text-File
group("G EXT PCG",$search)!right(str([count]+100000),5)
tmp

This text-file contains the standard formula that is used to calculate new
order numbers. Extreme care should be taken when editing this formula.

Example:

"G"!right(str([count]+100000),5)

would result in a series of order numbers:

G00001
G00002
G00003
etc

Call the support desk if in any doubt.

The second line of this file is used for the temporary patient number prefix
```

Where a hospital number is not known, a patient can be allocated a temporary number by typing **[?]** at the patient entry screen. A sequential number is allocated by the system, prefixed by the text shown on the second line of the file above e.g. tmp.

Do not make any changes unless you are confident about what you are doing!

Menu: Utilities - Order Numbers - Portable Formula

N.B. This menu option is only available to those logging onto a portable licence.

This is where the format for the automatic order numbering is set. So that order numbers are not duplicated, the portable system needs to allocate order numbers with a different prefix to the main system. Therefore each portable licence needs to have its own unique numbering system and a different formula created on each laptop. The formula is explained below:

```

= Text-File =
"P"iright(str([count]+100000),5)
TEMP

This text-file contains the standard formula that is used to calculate new
order numbers. Extreme care should be taken when editing this formula.

Example:

"G"iright(str([count]+100000),5)


would result in a series of order numbers:

G000001
G000002
G000003
etc

Call the support desk if in any doubt.

