OPAS7

Orthotic Patient Administration System

Manual

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OPAS

Orthotic Patient Administration System

Introduction

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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, 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

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

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

- **Stock Control**

  Setting up stock items
  Ordering stock
  Maintaining stock levels

- **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 Wynnlodge to discuss further training requirements. We recommend training to be taken in half-day sessions.

4. OPAS Helpdesk 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 procedure
- 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 OPAS helpdesk.

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

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

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

7. Copyright

Moving around OPAS

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 37. 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.

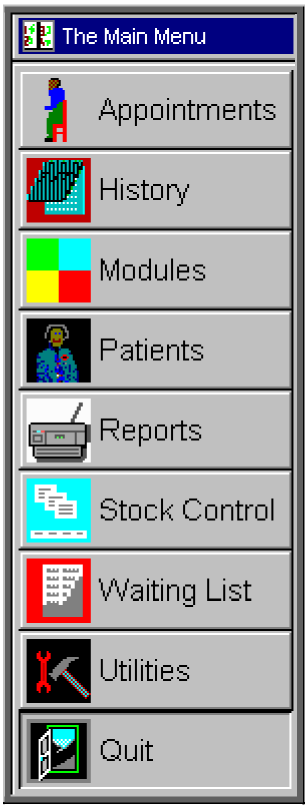
Training Area

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

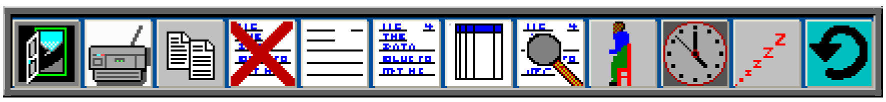
if another menu item begins with the same letter, the selection box moves to the first item beginning with that letter: pressing the letter again moves the selection box to the next menu item beginning with that letter; when the right item is selected, press **Enter**.

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 onto the 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

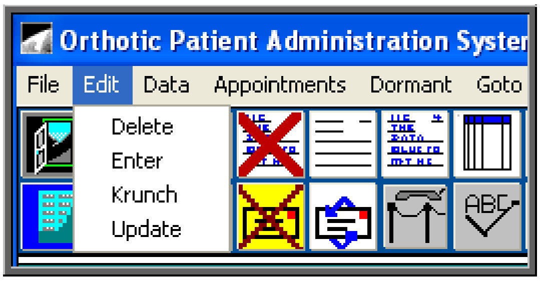
if you do not want to select any of the icons, move the cursor away from the icon area and then let go of the mouse button.

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 above the icons.

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 Update).

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 6. 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

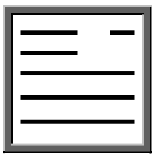
the key press (if any)

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.

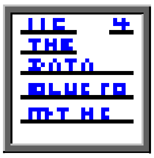
Enter



Edit, Enter

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

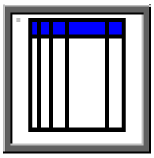
Update



Edit, Update

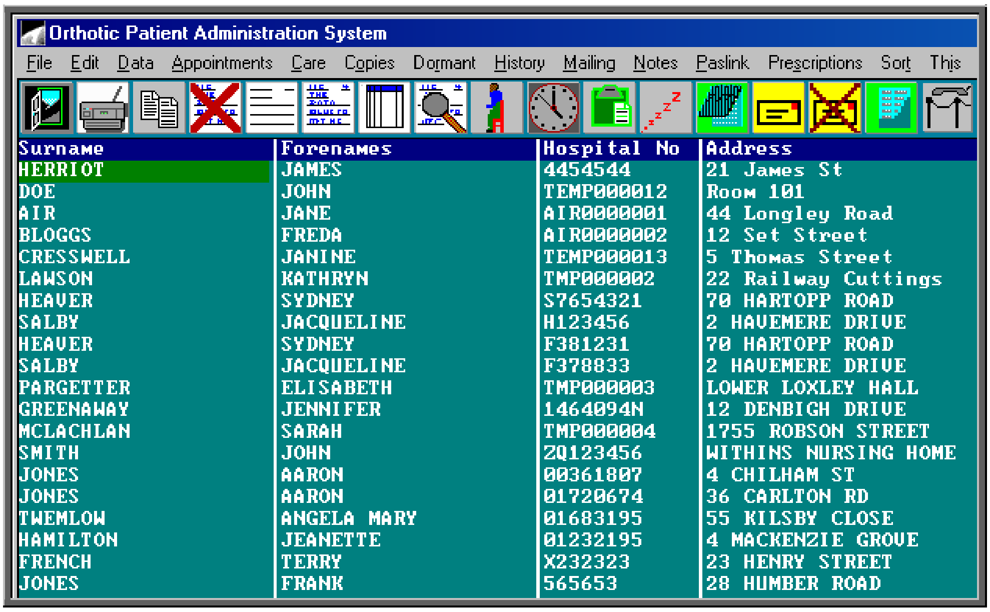
This allows you to change the data on the current record.

Browse



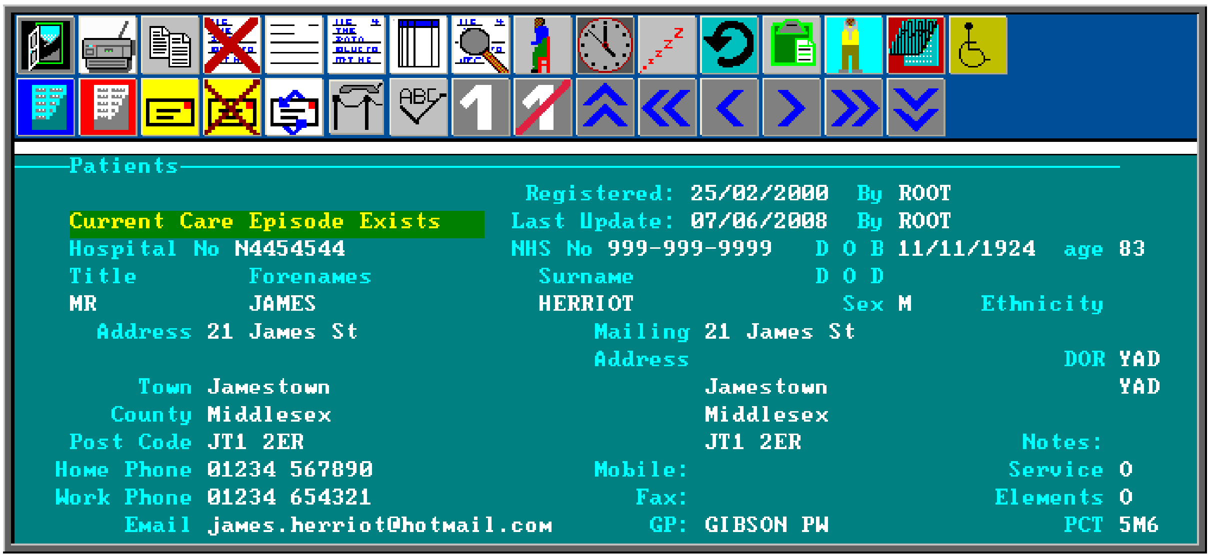
Data, Browse

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

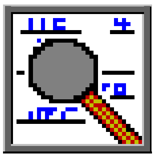


When you change into browse (list) mode, the record which you are currently looking at will show at the top of the page. To see previous records, use the up arrow or **PgUp**.

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



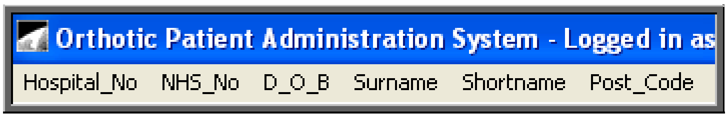
Find



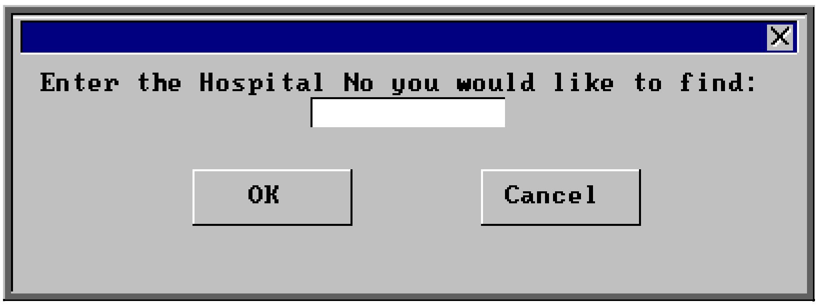
Data, Find

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).



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.



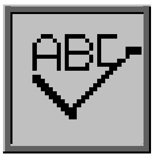
Then type the data you want to find and select OK by clicking on the OK button with the mouse or by pressing **Enter** twice.

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).

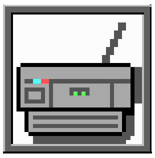
Press **Esc** to remove the Query Summary box. Any reports or letters produced now will only include those in the index created.

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



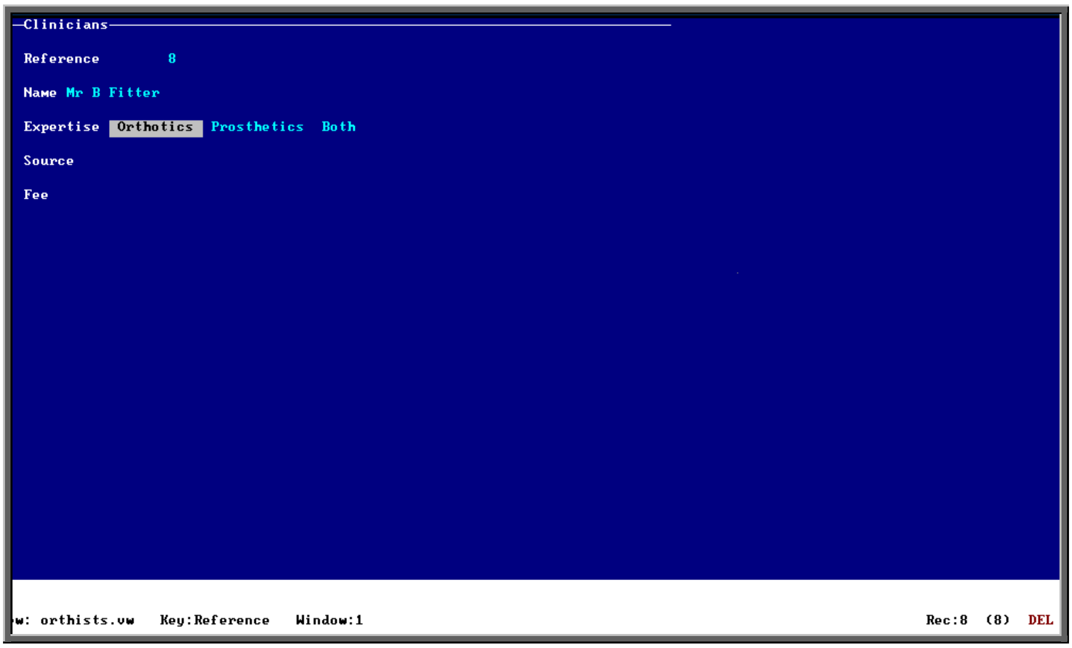
File, Print

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

Delete

Edit, Delete

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 Delete again and this will re-activate the record.

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

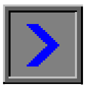
7. Standard Keys

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

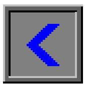
F2	enters today's date
F3	moves back to the previous field
F4	moves on to the next field
F7	reformats multiple line fields to wrap correctly within the box
F8	deletes the data in the current field
Ctrl-F8	deletes the data in the current line (when in a table)
F9	inserts the same data that you entered 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

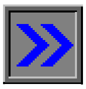
When you are looking at records, the following movement icons and keys are standard.



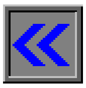
Moves to the next record **F6**



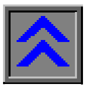
Moves to the previous record **F5**



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

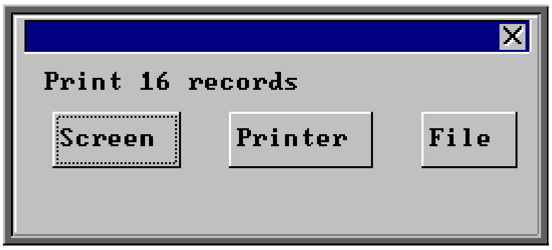
Date of Or	Order No	Sup	Desc	Received
01/10/1999	G00254	888	COLLAR	01/10/1999
20/07/1999	G00242	888	COLLAR	20/07/1999
19/07/1999	G00241	012	SHOES	26/07/1999
26/05/1999	G00239	041	PIEDROS	08/07/1999
17/05/1999	G00234	083	SHOES	06/08/1999
04/05/1999	G00231	121	CALIPER	04/05/1999

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.

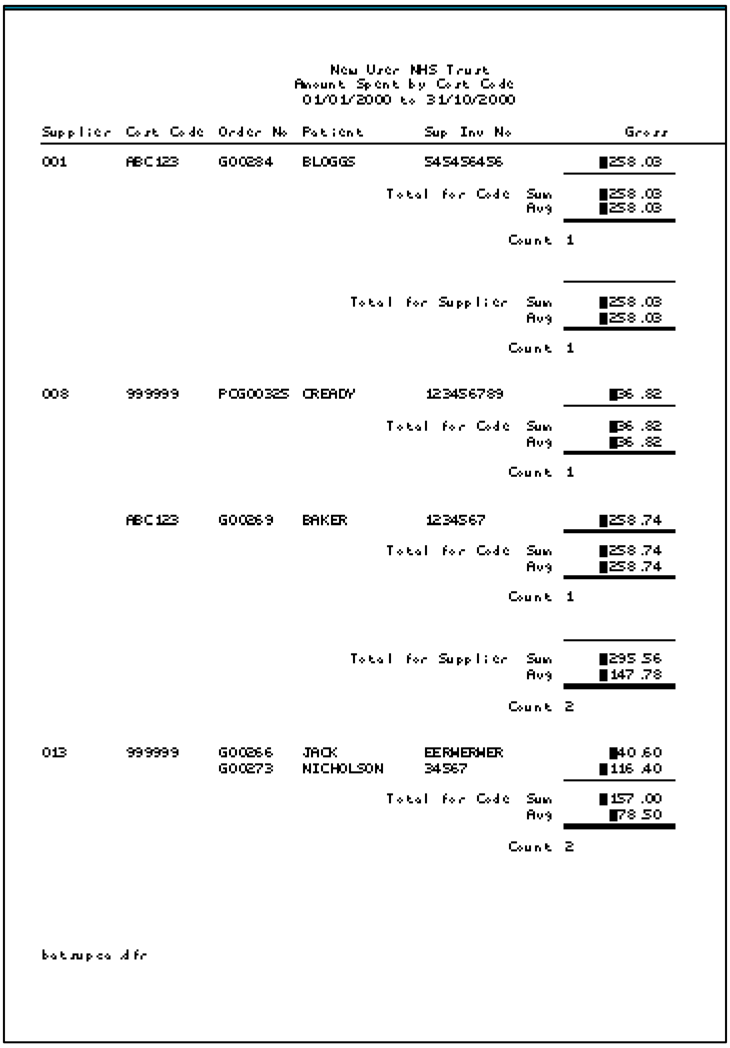
To return to the main screen press **Alt-R**, or click anywhere on the screen (where there is not a table) with the mouse.

10. Printing reports to screen

Most 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			258.03
					Total for Code	Sum	258.03
						Avg	258.03
						Count	1
					Total for Supplier	Sum	258.03
						Avg	258.03
						Count	1
008	999999	PCG00325	CREADY	123456789			36.82
					Total for Code	Sum	36.82
						Avg	36.82
						Count	1
	ABC123	G00269	BAKER	1234567			258.74
					Total for Code	Sum	258.74
						Avg	258.74
						Count	1
					Total for Supplier	Sum	295.56
						Avg	147.78
						Count	2
013	999999	G00266	JACK	EERWERWER			40.60
		G00273	NICHOLSON	34567			116.40
					Total for Code	Sum	157.00
						Avg	78.50
						Count	2

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The following keys can be used:

F5 shows the previous page

F6 shows the next page

F7 reduces the magnification

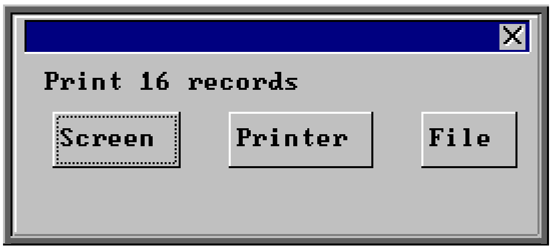
F8 increases the magnification

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.

11. Saving reports to file

Most reports within OPAS can be saved to a file.



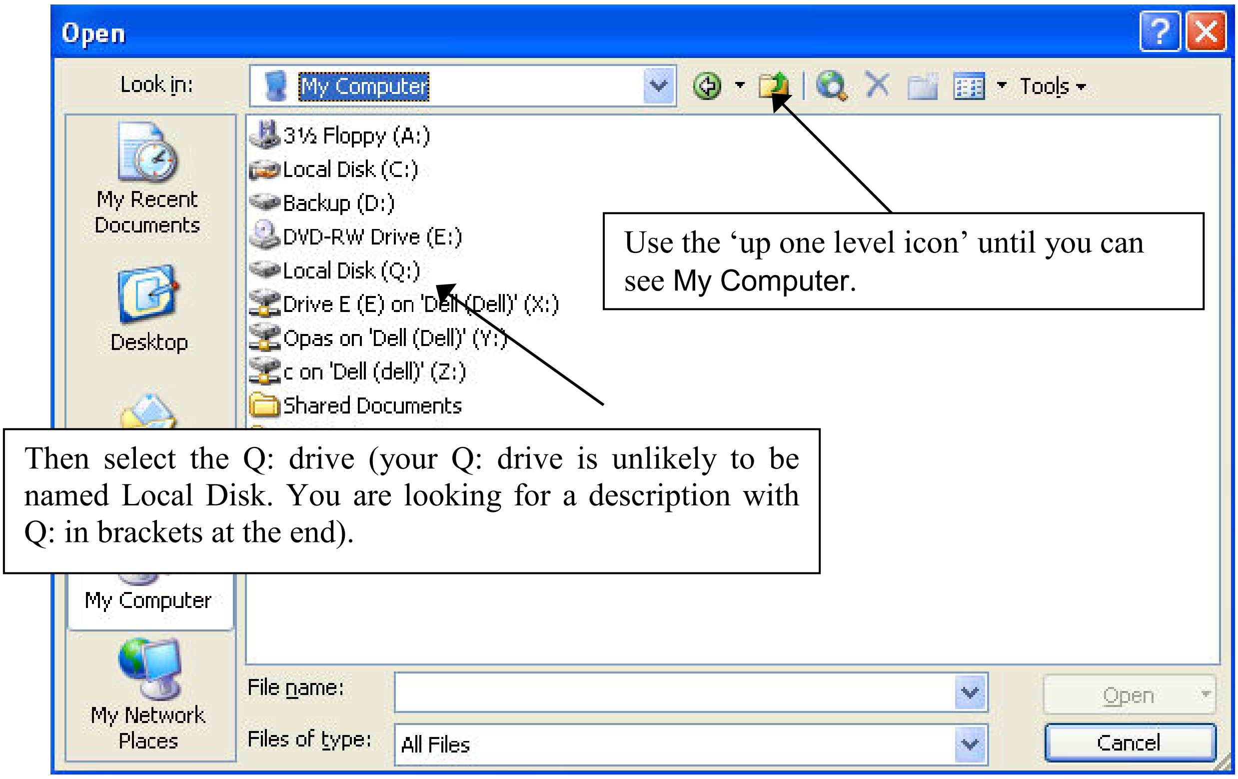
If you select File, a comma separated variable file will be created.

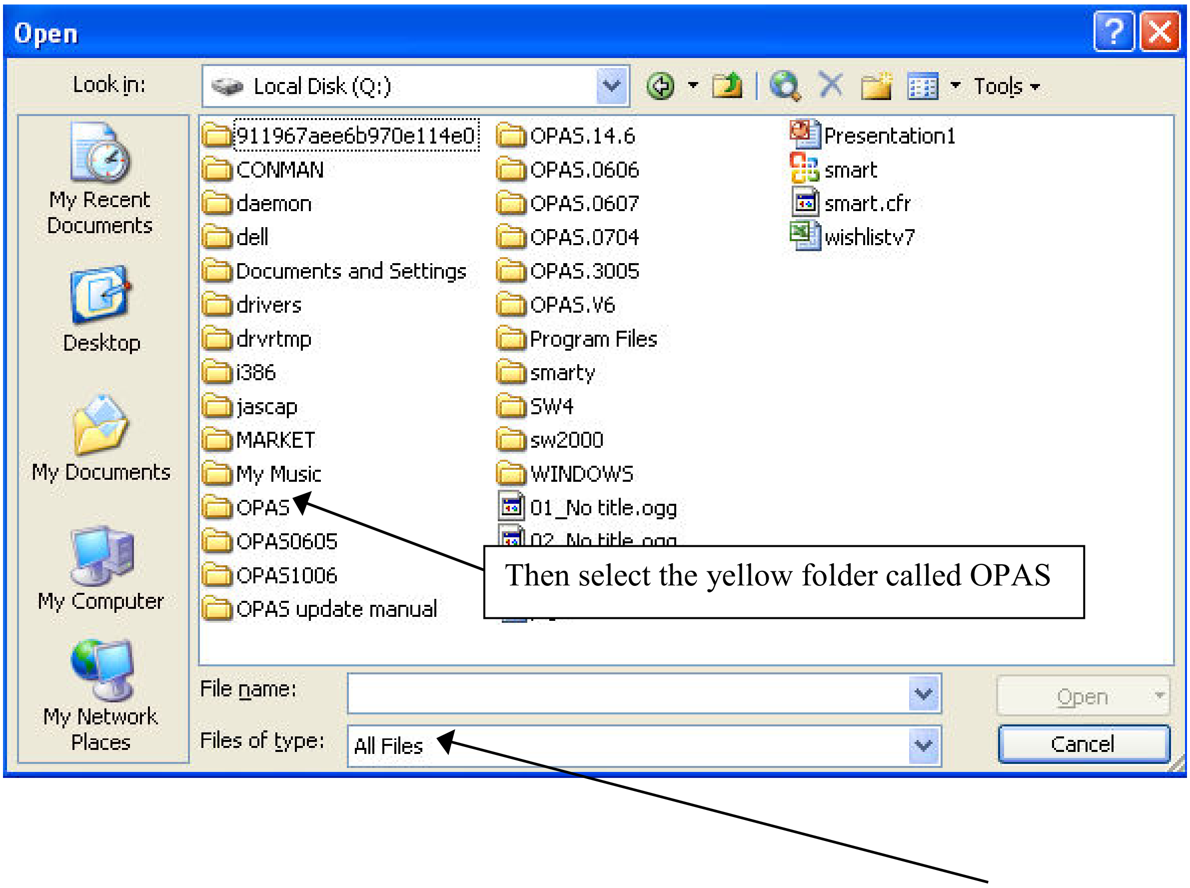
The file will always be saved in your personal directory within OPAS (i.e. Q:\OPAS\(username)), but the file name will be different for each report.

This can now be exported into Lotus123 or MS Excel or sent as an attachment in email.

Opening a report file in MS Excel

Within MS Excel select File, Open from the menu at the top of the screen.

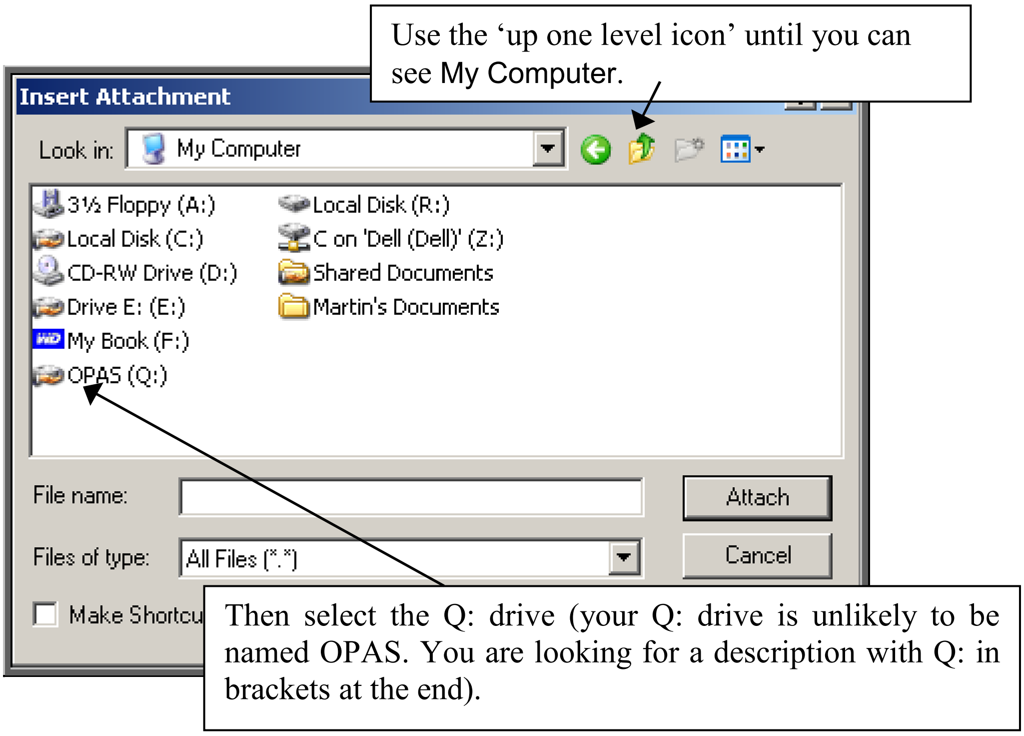


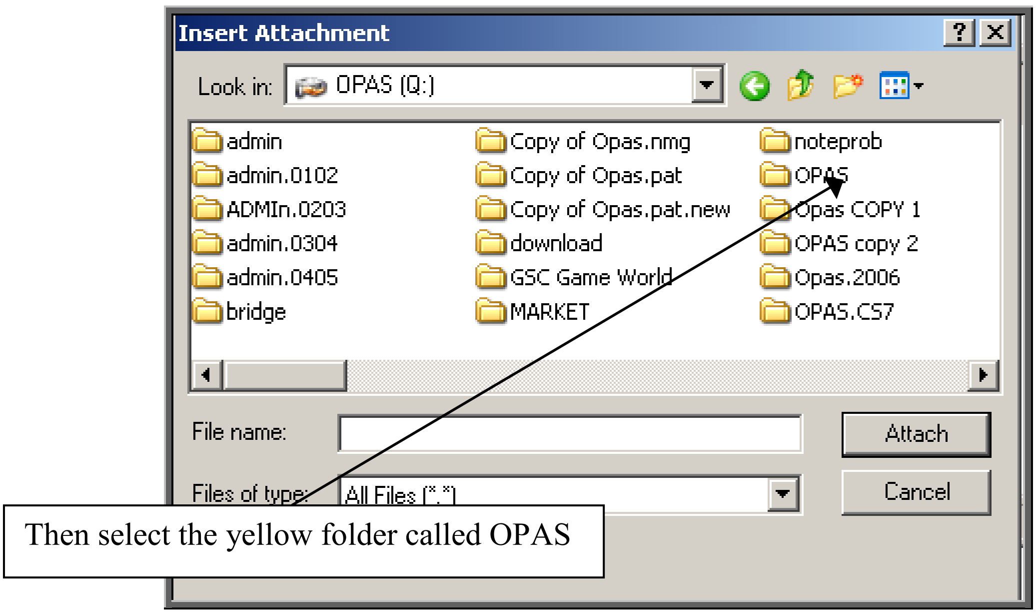


Then select your personal folder (i.e. your name). Ensure that All Files is selected, and then you will be able to see and choose the report file to be opened.

Attaching to an email

To send a report file as an attachment in email, create an email message to the person concerned and then click on 'add attachment' (you may have a big paper clip icon instead).





Then select your personal folder (i.e. your name). You should then be able to see the report file to attach to your email.

Patients

18. Making an appointment

19. Amending an appointment

20. Cancelling an appointment

21. Carbon Copies

22. This

23. Sending patient letters

24. Printing HSA5/WF1 Forms

25. Paslink

26. GP

27. Mobility

28. Dormant patients

1. Introduction

The Patient screen is the key screen in OPAS.

Only from the Patient screen can you add:

- Patients
- Orders
- Notes
- Prescriptions
- Care Episodes
- Contacts
- Patients to the waiting list

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

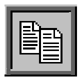
- Personal details
- Orders
- Notes
- Appointments
- Prescriptions
- Care Episodes
- Contacts
- DNA's
- Waiting list entry
- Old address history
- Letters sent

Also from the Patient screen you can:

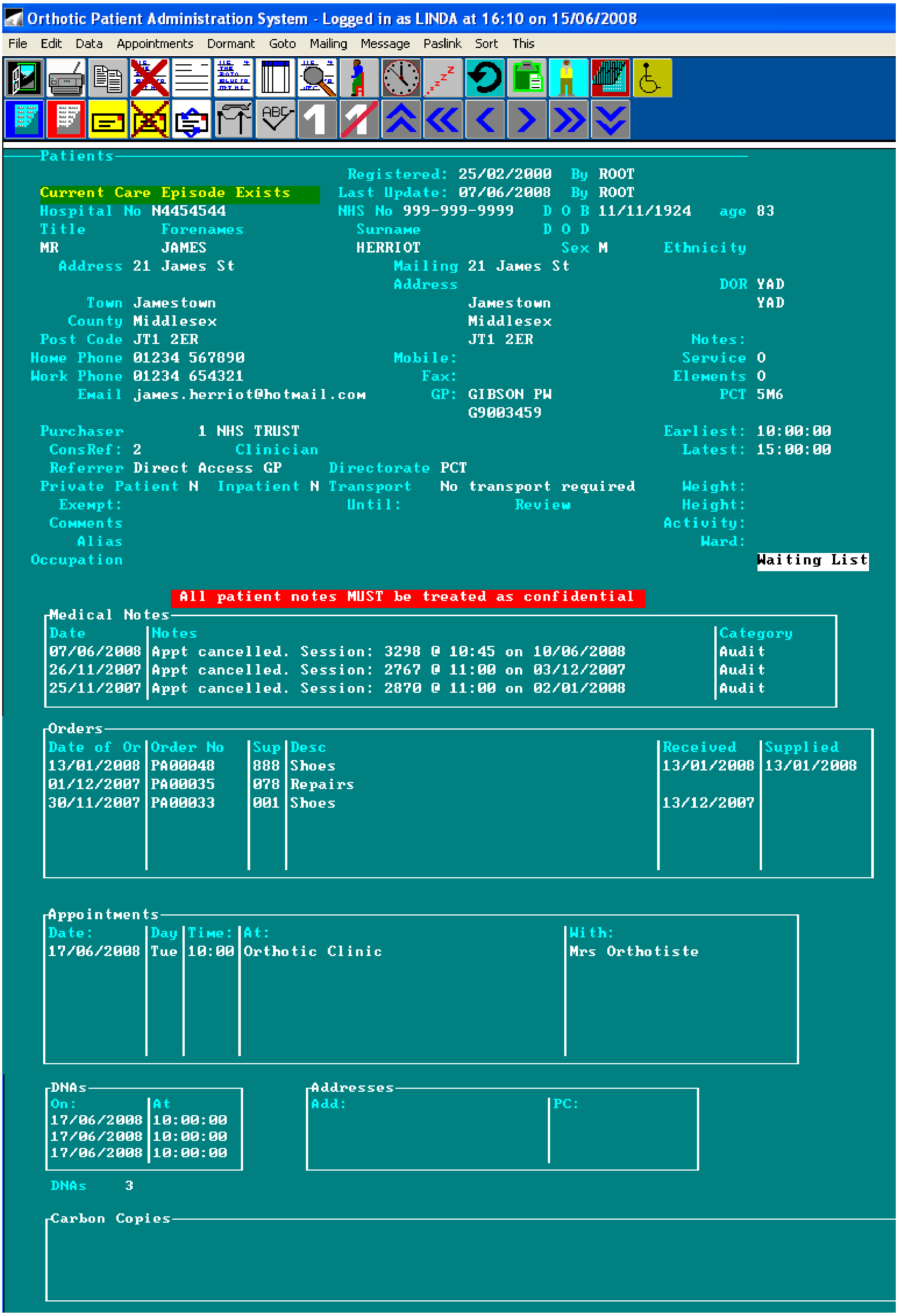
- Make appointments
- Print HSA5 and WF1 Forms
- Print patient details
- Mail merge patient details with standard letters
- Send internal messages

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  (File, Swap)

Patient Screen (Long)



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	Mobility
Orders	DNA's
Appointments	Address history
Archived Appointments	Carbon Copies
Prescriptions	

Each user can choose which summary tables are seen on the 'long' version of the Patient screen, by selecting which screen template they want to use. How to do this is explained later in this introduction.

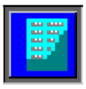
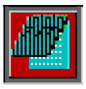
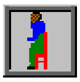
Only a few records are shown within the tables, but there may be more. To see further records in the table, press **Alt-T** to see a list of tables available. Move the arrow cursor (using the space bar on the keyboard) until the arrow cursor is pointing at the required one.

```
Tables
 ⟹ Medical_Notes    Orders    Appointments    Prescriptions    DNAs
    Carbon_Copies
```

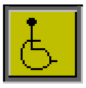
Alternatively click inside the table with the mouse. Then use **PgDn** and **PgUp** to scroll up and down the table.

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		(Goto, Notes)
Orders		(Goto, History, Current)
Appointments		(Appointments, Current)
Archived Appointments		(Appointments, Archived)

Prescriptions (Goto, Prescriptions)

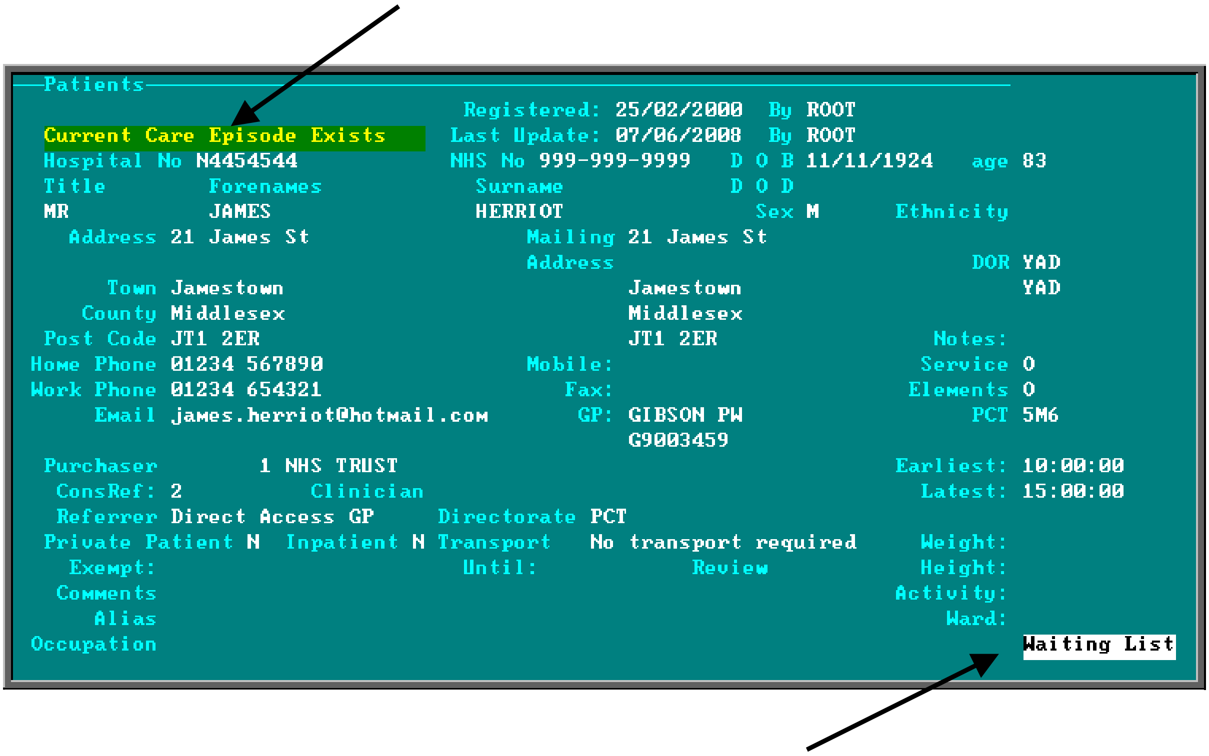
Mobility  (Goto, Mobility)

DNA's (Goto, DNAs)

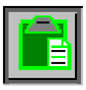
Carbon Copies (Goto, Copies)

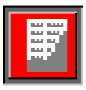
Address history (Goto, Addresses)

The Patient screen will also indicate if the patient has a current care episode or if they are on the waiting list.