The second line of this file is used for the temporary patient number prefix

```

Where a hospital number is not known, a patient can be allocated a temporary number by typing  at the patient entry screen. A sequential number is allocated by the system, prefixed by the text shown on the second line of the file above e.g. TEMP.


Do not make any changes unless you are confident about what you are doing!

50. PAS Link

Menu: Utilities – PAS Link

If the hospital has bought some additional software from Wynnldodge Limited called PAS Link, this option can be used for downloading patient information from the main hospital database. As hospital databases vary, the instructions for using PAS Link are site specific and individual instructions will be provided to those hospitals using this.

If you have PAS Link, the option can be run from here, or by clicking on the 'PAS Link'

icon  (or Paslink) in the Patient screen.

51. Password

Menu: Utilities – Password

Use this screen to change your password.

On selecting this option, you will first be asked to type in your current password.



You will then be asked to type in your new password.



You will then be asked to type in your new password again to check that you typed it correctly the first time.

If you type the new password the second time exactly the same as the first time, your password will be changed.



If, however, you type the new password differently the second time you will get the following error message.



Click on OK to remove the message and then press the up arrow key on your keyboard to place your cursor back in the box where you need to type in the new password again. You are given three attempts to re-type the new password before being taken back to the menu, where you can start again from scratch.

52. Portable

If you have an OPAS portable licence for use at remote clinics, these options are used for transferring data between the main system and the laptop computer.

When you are working on an OPAS portable licence, the work that is carried out is stored in the appropriate section here so that when the laptop is next connected to the main system it knows what information needs to be transferred. Once the information is transferred onto the main system, these temporary files are cleared down, ready for the next time the portable is used.

Menu: **Utilities – Portable – Exchange – Upload**

This option will transfer the information from the main system onto the laptop, so that the latest information is available when working at a remote site.

Menu: **Utilities – Portable – Exchange – Download**

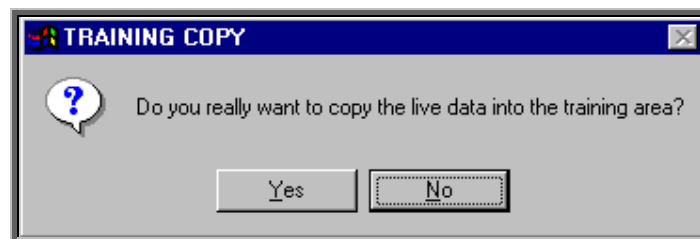
This option will transfer the work done on the laptop (held in the temporary files) onto the main system.

53. Training

Menu: **Utilities – Training – Copy**

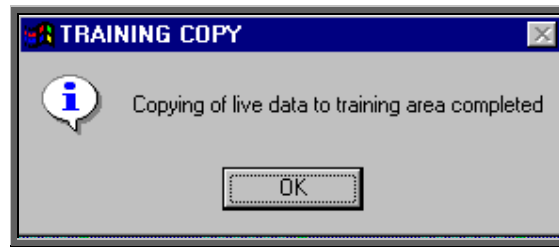
This option will transfer the data held in your live system into the training database. This makes the training area look more ‘life like’ and provides plenty of data to practice with.

On selecting this option you will be asked to confirm whether you wish to continue.



Click in **Yes** to continue, or **No** to abandon the option.

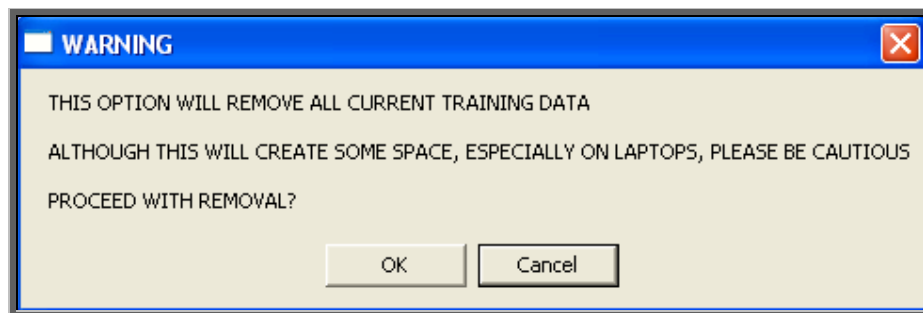
It will take a few minutes to copy the data, and you will know when it has finished as the following message will appear.



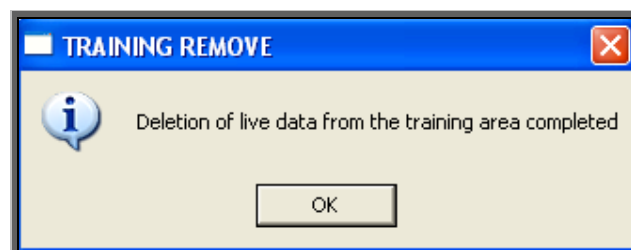
To log onto the training database, click on the OPAS icon as usual, but instead of logging on as yourself, log on with the User ID of Trainee. You will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.