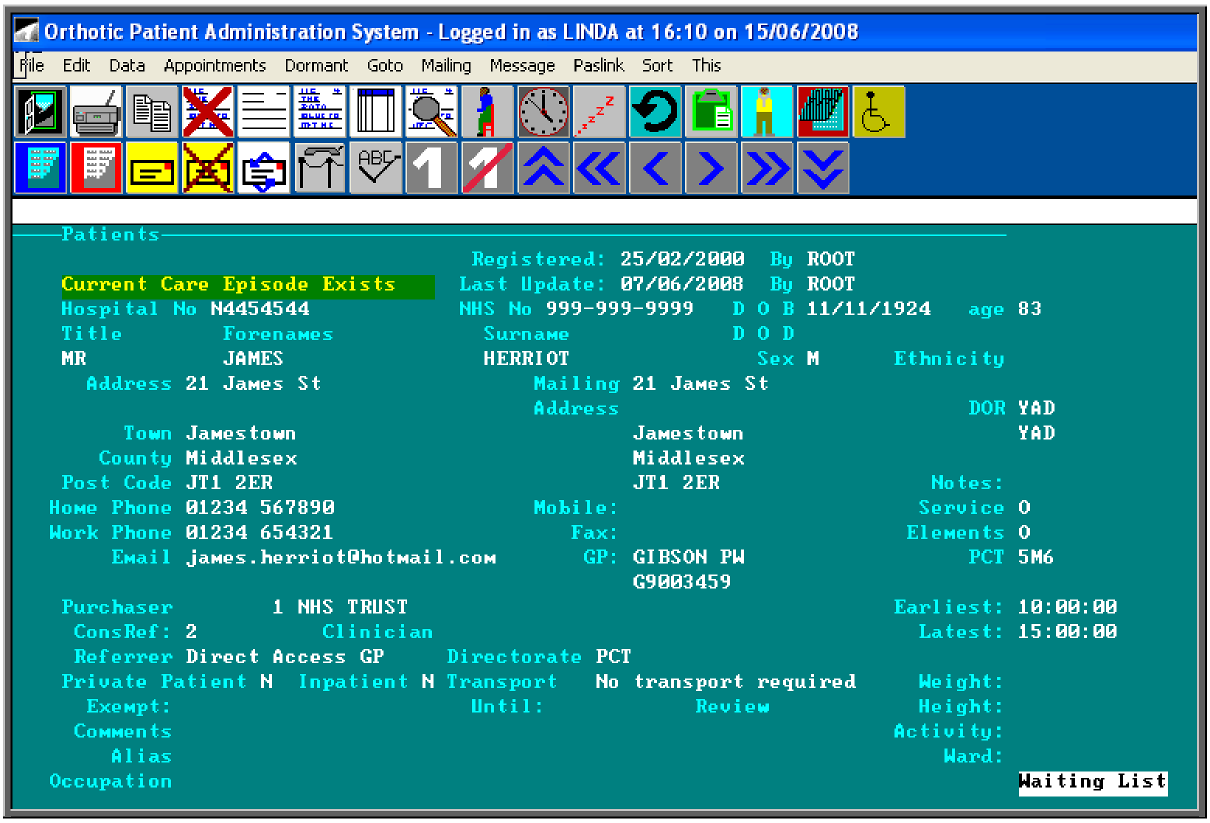


Below are the icons and menu options for accessing these from the Patients screen.

Care Episodes  (Goto, Care, Current)

Waiting List  (Goto, Waiting List, Current)

Patient Screen (Short)



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.

Selecting 'long' Patient screens

Go into Utilities – Choices – Patients – Interface.

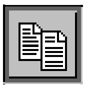
Screen	Case	Notes	Orders	Appoints	ArchAppt	Prescrip	Mobility
VERBOSE	UPPER	Yes	Yes	Yes	No	No	No
VERBOPE	UPPER	Yes	Yes	Yes	No	Yes	No
VERBOME	UPPER	Yes	Yes	Yes	No	Yes	Yes
VERBOWE	UPPER	Yes	Yes	Yes	No	No	Yes
VERPOSE	Proper	Yes	Yes	Yes	No	No	No
VERPOPE	Proper	Yes	Yes	Yes	No	Yes	No
VERPOME	Proper	Yes	Yes	Yes	No	Yes	Yes
VERPOWE	Proper	Yes	Yes	Yes	No	No	Yes
VARBOPE	UPPER	Yes	Yes	Yes	Yes	Yes	No
VARPOPE	UPPER	Yes	Yes	Yes	Yes	No	No

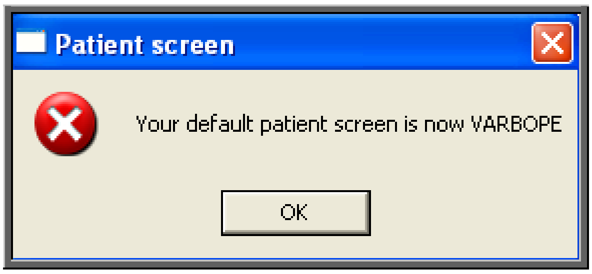
This screen summarises the screens, showing which tables are included.

The *Case* field indicates whether the Patients name and Address will default to UPPER or Proper case when entered.

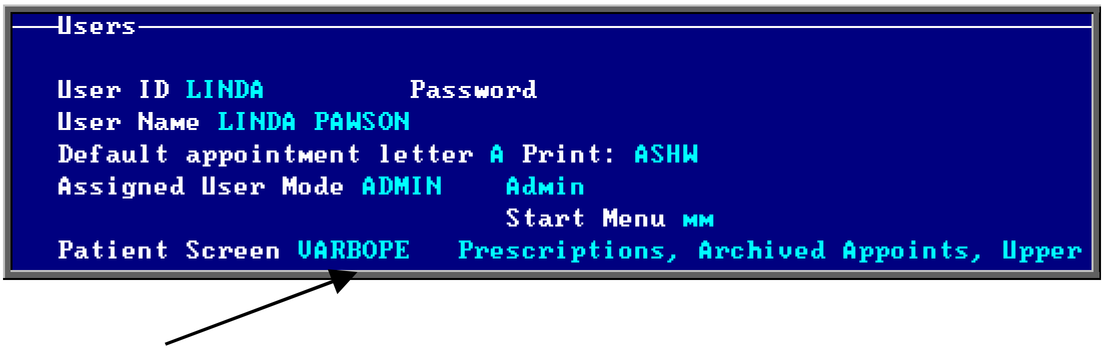
To help you choose which screen to use, highlight an option and click on View at the top of the screen to see what it would look like.

Note: If you want to use prescriptions in OPAS, you must select a screen that includes the prescriptions table.

Once a decision has been made, click on the 'swap'icon  (Use) from the view screen or the interface summary.



You can see which screen is used for your log-in at any time, by going into Utilities – Users.



If the *Patient Screen* field is blank, OPAS will default to the VERBOSE screen for that user.

2. Entering a new patient

Menu: Patients

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

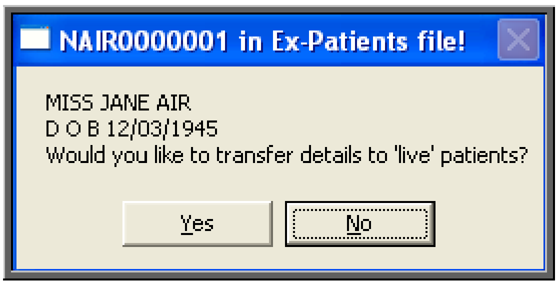
To select **Patient**, single click on the **Patient** button with the mouse, or type **P**, or press **Enter**.

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 one of two things will happen, depending whether the patient already on OPAS is a 'live' patient (by this we do not mean alive, but that they are a current patient!) or an Ex-Patient (a patient that has been archived).

1) If the patient is a 'live' patient you will be taken out of enter mode and the patient with that hospital number will be shown on the screen.

2) If the patient is an Ex-Patient you will be given the option to reinstate the patient into the 'live' patient area.



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.
D O D	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.
Title	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 – Patients – Titles
Forenames	e.g. **ALAN DAVID**. If you type in lower case, it is automatically converted to upper case or proper case, depending on which 'long' screen is being used.
Surname	e.g. **WILSON**. If you type in lower case, it is automatically converted to upper case or proper case, depending on which 'long' screen is being used.
Sex	is automatically shown as M or F depending on the *Title*. If it is blank (because the title could be male or female (e.g. Doctor)), type in the appropriate letter.
Ethnicity	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 – Patients – Ethnicity)
Address	gives five lines for the address. If you type in lower case, it is automatically converted to upper case or proper case, depending on which 'long' screen is being used. There is an option on the *Town* and *County* fields to press **Tab** to select from a pop-up list. (Towns and Counties to appear in the pop-ups should be set up in Utilities

– Choices – Patients – Towns and Utilities – Choices – Patients – Counties). Alternatively defaults can be created in Utilities – Choices – Defaults.

Mailing Address 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. If pop-ups have been created for Town and County on the main address, these can be used in the *Mailing Address* too.

Home Phone enter if required.

Work Phone enter if required.

Mobile enter if required.

Fax enter if required.

Email enter if required.

GP select from the pop-up menu if known.

Purchaser 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)

ConsRef select from the pop-up menu of Referrers. (Referrers to appear in the pop-up should be set up in Utilities – Choices – Referrers)

Clinician select from the pop-up menu if required. (Clinicians to appear in the pop-up should be set up in Utilities – Choices – Clinicians)

Private Patient type **Y** if the patient is a private patient, otherwise type **N**.

Inpatient type **Y** if the patient is an in-patient, otherwise type **N**.

Transport 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 – Appointments – Transport)

Exempt enter the prescription charge exemption evidence if applicable. (Exemption reasons to appear in the pop-up should be set up in Utilities – Choices – Patients – Exempt)

Until if the exemption evidence has been entered, enter here the date of its expiry, in the format DD MM YYYY.

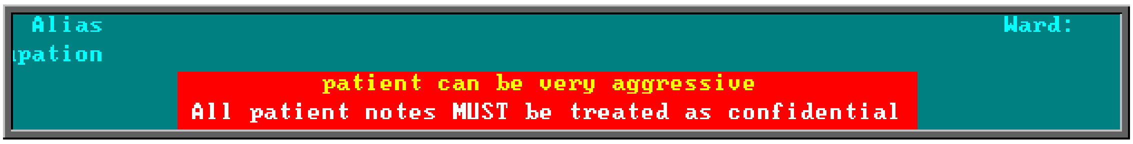
Review enter the date the patient is to be reviewed, in the format DD MM YYYY.

Comments enter any additional comments required for this patient.

Alias 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.

Occupation enter the patients occupation.

Special Instructions this field is invisible until something is entered into it and then it becomes highlighted to draw your attention.



DOR is District of Residence. If *Auto-update DOR* 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 *Post Code* field of the address.

Notes indicate whether paper notes are held by entering Y(es) or N(o)

If Y is entered the patients name will be painted yellow.

Service if multiple services are using OPAS, select the service the patient belongs to from the pop-up list. . (Service options to appear in the pop-up should be set up in Utilities – Choices – Patients – Services)

Earliest enter the earliest appointment time the patient can attend.

Latest enter the latest appointment time the patient can attend.

Weight enter the patients weight in kilos if known.

Height enter the patients height in metres if known.

Activity enter the patients mobility on a scale of 1 to 5 (1 being low – 5 being high).

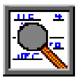
Ward press **Tab** to select from the list of wards, if required. (Wards to appear in the pop-up should be set up in Utilities – Choices – Wards)

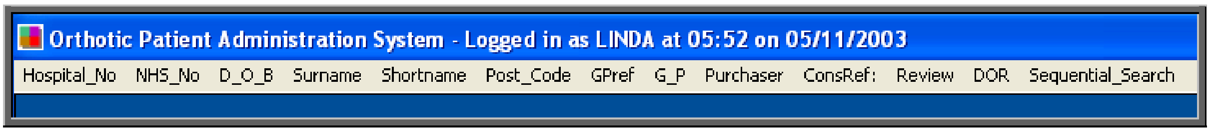
You do not have to go through all the fields on the Patient screen. Once all the relevant data has been added, press **Ctrl-Enter** to save the record and to start adding the next patient.

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 6. Choices - Defaults).

3. Finding a patient's record

Menu: Patients

To find a patient click on the 'find' icon  (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 (UPPER or Proper) as it appears on the patient record.

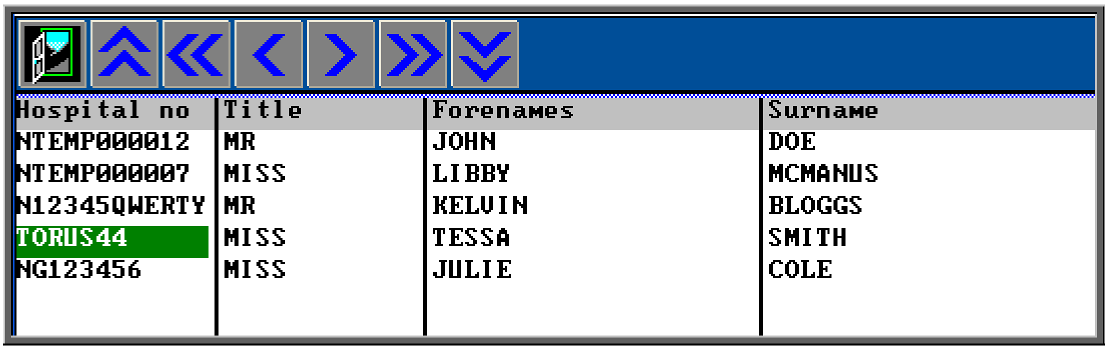
You will then be taken to the patient record with the nearest match. If there is more than one patient with the same surname you will see the first patient with that surname. The patient's are now in alphabetical order of their surname so by clicking on the 'arrow' icon (**F6**) you can step through the patients with that surname until you find the patient you are looking for. Alternatively, select the 'browse' icon (Data, Browse) to see those records that match your search in a list. (see Moving around OPAS – Note 6. Standard menu options).

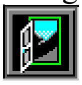
If you are looking for a patient with a surname that occurs frequently it may be quicker to search by Shortname as you can then specify the initial of their forename to narrow down the search. Type in the first 8 characters of the surname, a space, and then the initial of the forename. N.B. Searching by Shortname is not case sensitive i.e. it does not matter if you type the Shortname you are looking for in UPPER or Proper 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' icon (**F6**), or by selecting the 'browse' icon (Data, Browse) to see those records that match your search in a list.

Bookmarked patients

When you want to find a patient that you know you have worked on earlier, click on the 'back' icon (Goto, Bookmark), and you will be presented with a list of patients that you have dealt with since you logged on. The list will be in order with the patient you worked on most recently at the top. If you have dealt with a patient on a number of occasions, there name will only appear once, and be in position of the last occurrence.



To go back to one of the patients in the list, click on the patient so the green highlighter is on the correct line, and then click on the 'exit' icon  (File, Return).

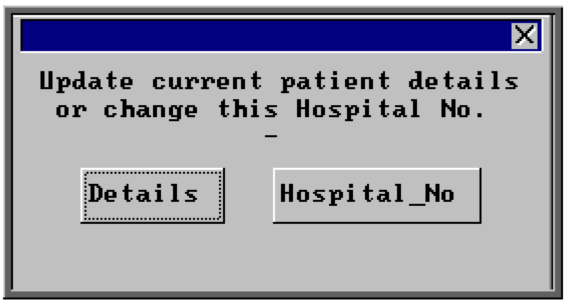
A patient can be bookmarked manually if you know that you will want to go back to that record shortly. Click on This at the top of the Patient screen and select Bookmark.

Note: The list of bookmarked patients is cleared when you log out of OPAS, so will only show patients since you logged on.

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  (Edit, Update) 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
Town
County
GP
Purchaser
ConsRef (Referrer)
Clinician
Transport
Service
Ward

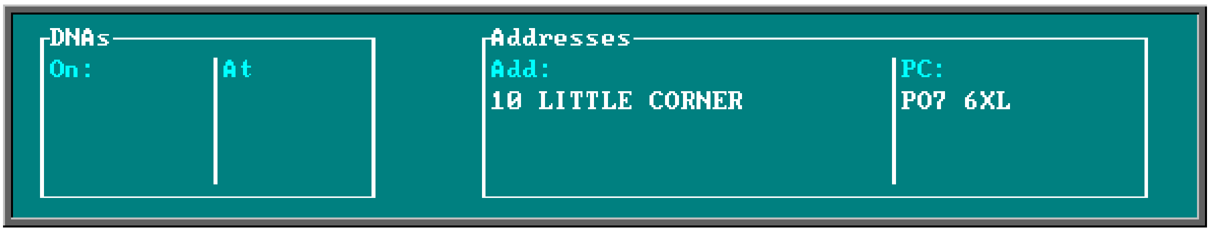
When you have finished updating the patient record, press **Ctrl-Enter** to save the changes.

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's record and clicking on Goto at the top of the screen and then selecting Addresses.

Alternatively, a summary of their last three addresses can be seen by pressing the 'arrow' icon  (**PgDn**) to go to the bottom of the screen where the *Addresses* table is located.



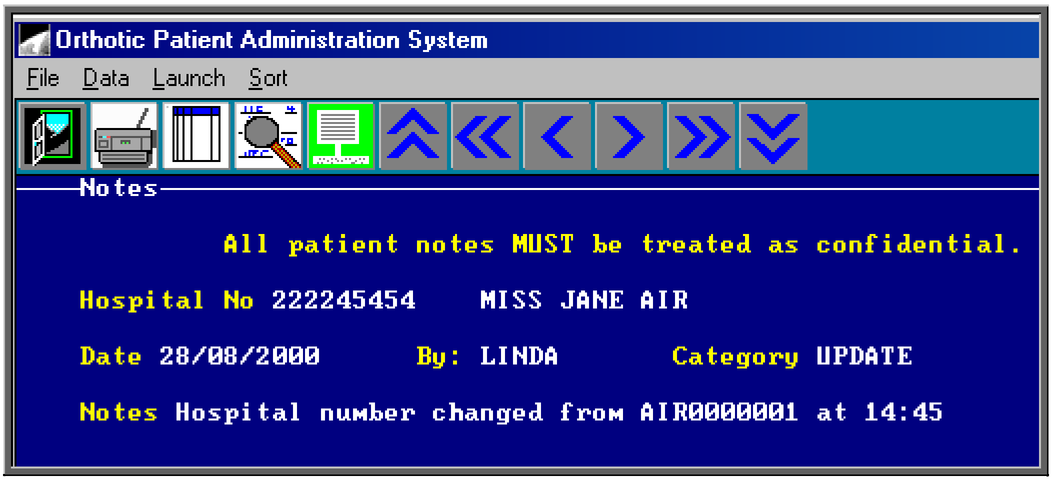
Hospital number

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

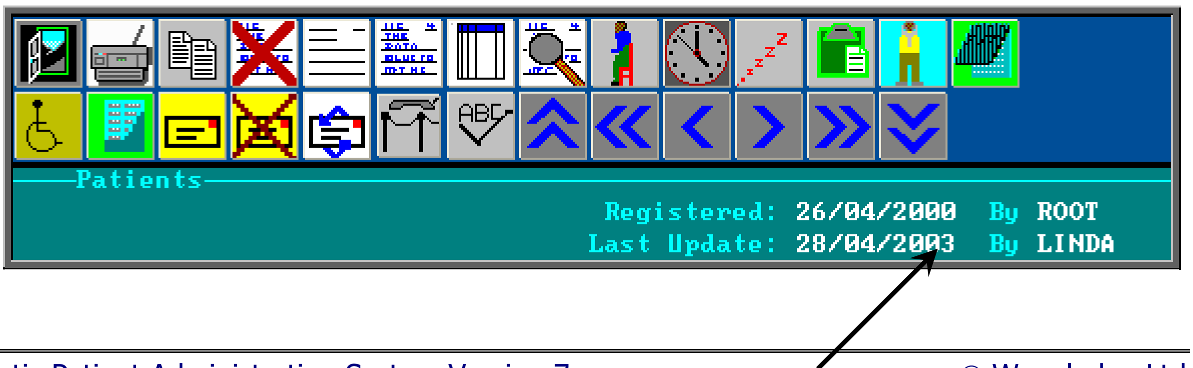
This is used to enter the correct Hospital Number for a patient who's Hospital Number was not known when they were entered onto the system and therefore a temporary number was allocated or the Hospital Number was entered incorrectly.

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.

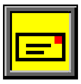


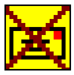
5. Changing the mailing address

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.

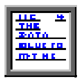
If a temporary mailing address is shown for a patient, that address is used for letters; if not, the permanent address is used.

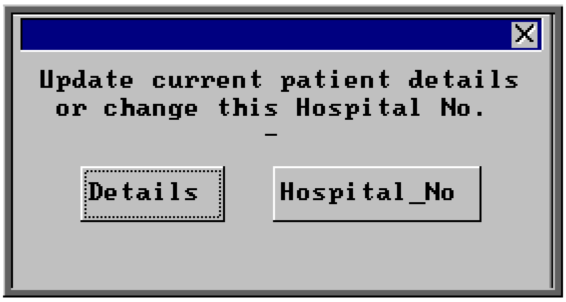
To add a new mailing address or to change an existing one, click on the 'mailing' icon  (Mailing, Input). You are prompted (in the bottom left corner of the screen) to enter each line of the new temporary mailing address in turn. The current temporary mailing address (if any) is shown and can be changed or deleted line by line using **F8** and the new temporary address typed.

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

6. Deceasing a patient

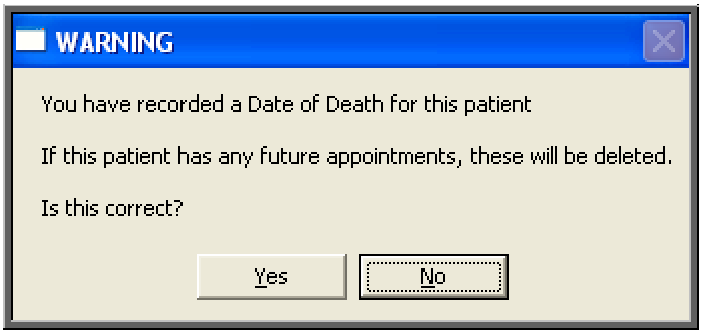
Menu: Patients

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



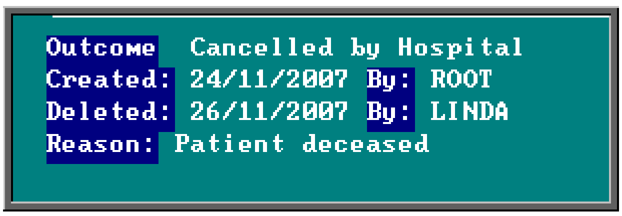
Select Details and move to the *D O D* (Date of Death) field. Input the date of death in the format DD MM YYYY. If you wish to enter today's date press the **F2** key.

When you press **Ctrl-Enter** to save the changes OPAS will notice that a date of death has been recorded and give you the following prompt.



It is important that at this point you confirm the correct patient has been updated. Once Yes has been selected, OPAS will find any future appointments and cancel them, so that the slots can be freed for another patient. If OPAS can see that transport was booked for any of the appointments, then the following message will appear.

The appointment cancelled will be updated with an *Outcome* of 'Cancelled by Hospital' and a *Reason* of 'Patient deceased'. An automatic note will also be created in the patients notes.

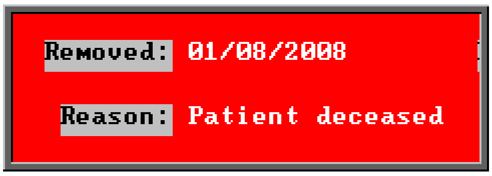


Orders

Once any future appointments have been dealt with, OPAS will then look to see if the patient has any orders where the goods have not yet been supplied.

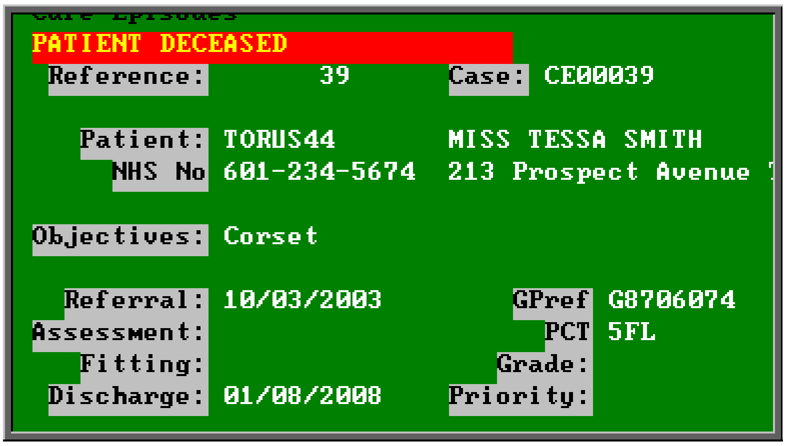
Waiting List

If the patient is on the waiting list, they will be removed from the waiting list.

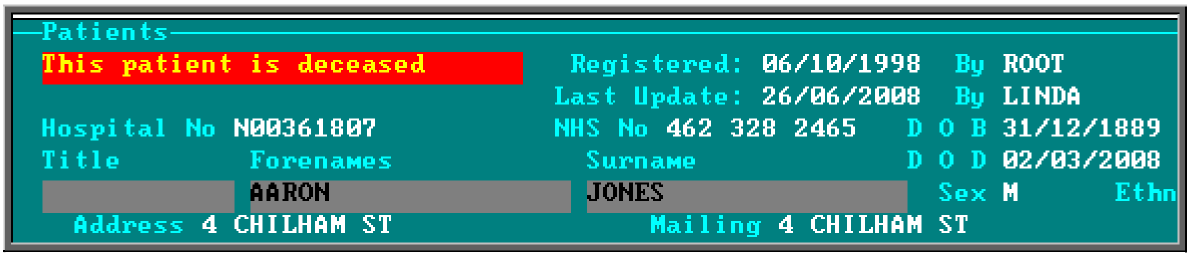


Care Episodes

If the patient has any care episodes, they will all be marked as discharged.



The patient record will then be marked to show that they are deceased, and OPAS will not let you raise new orders, care episodes or appointments.



However, you do have the ability to add patient notes to a dead patient.

If an ad hoc letter note is created, the letter will be addressed to 'The Executors and Trustees of' the patient.

Note: 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. Deleting a patient

Menu: Patients

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

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

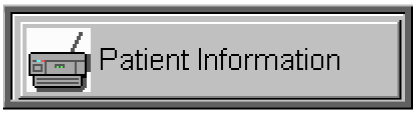
Deleting a patient does not delete any orders or appointments for that patient.

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 26. Ex-patients)

8. Printing options

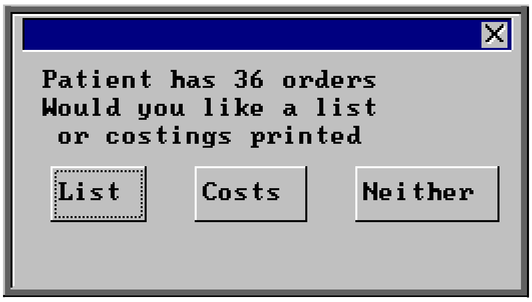
Menu: Patients

Click on the 'print' icon (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.

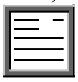
By selecting Custom Report and then clicking on This_view, you will see the reports that can be run from the Patient screen. These are designed for use in conjunction with database queries. Standard reports available from the Reports option are more 'user-friendly'! (see Reports – Notes 52 to 58)

By selecting Letter 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 15. Choices - Letters). There are also two forms, HSA5 and WF1, set up for you (see – Patients – Note 23. Printing HSA5/WF1 forms).

9. Prescriptions

Menu: **Patients**

If you use the prescriptions facility in OPAS (i.e. you are using a patient screen that includes the prescriptions table) then prescription details has to be entered for each patient and each order/care episode is assigned to a prescription. This means that the relevant prescription must be entered onto the system before an order or care episode 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  (Edit, Enter) and the box below will appear.

If you do not use the prescriptions facility (i.e. you are using a patient screen that does not include the prescriptions table), then Prescriptions will not appear as an option in the box above.

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

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

Patient Patient name will be brought through from the patient record.
Sex (M)ale or (F)emale will be brought through from the patient record.

DOB DOB will be brought through from the patient record.

Purchaser 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.

Description 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)

Referrer 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.

Orthosis code 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).

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

Length is entered as the number of years for which the prescription is valid.

Order No is entered automatically by the system: it is a sequential number, not the number of an order raised against the prescription.

Notes additional information can be entered as required.

GPRef GP Ref will be brought through from the patient record and cannot be changed.

PCT PCT information will be brought through from the patient record and cannot be changed.

NHS No the patient's NHS number will be brought through from the patient record and cannot be changed.

Updating prescriptions

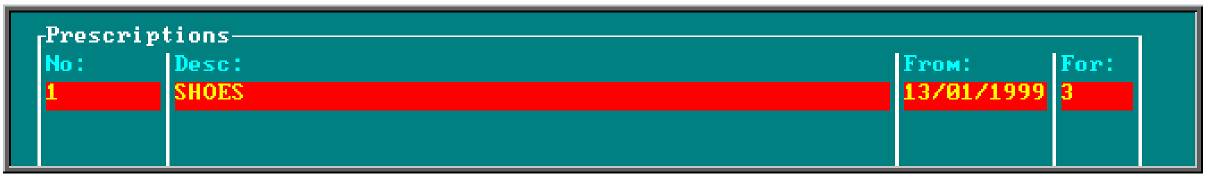
Find the patient that the prescription relates to and click on Goto, Prescriptions. Find the relevant prescription if there is more than one and then click on the 'update' icon  (Edit, Update) to amend any of the details entered on the prescription.

Cancelling prescriptions

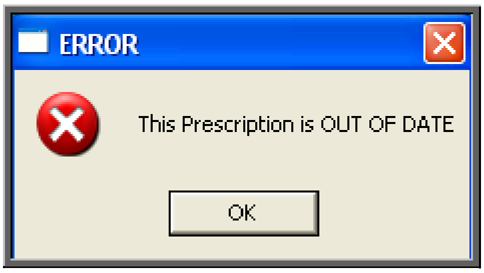
Prescriptions should not be cancelled. If you wish to cancel a prescription, follow the steps above for updating prescriptions, and amend the *length* of the prescriptions to ‘0’ years. The prescription will then be no longer valid and orders and care episodes cannot be assigned against it.

Expired prescriptions

Prescriptions are highlighted with a red banner once they have expired.



If you try to assign an order or care episode to an expired prescription, the following message will appear.



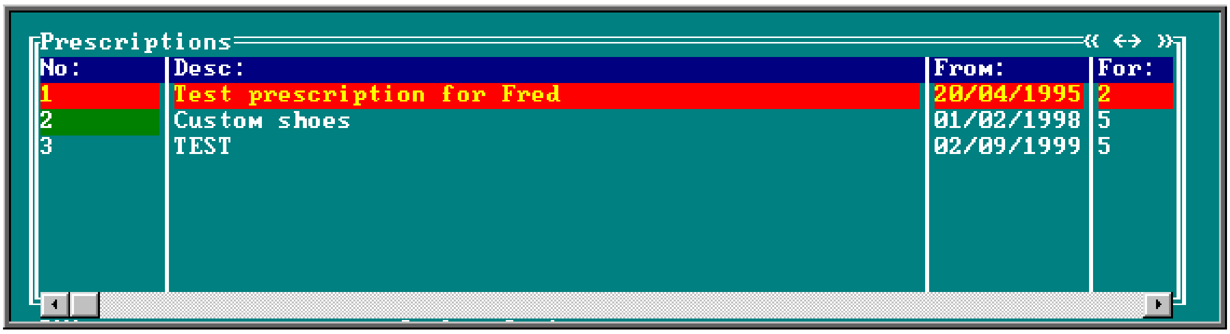
10. Adding a care episode

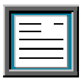
A care episode is a means of grouping together orders, notes and appointments that relate to a specific episode of care. Care episodes can also be used for tracking the pathway of the referral.

Menu: Patients

Find the patient that you wish to add a care episode.
If you are not using prescriptions move onto step 2

If you are using prescriptions you will then have to select which prescription this care episode is going to be assigned to. To do this, press the ‘arrow’ icon  (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 a care episode to a Prescription if it has expired.



Click on the ‘enter’ icon  (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. NB. If you are using care episodes to send information to the main hospital system with regards to the 18 week journey, then the case number entered here must be the RTT case number issued at the start of that journey.
Patient:	Hospital No and patient name will be brought through from the patient record.
Objectives:	free text available to outline the objectives of this care episode.
Referral:	date of referral. This will default to today’s date, which can be changed or taken out by pressing **F8**.

Assessment:	date of assessment
Fitting:	date of fitting
Discharge:	date of discharge
Consref:	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.
Purchaser:	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.
Clinician:	Clinician 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 Clinicians and make an alternate selection. Otherwise press the **Enter** key to move to the next field.
Orthosis:	select an orthosis code from the pop-up list
Grade:	enter a grade for the episode
Priority:	enter a priority for the episode
Referred:	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)
Diagnose:	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)
Intervention Type:	select the intervention type from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Intervention)
Initiator:	select an initiator from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Initiators)
Primary Source	select the original referrer of the patient from the pop-up list
Primary Date	enter the original referral date

Primary Assessment enter the date of the assessment made by the original referrer

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.

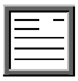
To learn more about care episodes go to Section 4 – Care Episodes.

11. 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.

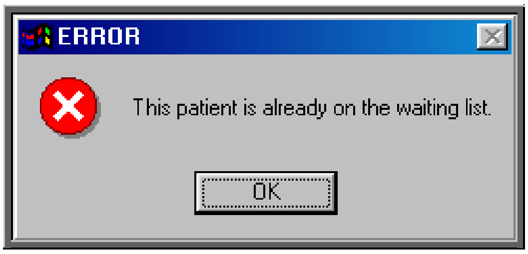
Menu: Patients

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

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

Click on Waiting List (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.

Referral Date: enter the date of referral. The field will default to today's date but this can be overtyped.

Type: select from the pop-up list by highlighting the required type and pressing the **Enter** key or by double clicking on it with the mouse.

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.

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

Purchaser 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.

Referrer: 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 purchasers and make an alternate selection. Otherwise press the **Enter** key to move to the next field.

Venue: select a venue from the pop-up list. Otherwise press the **Enter** key to move to the next field.

Clinician select a clinician from the pop-up list. Otherwise press the **Enter** key to move to the next field.

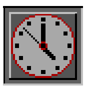
Length The length of appointment can be entered here. This is to assist when making an appointment.

APE Whether the patient requires an **A**M, **P**M or **E**vening appointment can be entered here.

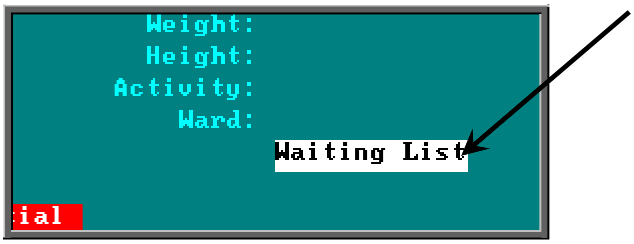
Service Service will be brought through from the patient record but it can be changed to another service as long as it is a service that is assigned to the patient on the Patient screen.

Tagged this option allows a waiting list entry to be tagged. Primarily this is to enable batch printing of waiting list letters.

Order No an order number can be selected from the pop-up list.

If an appointment is subsequently made from the Waiting List screen using the 'clock' icon  (Appoint, Next) or the 'autoclock' icon  (Appoint, Quick), the fields in **red** are used.

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.



To access the waiting list screen from the **Patient** screen, click on the 'waiting list' icon (Goto, Waiting List, Current).

To learn more about the waiting list go to Section 5 – Waiting List.

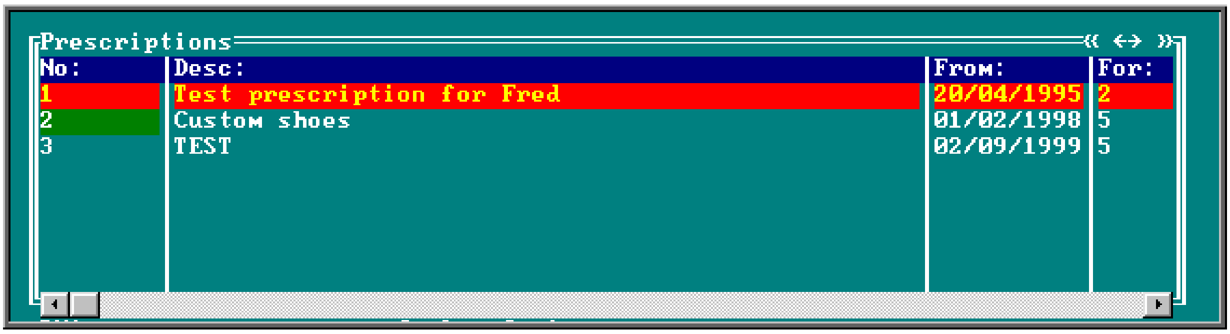
12. Adding an Order

Menu: **Patients**

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

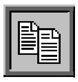
If you are not using prescriptions move onto step 2

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 (**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.