Menu: Utilities – Training – Remove

Selecting this option will remove the training database. You may want to do this if you no longer use the training database and want to free some space on your computer



If you are in any doubt, please contact the OPAS Helpdesk before proceeding.



You will be notified once the training database has been deleted.

Note: If the Training database is removed and is then required again (e.g. for a new member of staff), select **Utilities – Training – Copy** to reinstate it.

54. Upgrade

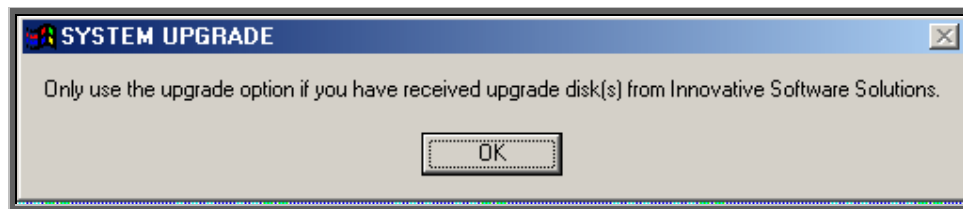
Menu: Utilities – Upgrade

This option should only be used if you have received an upgrade disk from Wynnlogde Limited. **DO NOT** use this option with disks received from anybody else.

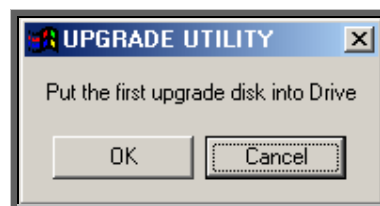
We periodically send you upgrade disks to update

- prices
- report layouts
- letter layouts

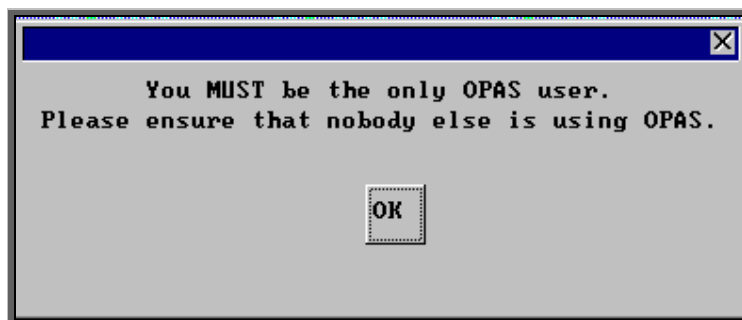
When you receive an upgrade disk to update reports or letters, make sure you are the only person logged onto OPAS before selecting this option (if you are not sure, click on **Utilities – Who** to find out who is logged on).



Click on OK



Put the disk into you PC, and click on OK



Make sure you are still the only person using OPAS and click on OK

A black MS-DOS prompt box will appear briefly on the screen. When this black box has disappeared the transfer is complete.

The disk can now be taken out of the PC. The disk is no longer required, but should be kept until confirmation that the changes required have been made.

55. Users

Everybody that needs to access OPAS should be set up as a user. As OPAS maintains an audit trail showing which user has done what, it is prudent to make sure that each person has his or her own log on, and is not logging on as somebody else. If you are in any doubt as to who the OPAS session is logged in as, look at the very top of the screen where an information banner is displayed.

A screenshot of a blue rectangular banner with a black border. The text inside the banner is white and reads: "Orthotic Patient Administration System - Logged in as LINDA at 21:55 on 02/11/2003".

Orthotic Patient Administration System - Logged in as LINDA at 21:55 on 02/11/2003

When OPAS is first installed, we will set up those users who will initially need to use OPAS. However, as new members of staff are taken on, they will be required to be set up here.

Menu: Utilities – Users

To add a new user, click on Edit and then select Enter.

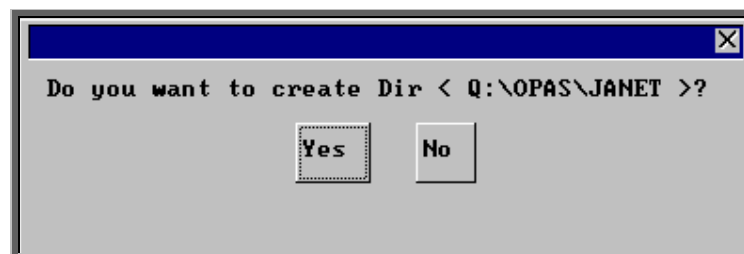
User ID enter the forename of the user e.g. Janet. There must be no spaces in the user name and it must be unique. Therefore if you have two Janets using OPAS one will have to be set up as their forename and initial of their surname e.g. Janetp or perhaps an abbreviation of their name e.g. Jan

Password enter the forename of the user in CAPITAL letters e.g. JANET. There must be no spaces in the password.

User Name enter the full name of the user e.g. Janet Air.

Default appointment letter enter the standard appointment letter used – this is usually A.

<i>Print</i>	this field is used when OPAS is being used in more than one location. You can enter the appointment/collection letters used by that user so that when they use the Auto-print function for printing appointment/collection letters only their letter types will be printed.
<i>Assigned User Mode</i>	<p>enter USER if the new user is to only have access to the screens used for day-to-day clerical procedures.</p> <p>enter ADMIN if the new user is to have access to all areas of OPAS, including those screens controlling the system set-up and maintenance functions.</p>