Click on the ‘enter’ icon  (Edit, Enter) and the box below will appear.

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  (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.

Hospital No	Hospital No will be brought through from the patient record.
Patient	Patient name will be brought through from the patient record.
Sex	(M)ale or (F)emale will be brought through from the patient record.
DOB	DOB will be brought through from the patient record.

Purchaser	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.
Date of Order	Today's date will automatically be entered. You can overtype with another date if required.
Order Number	The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities – Note 31. Order numbers). You can overtype 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).
Supplier	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.)
Cross Ref or Hsp Order No	This is an optional field where you may wish to quote a supplier's reference number or an internal reference number. If a blanket order number has been assigned to the supplier, this will appear automatically in this field.
Description	50 characters available to describe in simple words what the order is for. This description can 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 – History – Descriptions)
Orthosis Code	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)
Referrer	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.
In-patient	Type **N** for No or **Y** for Yes.
Paid	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 DD MM YYYY. To leave this field blank press the **Enter** key.
Receipt	If the patient has to pay for the goods, the receipt number can be entered here.

Amount If the patient has to pay for the goods, the amount they paid can be entered here.

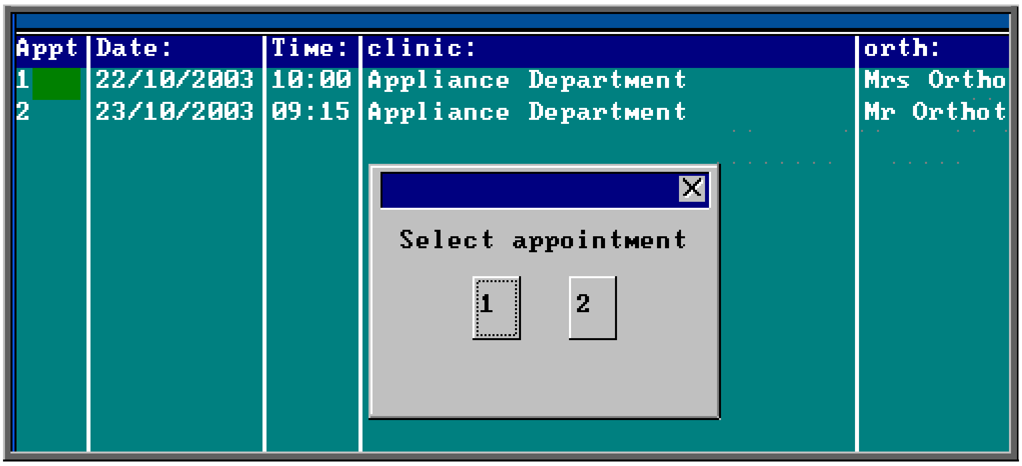
Expected Supply Date This date will be calculated from the Orthosis Code that was entered above. When the Orthosis codes are set up there is the opportunity to say how long that type of item takes to be delivered. If an Orthosis Code has been set up with a delivery of 7 days, the *Expected Supply Date* will show as 7 days from today's date. If the delivery field is not used when the Orthosis Code is set up, the *Expected Supply Date* will show as today's date. The date that appears can be overtyped with another date if required.

ACO What you enter here will determine what OPAS will do when you book the goods in as being received.

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.

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.

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 *Appointment* 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.



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 a Friday.

APE — If you enter **A** in the *ACO* field, you can specify whether the appointment made should be an **A**M, **P**M or **E**vening appointment.

Letter — If you enter **A** or **C** in the *ACO* field, you can state which letter type will be required. The field will default to your default standard appointment/collection letter (as set in Utilities – Users/Appointments – Venues).

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.

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 for the patient. If the pop-up list is empty, there are no current care episodes for the patient.

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.

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 29. 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 the vat code held against the item code but you can overtype this with an alternate VAT rate. If you have not entered an item code, the VAT code will default to S.

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 29. 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.

Technician 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 – History – Technicians.

Ward 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.

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.

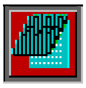
To learn more about orders go to Section 6 – Orders.

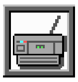
13. Re-printing individual orders

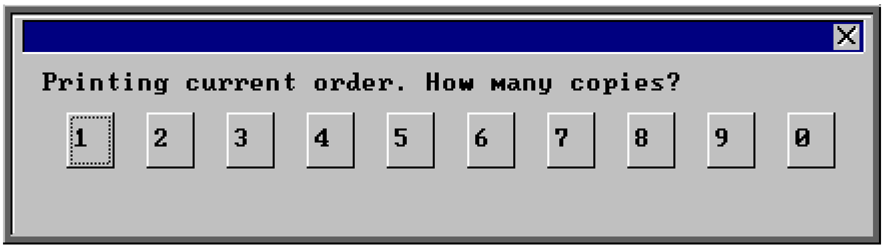
If you have lots of orders to print it is best to print them in batch (see Orders - Note 7. Printing/faxing orders in batch), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: Patients

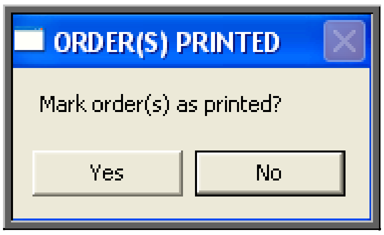
Find the patient whose order you wish to print.

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

Find the relevant order, click on the 'print' icon  (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.

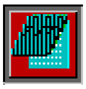
14. Re-faxing individual orders

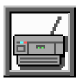
Before being able to fax orders directly from OPAS you need to:

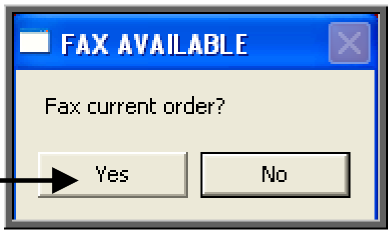
1) Enter the fax driver information in the *Fax printer* field in the system parameters screen (Utilities – Choices – System). (see Utilities - Note 24. Choices - System)

2) Identify those suppliers you wish orders to be faxed to in Utilities – Choices – History – Fax.

Find the patient whose order you wish to fax.

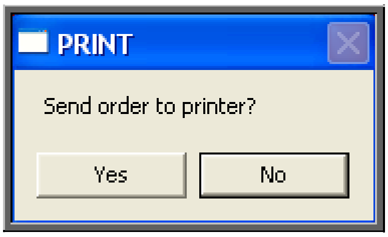
Click on the 'orders' icon  (Goto, History, Current) to show the orders for that patient.

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



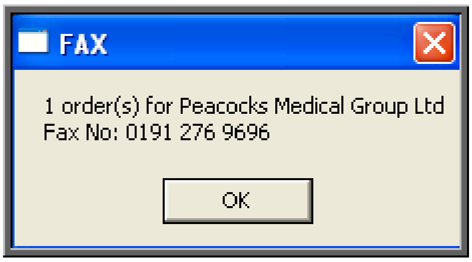
The above prompt will appear unless the supplier on the order is an internal stock supplier. If the supplier is Stock you will only be able to print the order and you will be asked how many copies are required.

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.

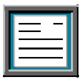
15. Entering medical notes

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 10. 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  (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 ‘scanned’ has already been set up for you. Choose this category when attaching a scanned image as a Note:

A category of ‘document’ has already been set up for you. Choose this category when attaching a document (e.g. MS Word document) as a Note:

A category of ‘SOAP’ has already been set up for you. Choose this category if adding a SOAP 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

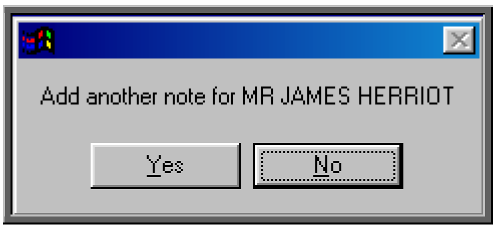
Adding a standard Note

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 'Scanned' category

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

Adding a Note using the 'Document' category

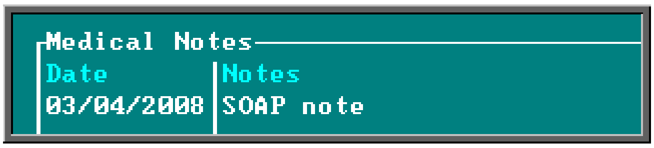
In the *Note* field type the file name (including it's extension) and path of the document file you wish to attach as a Note:

Adding a Note using the 'SOAP' category

Rather than the note text being entered into one *Notes* field, it can be entered over four SOAP note fields (*Subjective, Objective, Action* and *Plan*).

Selecting this category will jump you past the standard *Note* field and into the *Subjective* field. Once the subjective note has been typed, press the **F4** key to move to the *Objective* field. Continue to do this with each field. Press **Ctrl-Enter** when finished.

In the Notes summary table on the Patient screen, the first line of the *Notes* field is shown. As this is empty on a SOAP note, a description of SOAP note is entered here.



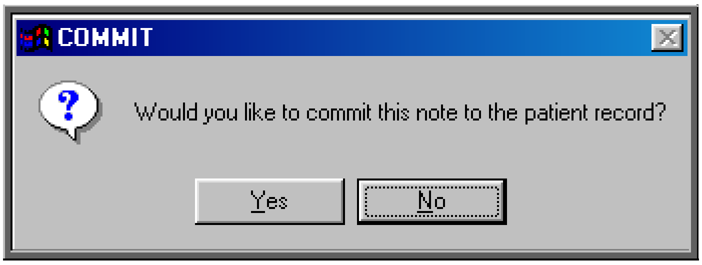
Adding a Note using the 'Temp' category

In the *Note* field press **Ctrl-Enter** or **F10** to be taken to the Text Editor. The patient's 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:

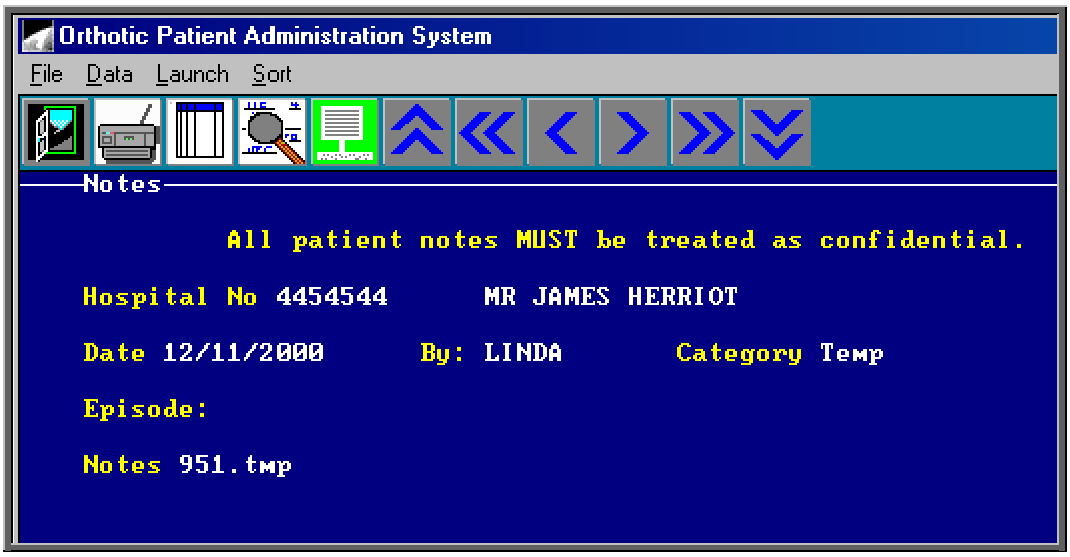
If you wish to print the temporary note press **Alt-P**

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

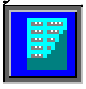
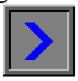


If you select Yes, the text entered in the Text Editor will be copied into the Note field of the note and saved. **You will not be able to edit this note later.**

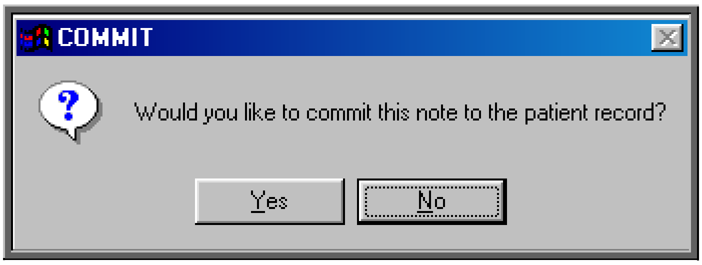
If you select No, the information typed in the Text Editor will be allocated a sequential temporary note number and this number will show in the *Note* field.



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  (Goto, Notes). Use the 'arrow' icon  (F6) to find the note you wish to edit).

Click on the 'launch' icon  (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).

Adding a Note using the 'Letter' category

In the *Note* field press Ctrl-Enter to be taken to the Ad hoc letter screen.

Letter:	Select which of the 26 available letter templates is to be used
Copies	Select the number of copies required. This will default to 1 but can be overtyped
para1-para9	Type in the required text in as many of the paragraph sections that are required. Move down the

paragraph fields using either the **F4** key or **Down-Arrow** key.

Press **Ctrl-Enter** when finished.

In the Notes summary table on the Patient screen, the first line of the *Notes* field is shown. As this is empty on a Letter note, a description of Ad Hoc letter sent is entered here.

When you are looking at a letter note, click on the 'letter' icon (Letter) to see the letter text.

If you wish to reprint the letter, click on the 'letter' icon (Letter) to see the letter text.

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 (Goto, Care)

Find the care episode you wish to add a note and click on the 'enter' icon (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.

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 'scanned' has already been set up for you. Choose this category when attaching a scanned image as a Note:

A category of 'document' has already been set up for you. Choose this category when attaching a document (e.g. MS Word document) as a Note:

A category of 'SOAP' has already been set up for you. Choose this category if adding a SOAP 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 The care episode reference number will be brought through from the care episode record.

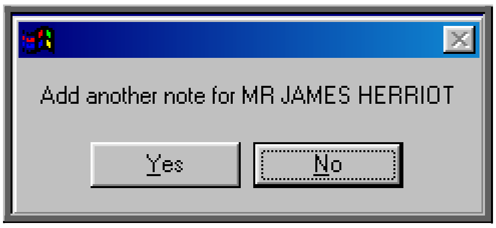
Note Adding a standard Note

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 'Scanned' category

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

Adding a Note using the 'Document' category

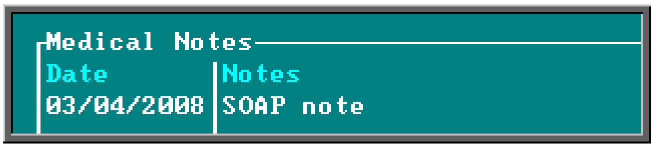
In the *Note* field type the file name (including it's extension) and path of the document file you wish to attach as a Note:

Adding a Note using the 'SOAP' category

Rather than the note text being entered into one *Notes* field, it can be entered over four SOAP note fields (*Subjective, Objective, Action* and *Plan*).

Selecting this category will jump you past the standard *Note* field and into the *Subjective* field. Once the subjective note has been typed, press the **F4** key to move to the *Objective* field. Continue to do this with each field. Press **Ctrl-Enter** when finished.

In the Notes summary table on the Patient screen, the first line of the *Notes* field is shown. As this is empty on a SOAP note, a description of SOAP note is entered here.

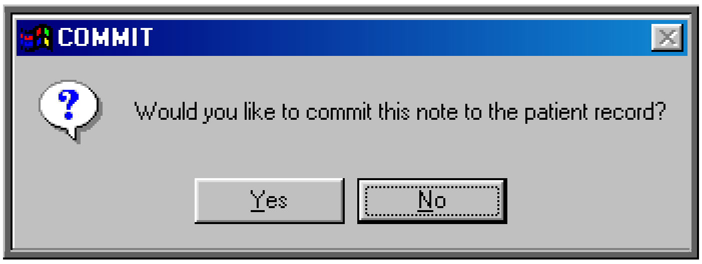


Adding a Note using the 'Temp' category

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.)

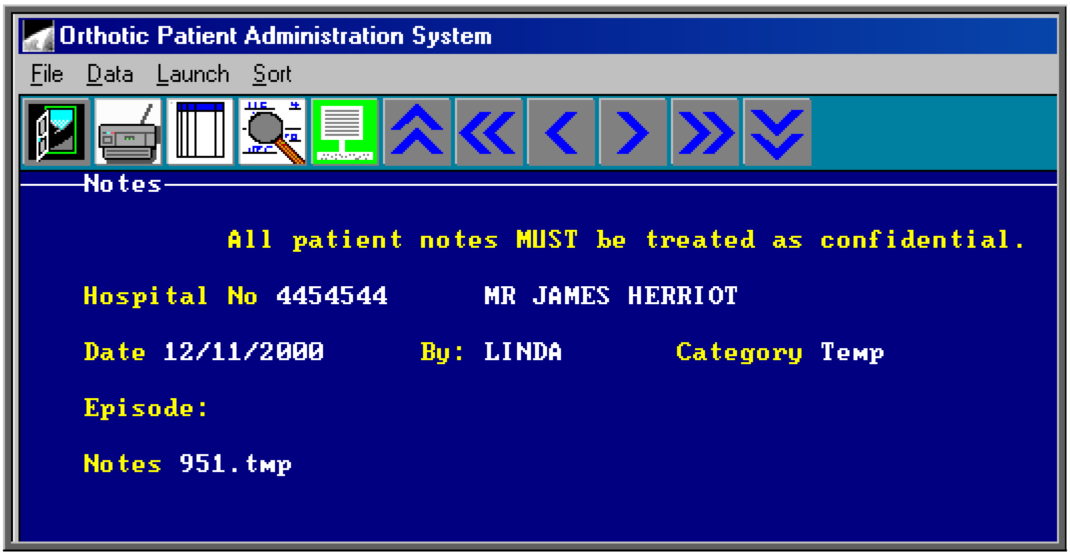
Type in the note, remembering that the first line of the note is shown in the table of medical notes on the patient's screen. Consider making the first line a summary of the content of the Note:

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:

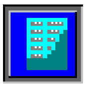
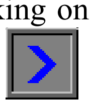


If you select Yes, the text entered in the Text Editor will be copied into the Note field of the note and saved. **You will not be able to edit this note later.**

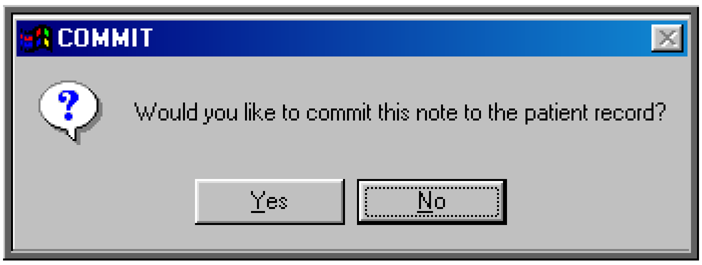
If you select No, the information typed in the Text Editor will be allocated a sequential temporary note number and this number will show in the *Note* field.