<i>Information Set</i>	press the Tab key and select standard from the pop up list.
<i>Language</i>	leave this field blank
<i>Autohelp</i>	select Yes
<i>Application Help</i>	select Read_only
<i>Technical Reference</i>	select Read_only
<i>Procedures</i>	select Read_only
<i>Definitions</i>	<p>select Read_only if they have been set up as USER above.</p> <p>select Author if they have been set up as ADMIN above.</p>
<i>Administrator</i>	select No
<i>Language Maintenance</i>	select No
<i>Personal Directory</i>	when reports are run in OPAS and the results are saved to file, they will be automatically saved in the default directory entered here. Therefore this line should read Q:\OPAS\ (user name) e.g. Q:\OPAS\JANET. Press Enter .




You will be asked if you want to create the new directory and you should click on **Yes** (or type Y).


Any of the fields can be changed later by clicking on Edit and selecting Update.

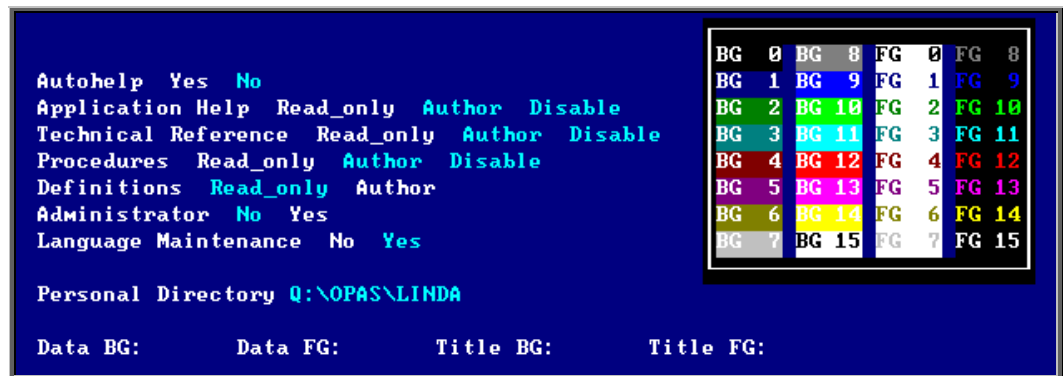
Once a user id has been created, they have the ability to choose the colour of their screen. The colour scheme chosen, however, will take effect on all key screens i.e. patient, order, invoice, stock, appointment screens. The colour scheme selected will only affect the user it is applied to, so in theory you can all have different colours.

Note: If you do change your screen, please remember that when ringing the support desk it is no help to tell us the colour of the screen you are in as this will no longer be relevant!

To change screen colours firstly find the user that wishes to change their screen colours, by

moving through the records with the 'right arrow' icon  (or **F6** key). Click on the

'update' icon  (or Edit, Update) and move down to the *Data BG:* field at the bottom of the screen.



Using the colour chart on the screen you need to select the background (BG) and foreground (FG) colour of the data and titles. For example, if you want the background of the data to be dark blue enter '1' in the *Data BG:* field, if you want it to be bright pink (for any wannabe Barbies out there) enter '13'. Below are some examples which may explain this better.

Example 1



will give you



Example 2

Data BG: 1	Data FG: 15	Title BG: 3	Title FG: 15
------------	-------------	-------------	--------------

will give you

Hospital No	TORUS004
Title	Forenames
MISS	TESSA
Address	213 Prospect Avenue
	Main Road
Town	Preston

Example 3

Data BG: 1	Data FG: 15	Title BG: 3	Title FG: 0
------------	-------------	-------------	-------------

will give you

Hospital No	TORUS004
Title	Forenames
MISS	TESSA
Address	213 Prospect Avenue
	Main Road
Town	Preston

At any time you can revert back to OPAS standard colours by leaving the four colour fields blank.

Data BG:	Data FG:	Title BG:	Title FG:
----------	----------	-----------	-----------

56. Version

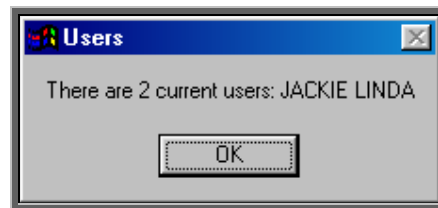
Menu: Utilities – Version

- | | |
|-----------------------|---|
| Filecheck | will check your OPAS files. This option should only be run if asked to by a member of the OPAS Helpdesk |
| Version Number | will show you which version of OPAS you are using and when it was installed. It will also give a brief summary of the changes made in that version. |

57. Who

Menu: Utilities - Who

On selecting this option you will be shown who is currently logged on to OPAS.



This option is useful when you need to be the only person logged in to perform a task e.g. archiving appointments and you want to know who is currently using OPAS.

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