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  (Goto, Notes). Use the 'arrow' icon  (F6) to find the note you wish to edit).

Click on the 'launch' icon  (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 its 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).

Adding a Note using the ‘Letter’ category

In the *Note* field press **Ctrl-Enter** to be taken to the Ad hoc letter screen.

Letter:	Select which of the 26 available letter templates is to be used
Copies	Select the number of copies required. This will default to 1 but can be overtyped
para1-para9	Type in the required text in as many of the paragraph sections that are required. Move down the paragraph fields using either the **F4** key or **Down-Arrow** key.

Press **Ctrl-Enter** when finished.

In the Notes summary table on the Patient screen, the first line of the *Notes* field is shown. As this is empty on a Letter note, a description of Ad Hoc letter sent is entered here.

When you are looking at a letter note, click on the ‘letter’ icon  (Letter) to see the letter text.

If you wish to reprint the letter, click on the ‘letter’ icon  (Letter) to see the letter text.

16. Verifying notes

Verifying notes, gives the Orthotist the opportunity to check notes added by other personnel and mark that they are correct.

Anyone needing to verify notes needs to set up a verification password. This should be different to your log-in password and should be kept secure.

a) Creating a verification password

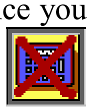
Menu: Utilities – Passwords - Verification

If you do not have a verification password (or if you have forgotten it and the OPAS administrator has reset it) type in your log-in password.

Then you will be asked to type in your new verification password.

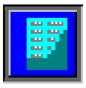
You will be asked to type your new verification password again, before confirming that your password has been stored.

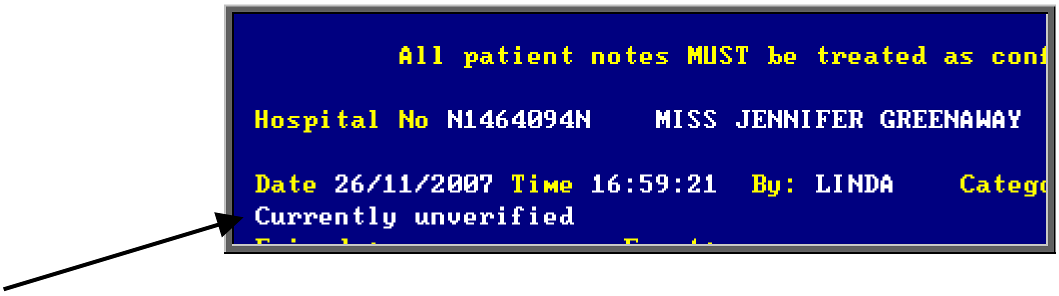
b) Resetting a verification password

<u>No one</u> has the ability to look up a verification password (not even Linda or Martin at Wynnlodge). If somebody forgets their verification password, then a user with administrator access has to reset it so they can go through the steps in (a) again. To reset verification passwords go into Utilities – Users. Once you are looking at the relevant user record, click on the 'cancel verification' icon  (File, Clean_Up, Verification).

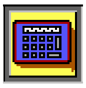
Click on Yes to continue.
You will then be asked to enter your own password, to confirm that you are the administrator.

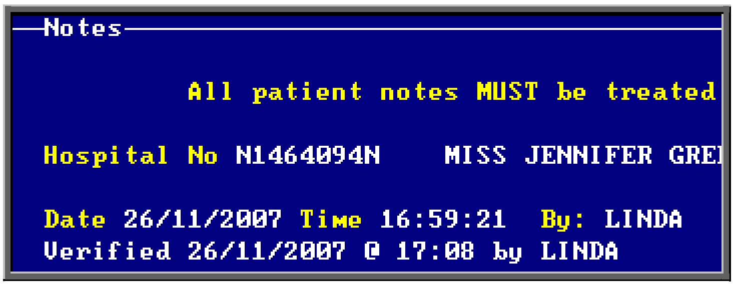
c) Verifying notes

To verify a patient's notes, find the patient record and go to their notes by clicking on the 'notes' icon  (Goto, Notes).



Any notes that have not been verified will show the message 'Currently unverified' underneath the *Date* of the Note:

To verify the note, click on the 'verify' icon  (Verify). You will be asked to type in your Verification password. As soon as you have typed all the characters of your password, the note will be updated with the date, time and name of the verifier. There is no need to press the **Enter** key after the password. If you need to press **Enter** then the password is incorrect and the note will remain unverified.



d) Adding and Verifying notes

If you are set up with a verification password, when you add a note you will have the option after finishing the note to verify the note straight away.

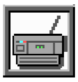
e) Additional information

- Audit notes created by OPAS can not be verified (why would you want to)
- Temporary notes can not be verified until they have been committed

17. Printing medical notes

Menu: Patients

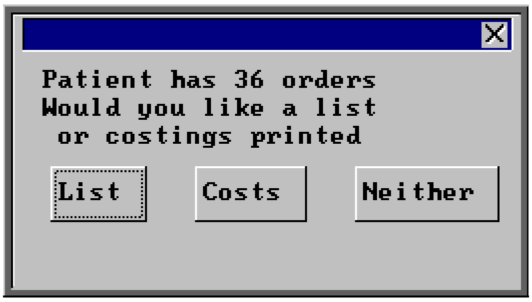
1. Patient demographics

Click on the ‘print’ icon  (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 patient’s 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).

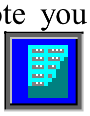
Select which orders report you require or select Neither if you do not require details of the patient's orders.

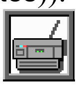
A box will then appear showing how many care episodes the patient has.

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.

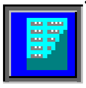
2. Individual notes

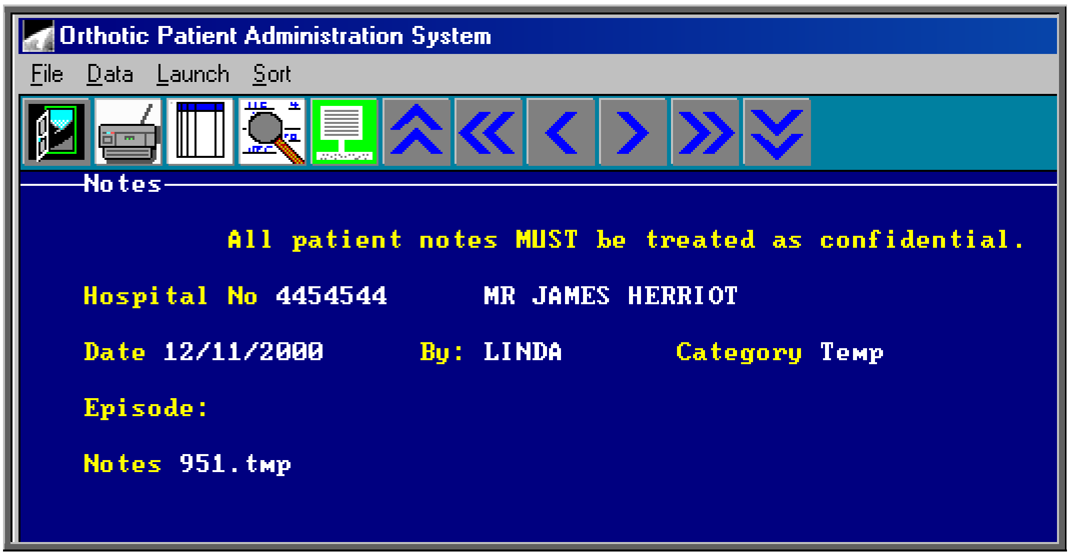
a) General or care episode notes

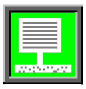
Find the note you wish to print (by finding the patient and clicking on the 'notes' icon  (Goto, Notes)).

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

b) temporary notes

Find the temporary note you wish to print (by finding the patient and clicking on the ‘notes’ icon  (Goto, Notes)).



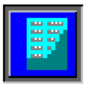
Click on the ‘launch’ icon  (Launch) to be taken to the Text Editor.

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.**

c) Letter notes

Find the letter note you wish to print (by finding the patient and clicking on the ‘notes’ icon  (Goto, Notes)).

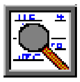
When you are looking at a letter note, click on the ‘letter’ icon  (Letter) to see the letter text.

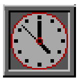
If you wish to reprint the letter, click on the ‘letter’ icon  (Letter) to see the letter text.

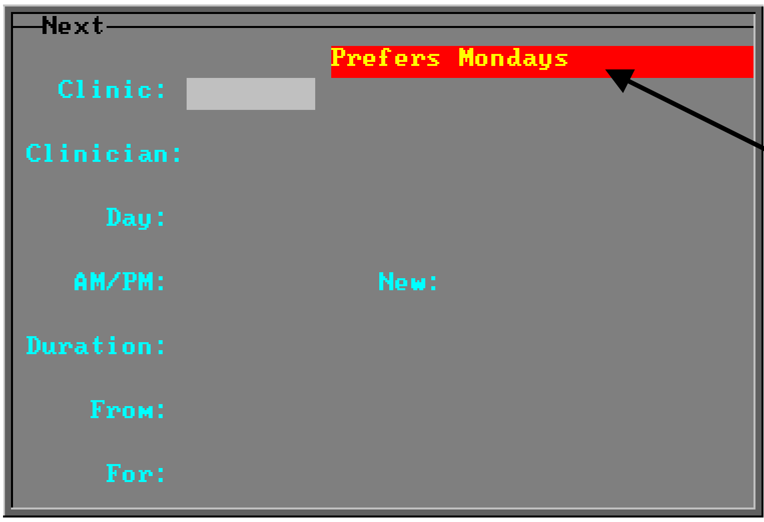
18. Making an appointment

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  (Data, Find).

Click on the 'next appointment' icon  (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, R for review or C for cast

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.

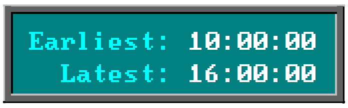
From — will default to tomorrows date but can be changed to the date you wish to start looking for available appointments. This is useful when you wish to make a review appointment some time into the future.

For — enter the reason for the appointment. This will then be put into the *Notes:* field on the new appointment for you.

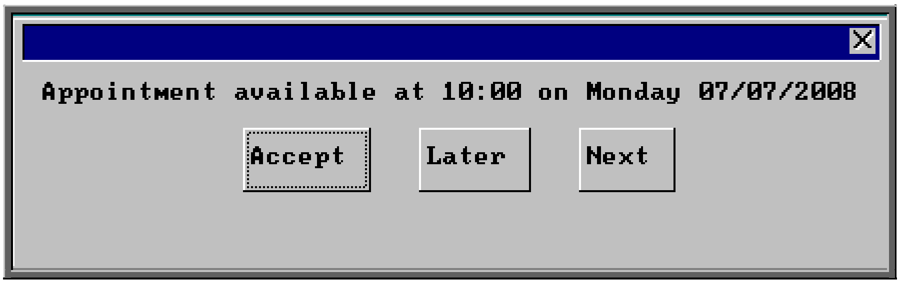
The system will now look for the first available slot from the date selected. If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you need to make another appointment.

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 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.



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 (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 (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 (type N).

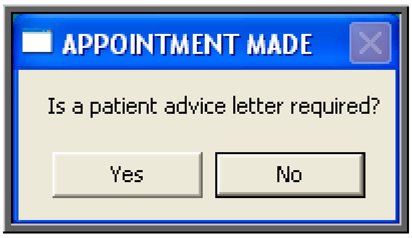
If you wish to abandon finding an appointment press Esc

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

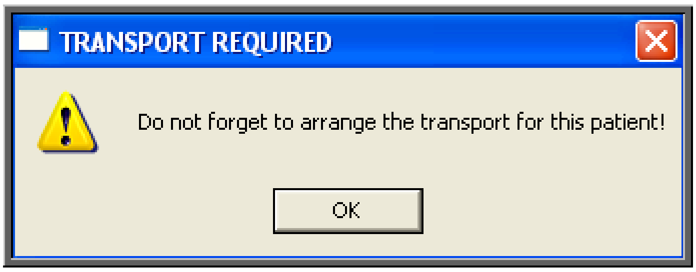
Previous Click on Previous (type P) to go back to the previous date offered.

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

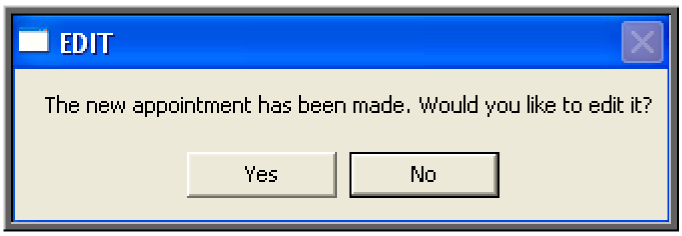
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.



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



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
- to add an event

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.

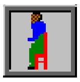
When you have finished editing, press **Ctrl-Enter** to save and return to the patient record.

To learn more about care episodes go to Section 8 – Appointments.

19. Amending an appointment

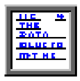
Finding the Appointment to be Amended

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  (Appointments, Current)

2. Appointments – Current – Sessions. Go to the session the appointment is for and click on the 'maintain' icon  (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  (Edit, Update).

The following fields may be updated. Those in red have a pop-up available. Press **Tab** to access the pop-up, if you need to select an alternate option.

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)
Letter	
Type	
New	
Referral	
Referrer	

Purchaser
Notes
Comments
Event
Care Episode
Grade
Priority
Full and *Partial*
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)

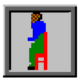
Reminder (entering a date in here will stop a reminder letter being printed – taking the date out will enable the letter to be printed again)

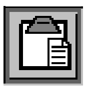
The patient cannot be amended. If you wish to offer the appointment time to another patient, the original appointment should be cancelled, and another one made for the new patient.

20. Cancelling an appointment

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  (Appointments, Current)

a) Appointments – Current – Sessions. Go to the session the appointment is for and click on the 'maintain' icon  (Appointments, Maintain).

b) 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  (Cancel).

2. You will then be asked to enter the reason for cancelling.

3. Type in the reason (leave blank if you wish to) and click on OK to continue. If you wish to abandon cancelling the appointment, click on Cancel.

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.

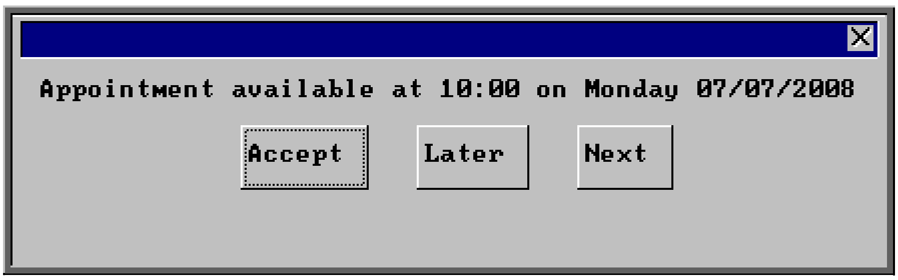
5. If transport was required, you will be told so that the arrangements with the ambulance service can be cancelled.

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 tomorrows 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.



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 (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 (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 (type N).

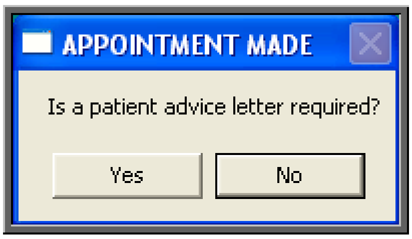
If you wish to abandon finding an appointment press Esc

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

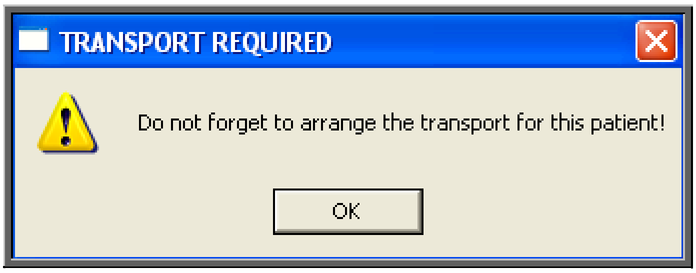
Previous — Click on Previous (type P) to go back to the previous date offered.

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

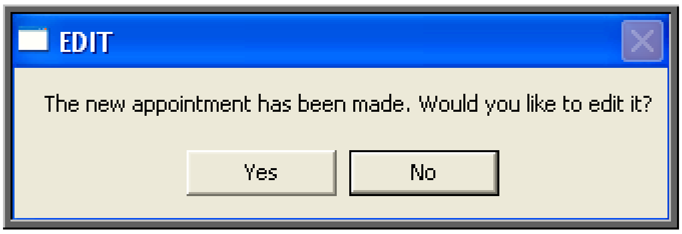
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.



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



You will then be given the opportunity to edit the appointment.

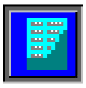


The appointment information that was entered when the original appointment was created will be copied into the new appointment e.g. Notes, Order number etc

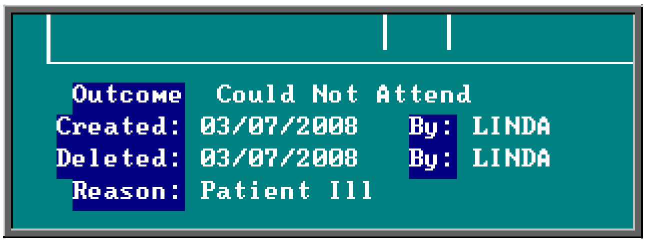
If you do not wish to edit the appointment, click on No. If you do wish to edit the appointment, click on Yes to be taken into the appointments screen, where you can make the necessary alterations.

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

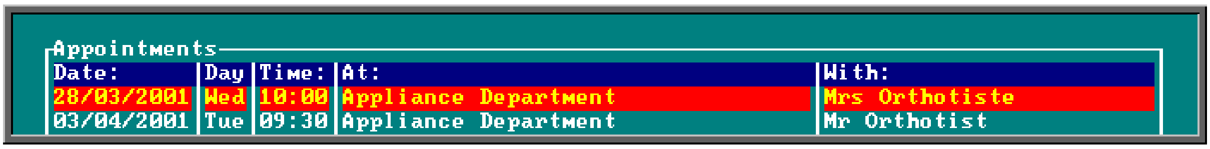
Recording Cancelled Appointments

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  (Goto, Notes)) will show why the appointment was cancelled, by whom and the reason for the original appointment.

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



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



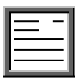
However, whether the parameter is set to Remove or Keep, when an appointment is cancelled, that appointment time becomes available again so that another patient can be offered it. Cancelled appointments will also be taken into the archive when run, so that they can be incorporated into reports.

21. Carbon Copies

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.

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  (Edit, Enter)

To update an existing Contact, find the Contact you wish to change and click on the 'update' icon (Edit, Update).

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

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.

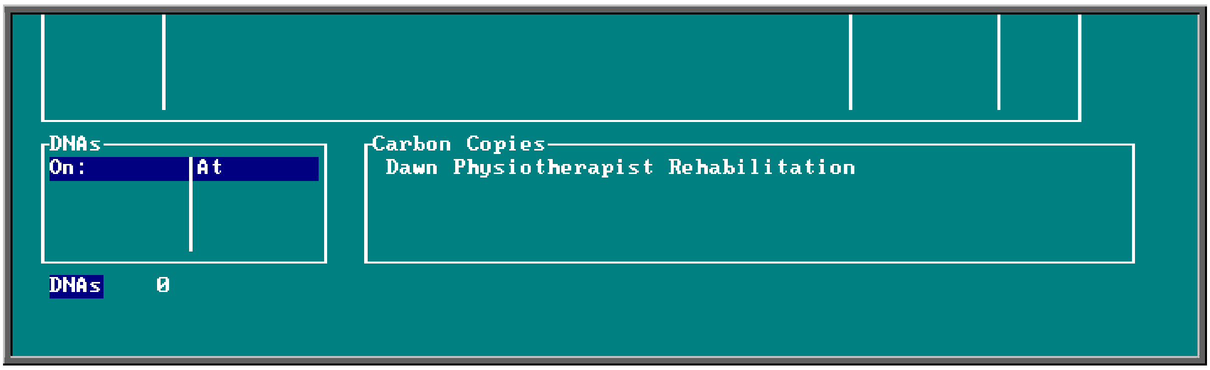
Click on the 'enter' icon (Edit, Enter)

Click on Carboncopy (type **C**)

You will be shown the names you have previously set up in Utilities – Choices – Contacts. Highlight the name required and press **Enter** (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.



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.

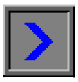
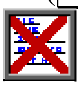
Then use **PgDn** and **PgUp** to scroll up and down the table.

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

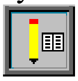
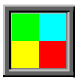
Find the relevant patient.

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

d) Adding the Carbon Copy field to your appointment letters

Menu: Utilities – Choices – Letters.

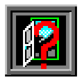
Find the appointment letter(s) that you use by paging down the list of letters. (Most of you will be using LETTERA) Note: the list is in alphabetical order of *Short Name*.

Once you have highlighted the relevant letter click on the 'paper and pencil' icon  (WP) to see the letter. Then click on the 'four coloured squares' icon  (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  (File, Exit), and then click on the 'exit with a question mark' icon  (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.

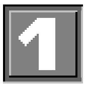
When you print your appointment letters, having gone through the steps above, additional copies of the letter will automatically be printed for each carbon copy recipient, with their name printed at the foot of the copy that is for them. i.e. if a patient has 2 carbon copy recipients on his patient record (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.

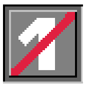
22. This

Menu: Patients

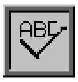
There are occasions when you would want to send a preset letter to just one patient.

Clicking on the 'isolate' icon  (This, Isolate) isolates the patient that you are looking at, so that when you request a letter it will only be produced for 'this' one patient.

To get all your patient records back when you have finished, either click on the

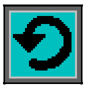
- 'unisolate' icon  (This, Unisolate)

  or

- click on the 'ABC' icon  (Sort, Physical)

Bookmarking

You can manually bookmark a patient at any time by clicking on This, Bookmark at the top of the Patient screen.

When you want to find a patient that you know you have worked on earlier, click on the 'back' icon  (Goto, Bookmark), and you will be presented with a list of patients that you have dealt with and/or manually bookmarked since you logged on .

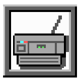
23. Sending patient letters

Menu: Patients

Letters can be produced from the Patients screen using either pre-defined templates or creating one-off letters with personalised text.

a) Using pre-defined templates

While you are in the **Patients** screen, you have the ability to send a preset letter (26 different Patient letters can be set up – see Utilities – Note 23. Choices - Letters) to the patient or their referrer. To do this find the patient that requires a letter and:

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

Select **Letter** from the print menu

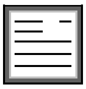
Highlight the PATLET you wish to produce from the list provided

Select the number of copies required

Highlight **Yes** to continue and press **Enter**

b) Creating one-off letters

The note category of **Letter** gives you the ability to send ad hoc (one off) letters to patients or their referrer/GP.

To create an ad hoc letter find the patient that the letter is regarding and click on the 'enter' icon  (Edit, Enter) and select **Notes**.

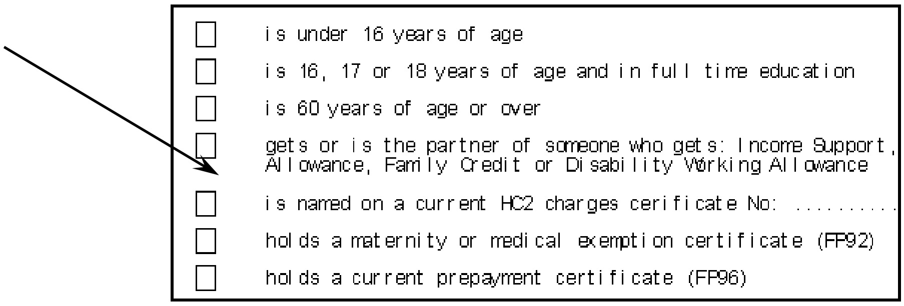
Date	enter the date to appear on the letter (this field will default to today's date)
Category	select **Letter** from the pop-up
Notes	leave the *Notes* field blank and press **Ctrl-Enter**. You will then be taken to the Ad Hoc letter screen.
Letter:	Select which of the 26 available letter templates is to be used
Copies	Select the number of copies required. This will default to 1 but can be overtyped
para1-para9	Type in the required text in as many of the paragraph sections that are required. Move down the paragraph fields using either the **F4** key or **Down-Arrow** key. Press **Ctrl-Enter** when finished.

Whichever way a letter is produced, a log of its creation will be entered into the patient's letter log (Goto, Letters).

24. 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

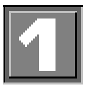


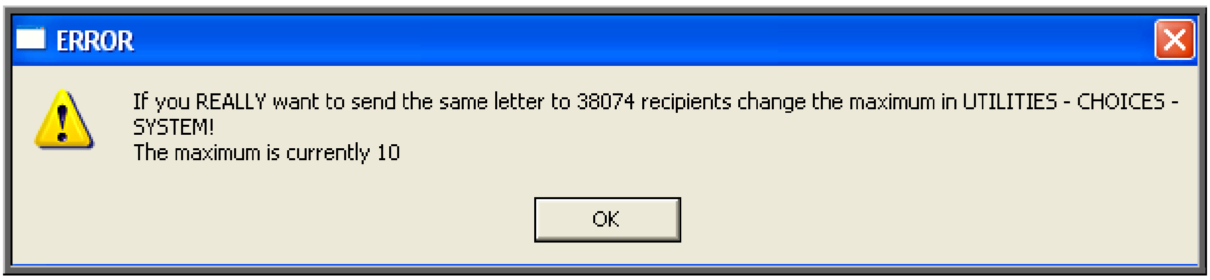
Webdings. If you print the form and get a 'c' where you would expect to see the box, then you have not currently got Webdings on your computer.

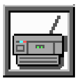
In case you haven't, we have included the font in OPAS and it can be found in q:\opas\font\webdings.ttf. Ask your IT department to copy the font into the location that fonts are held on your computer.

Menu: **Patients**

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

Click on the 'islolate' icon  (This, Isolate) at the top of the screen. If you do not isolate the patient first, OPAS will think you want to send the letter/form to all your patients. Don't worry, there is a safety net in the System parameter screen to set the maximum number of patients allowed on a mail merge and if you did forget to isolate the patient, you would get the following message.



Click on the ‘print’ icon  (File, Print)

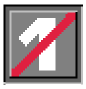
Select Letter

Highlight the form you wish to produce from the list provided

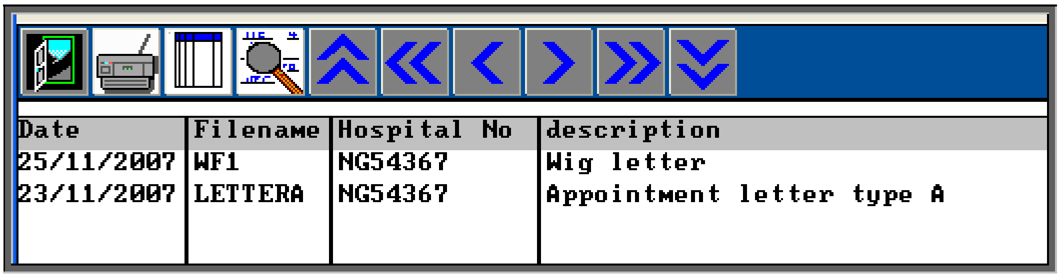
Select the number of copies required

Highlight Yes to continue and press Enter

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

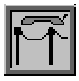
To be able to see all the patient records again click on the ‘unisolate’ icon  (This, Unisolate).

At any time you can look at the patient’s letter log, to find what letters have been sent and when. Simply click on Goto, Letters at the top of the Patient screen.



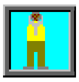
Date	Filename	Hospital No	description
25/11/2007	WF1	NG54367	Wig letter
23/11/2007	LETTERA	NG54367	Appointment letter type A

25. Paslink

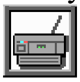
If the hospital has bought some additional software from Wynnlodge Limited called Paslink, this option can be used for downloading patient information from the main hospital database. The option can be selected by clicking on the ‘paslink’ icon  (Paslink). As hospital databases vary, the instructions for using Paslink are site specific and individual instructions will be provided to those hospitals using this.

26. GP

Menu: Patients

By clicking on the 'GP' icon  (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  (File, Print)

Select Letter from the print menu

Highlight the GPLET you wish to produce from the list provided

Select the number of copies required

Highlight Yes to continue and press **Enter**

27. Mobility

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

28. Dormant patients

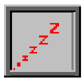
Menu: Patients

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

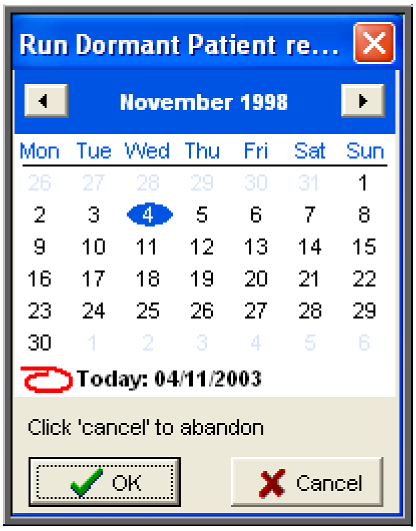
e.g. If your dormant period is set to 3 years and you run dormant patients on the 1 September 2000 it will find all the patients whose last order/appointment was before 1 Sep 1997 **and** those patients that were entered (and therefore have a registered date) before 1 Sep 1997 that have had no orders 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 24. 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  (Dormant).

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



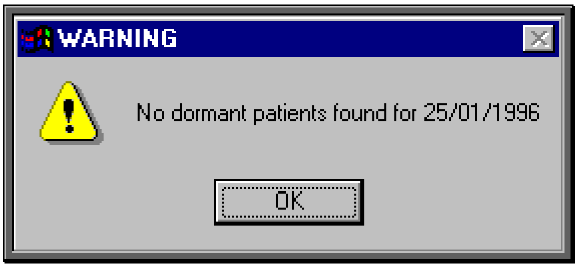
To abandon the Dormant option click on Cancel

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.

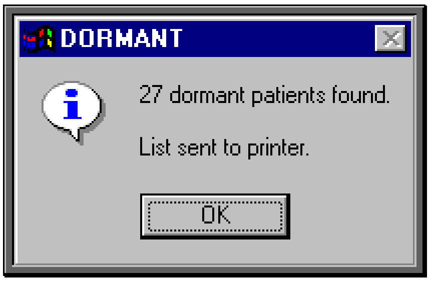
Click on OK.

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 (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 (type Y) and then undelete those patients you do not want to transfer by clicking on the 'delete' icon  (Edit, Delete) 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 (type N). Then mark those patients you do want to transfer by clicking on the 'delete' icon  (Edit, Delete) for each patient you wish to transfer.

Below is an example of the dormant report, which shows the date of the last order and appointment for each patient, or informs you if they haven't had an appointment and/or order.

Dormant patients report printed 05/07/2008
No activity since 05/07/2003

Hospital No	Name	Last Order	Last Appt
1442400	MR ROGER MCCORMICK	NO ORDERS	NO APPTS
G0612265	MH FRUITHOF	NO ORDERS	NO APPTS
G1621310	JC PARKES	NO ORDERS	NO APPTS
N00361807	AARON JONES	NO ORDERS	30/04/2001
N03/00000	KING	NO ORDERS	NO APPTS
N03/KING	KING	NO ORDERS	NO APPTS
N1134939	MRS ANGIE WATTERSON	NO ORDERS	NO APPTS
N123456789	TESSA YOUNG	NO ORDERS	NO APPTS
N123EWQ432	TESSA YOUNG	29/09/2000	NO APPTS
N3243423	MRS JANE BERRY	NO ORDERS	NO APPTS
N34532532432	MRS JILLY COOPERT	06/10/2000	16/10/2000
N345689098	DR JAMES BROWN	04/08/2000	14/08/2000
N353523423	MR JAMIE OLIVER SMITH	NO ORDERS	NO APPTS
N4544	MRS SUSAN NICHOLSON	19/07/2000	11/09/2000

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 26. Ex-patients for more details on Ex-Patients and archiving.

Care Episodes

1. Introduction

A care episode is a means of grouping together orders, notes and appointments that relate to a specific episode of care. Care episodes should be used if you wish to report on:

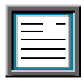
- average costs and appointment time per patient's episode
- time from referral to first appointment
- time from referral to end of treatment

This is because care episodes can track the pathway of the referral right through to the supply of the orthosis.

Care episodes are also used for the gathering of Referral to Treatment (RTT) information as part of the 18 week journey.

2. Adding a care episode

Menu: Patients

Find the patient that you wish to add a care episode for and click on the 'enter' icon  (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. NB. If you are using care episodes to send information to the main hospital system with regards to the 18 week journey, then the case number entered here must be the RTT case number issued at the start of that journey.
Patient:	Hospital No and patient name will be brought through from the patient record.
Objectives:	free text available to outline the objectives of this care episode.
Referral:	date of referral. This will default to today's date, which can be changed or taken out by pressing **F8**.
Assessment:	date of assessment
Fitting:	date of fitting
Discharge:	date of discharge
Consref:	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.
Purchaser:	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.
Clinician:	Clinician 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 Clinicians and make an alternate selection. Otherwise press the **Enter** key to move to the next field.
Orthosis:	select an orthosis code from the pop-up list
Grade:	enter a grade for the episode
Priority:	enter a priority for the episode
Referred:	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)

Diagnose:	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)
Intervention Type:	select the intervention type from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Intervention)
Initiator:	select an initiator from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Initiators)
Primary Source	select the original referrer of the patient from the pop-up list
Primary Date	enter the original referral date
Primary Assessment	enter the date of the assessment made by the original referrer

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.

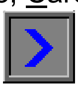
3. Updating a care episode

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

Click on the 'update' icon (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.

The following fields have pop-up lists available, so press the **Tab** key to see the list of available options.

Purchaser:	*Diagnose:*
Referrer:	*Intervention Type:*
Clinician:	*Initiator:*
Orthosis:	*Primary Source*
Referred:	

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.

4. Printing care episode details

Menu: Patients

Find the patient whose care episode you wish to print.

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

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

Two pages will be printed. This first is a summary of the care episode with details of any orders, and the second page contains notes linked to the episode.

Note: If there are no medical notes for the care episode, the second page will not print.

Care Episode Record Case: CE00039

Hospital No: **TORUS44**

MISS TESSA SMITH

213 Prospect Avenue TF10 7JF

Objectives: **Provide better fitting shoes**

Referral Date: **10/03/2003**

Assessment Date:

Fitting Date:

Discharge Date:

No	Dated	Sup	Description	Received	Supplied
MC301107	30/11/2007	078	Made to measure shoes	15/12/2007	

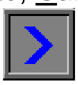
The care report layouts (careform.dfr and careNote:dfr) can be altered to your requirements.

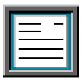
5. Linking records to care episodes

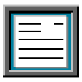
Notes, orders and appointments can be made from the patient record and linked into a care episode by entering the case number into the care episode field on the individual records. It is, however, easier to raise notes, orders and appointments from the Care Episode screen, so the link is made automatically.

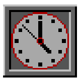
Menu: Patients

Find the patient whose care episode you wish to work on.

Click on the 'care episode' icon  (Goto, Care, Current). If the patient has more than one care episode, use the 'arrow' icon  (F6) to move through the records.

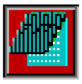
To add a note click on the ‘enter’ icon  (Edit, Enter) and select Notes.

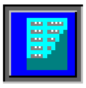
To add an order click on the ‘enter’ icon  (Edit, Enter) and select Order.

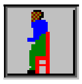
To make an appointment click on the ‘next appointment’ icon  (Appoint).

6. Care Episode jump to’s

From the Care Episode screen, you can look at the orders, notes and appointments in full (like you can from the Patient screen), but you will only see those orders, notes and appointments that relate to the care episode you are looking at.

To look at orders click on the ‘order’ icon  (Goto, History).

To look at notes click on the ‘notes’ icon  (Goto, Notes).

To look at current appointments click on the ‘appointment’ icon  (Goto, Appointments, Current).

To look at archived appointments click on Goto, Appointments, Current.

From the Appointment and Order screen, you can jump to the associated care episode using the ‘care episode’ icon  (Goto, Care).

7. Discharging care episodes

Once a care episode is complete the *Discharge:* date field should be updated.

a) Manual Discharge

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

Click on the 'update' icon (Edit, Update), move to the *Discharge:* field and enter the discharge date. If you wish to enter today's date press the **F2** key.

Press **Ctrl-Enter** to save the changes.

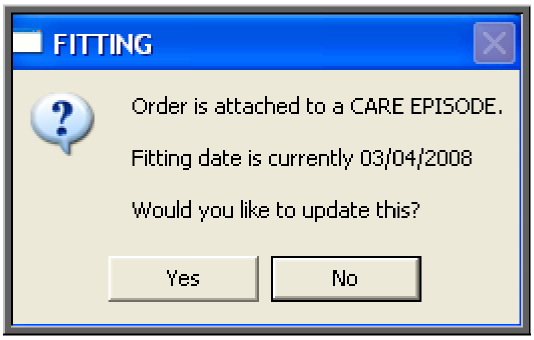
b) Discharge on Supply

Menu: **History – Orders**

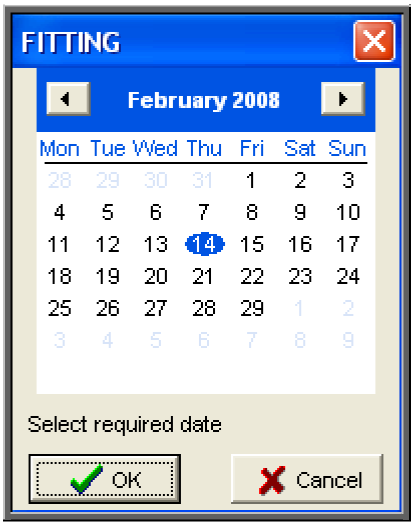
Find the relevant order and then click on the word Goods at the top of the screen, and then select Supply from the drop down menu.

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

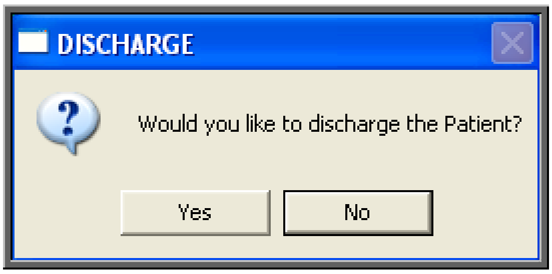
If the order is linked to a care episode, you will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



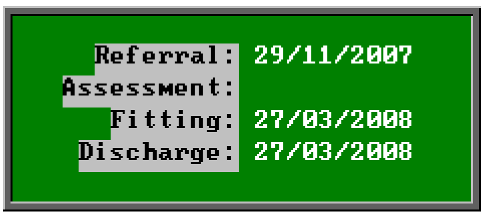
If you choose to update the fitting field, the calendar prompt will appear, so that a date can be selected. The calendar will default to today's date.



You then have the option to discharge the patient.



If Yes is selected, then the fitting date selected will also be entered into the *Discharge:* field on the care episode.

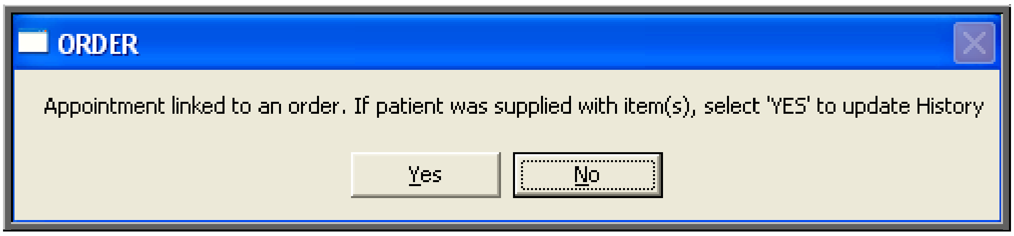


c) Discharge by Attendance

Menu: Appointments – Current – Sessions or

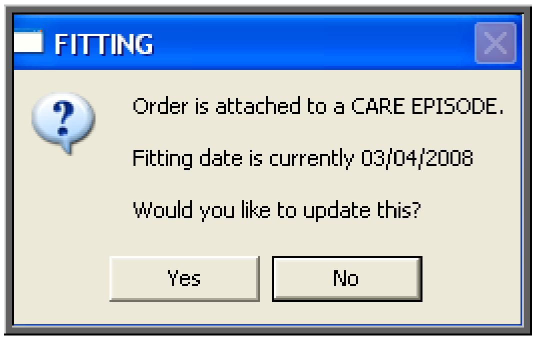
Menu: Patients

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.

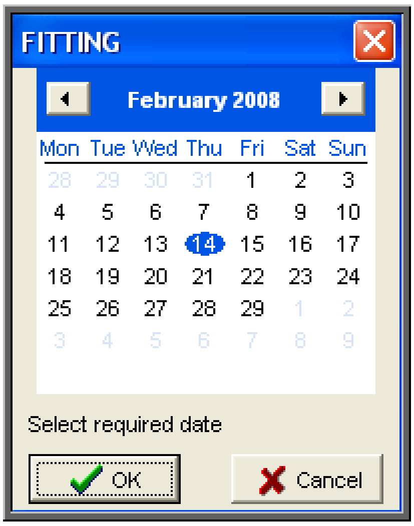


If Yes is selected and the order is attached to a care episode, you will then be asked whether you would like to update the *Fitting:* field on the care episode.

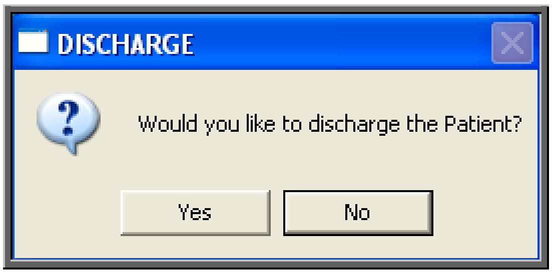
You will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



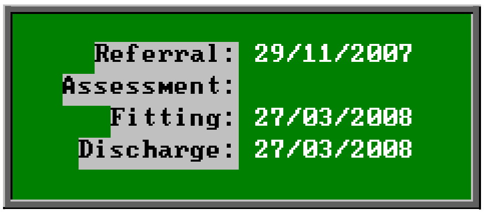
If you choose to update the fitting field, the calendar prompt will appear, so that a date can be selected. The calendar will default to the date of the appointment that has just been marked as Attended.



You then have the option to discharge the patient.



If Yes is selected, then the fitting date selected will also be entered into the *Discharge:* field on the care episode.



d) Discharged care episodes

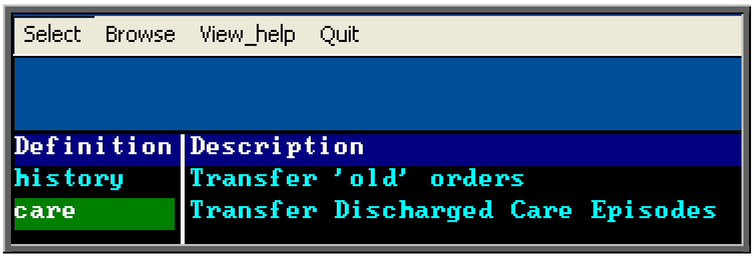
Once a care episode is updated as discharged, the Care Episode banner will disappear from the Patient screen as it is no longer active, but it will stay as a Current care episode until it is archived.

8. Archiving care episodes

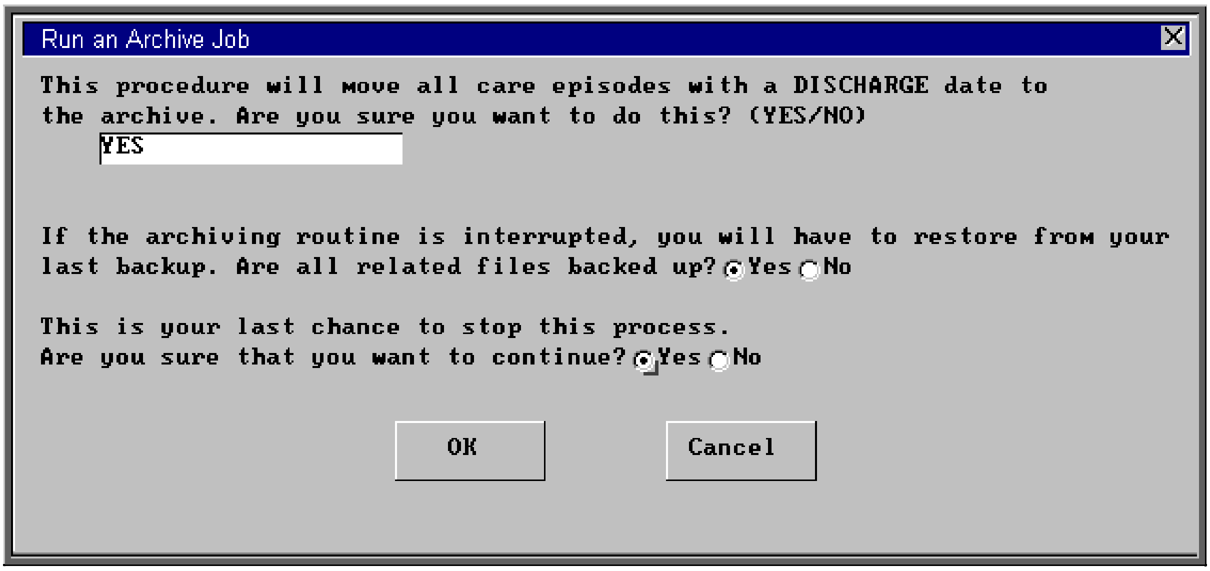
To move discharged care episodes into the archive and aid with reporting, the care episode archive should be run on a regular (e.g. monthly) basis.

Menu: History – Archive – Run

From this screen, options are available for archiving orders and care episodes.



Ensure the care definition is highlighted and click on 'select' at the top of the screen.

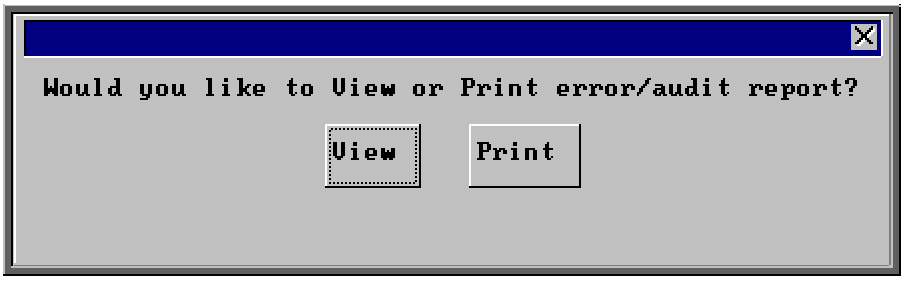


OPAS needs confirmation that you definitely want to archive the discharged care episodes.

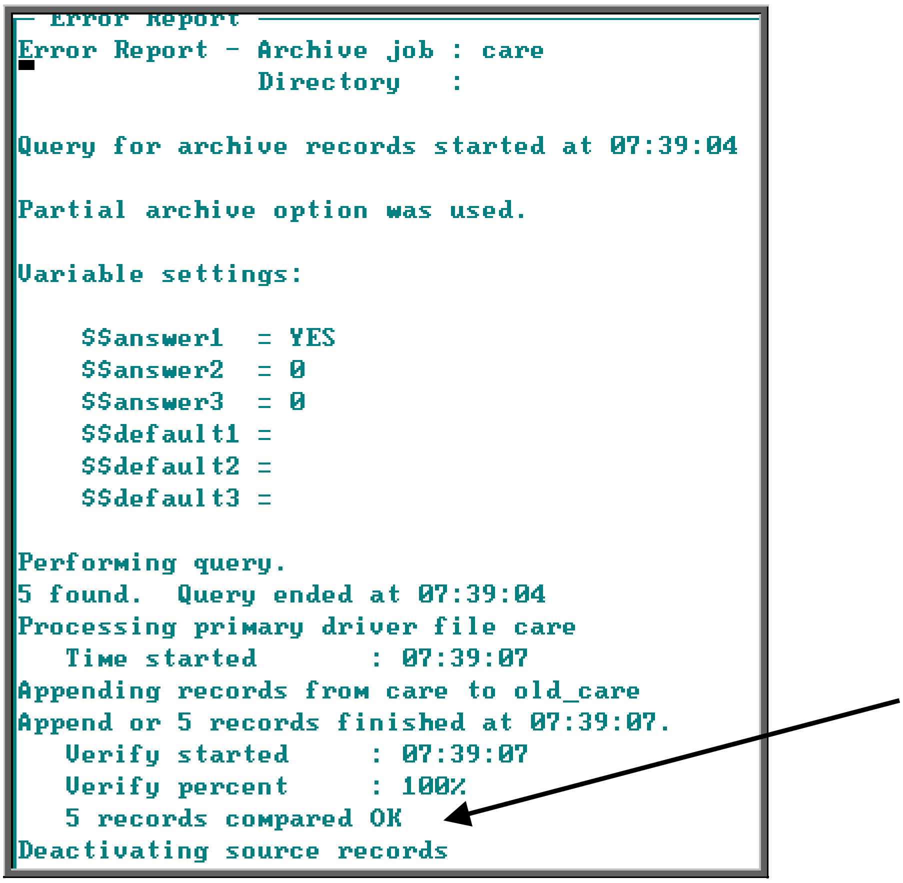
- Type YES into the first question box if you wish to continue
- Confirm that OPAS is backed up (if you are not sure, check with your IT department), by clicking with the mouse on the Yes button
- Confirm that you wish to continue by clicking with the mouse on the Yes button

Click on OK if you still wish to continue.

Once the query has performed, you will be asked if you wish to print or view the audit report. The report is generated automatically, but serves little purpose other than to show how many care episodes were archived.



Click on View if you wish to avoid wasting paper. Do not worry that the header says Error Report as long as the bottom section reports that the 'records compared OK'.

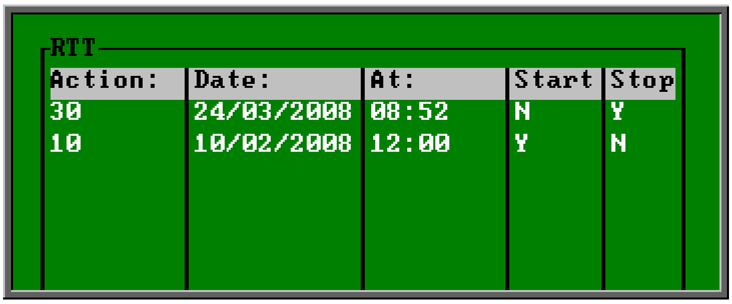


Press **Esc** to clear the report from the screen.

9. 18 Week Journey

As Care Episodes are used to track a patient's episode, it is natural that this is where the Referral to Treatment (RTT) is monitored.

On the Care Episode screen, there is a table at the bottom to show any RTT actions.



RTT

Action:	Date:	At:	Start	Stop
30	24/03/2008	08:52	N	Y
10	10/02/2008	12:00	Y	N

The NHS defined RTT codes have been entered into OPAS. However, if your Trust has any additional codes, these can be added by going into Utilities – Choices – Appointments – RTT Status.

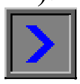
These codes (within the RTT table) are used to track your element of the 18 week journey.

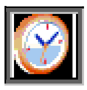
There are a number of ways in which the tracking of the 18 week journey can be carried out.

a) Manually

Menu: Patients

Find the patient whose care episode you wish to update.

Click on the 'care episode' icon  (Goto, Care, Current). If the patient has more than one care episode, use the 'arrow' icon  (F6) to find the relevant care episode.

Click on the 'RTT clock' icon  (RTT) and selecting the action from he pop-up list provided.

b) Using Events

Events are used in appointments to categorise the type of appointment.

Against each Event, an RTT action can be assigned against the attendance of the appointment (*RTT:* field) and the non-attendance of the appointment (*DNA:* field).

You can set up as many event/RTT links as you need.

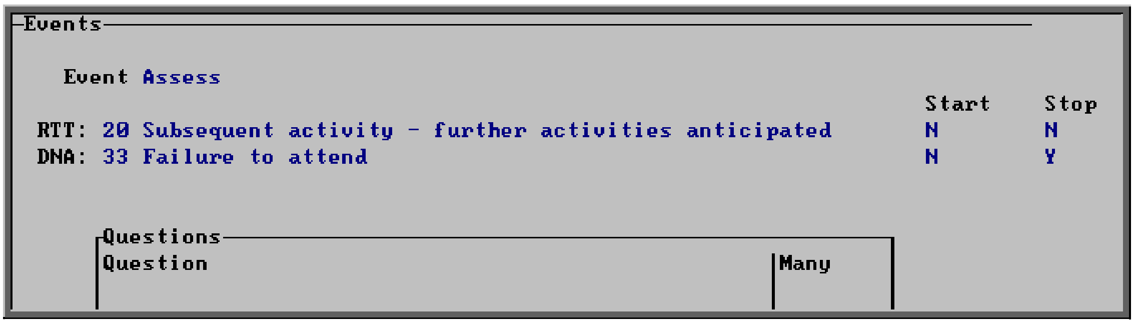
Menu: Utilities – Choices – Appointments – Events

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

Event enter the name of the event

RTT: select the appropriate RTT action for the attendance of this type of appointment from the pop-up list provided

DNA: select the appropriate RTT action for the non-attendance of this type of appointment from the pop-up list provided



An example would be to create an event called 'Assess' and attach RTT codes 20 and 33 against it (see above).

This would then mean that if an appointment

- was linked to a Care Episode
- had an event of 'Assess'
- *Outcome* field updated to Attended

the RTT table would be updated with a code 20

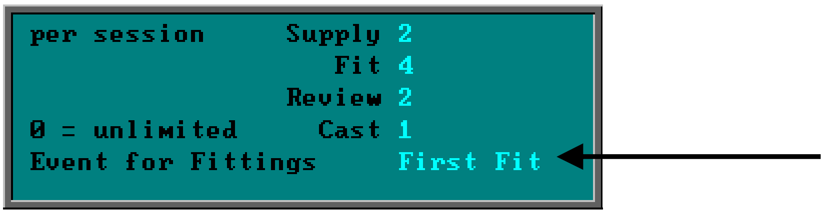
or if an appointment

- was linked to a Care Episode
- had an event of ‘Assess’
- *Outcome* field updated to Did not Attend

the RTT table would be updated with a code 33 (unless the patient was a child).

Another example would be to create an event called ‘First Fit’ that would stop the clock if they attended.

To ensure that fitting appointments made from the Order screen are marked automatically with the relevant event, set your System parameter screen (Utilities – Choices – System) appropriately.



b) Automatic updates

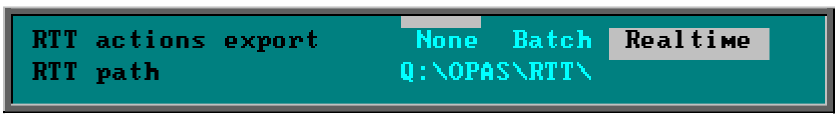
Some actions within OPAS will automatically create an RTT action in the care episode for you.

Enter a new care episode – Code 10

DNA an appt for a child – Code 12

c) Feeds

If you need RTT information to be transferred from OPAS into other hospital software, ask your IT department to contact the OPAS helpdesk. OPAS can send the data in Batch (e.g. overnight) or in Realtime (as the information is being produced). The System parameter screen should be set accordingly.

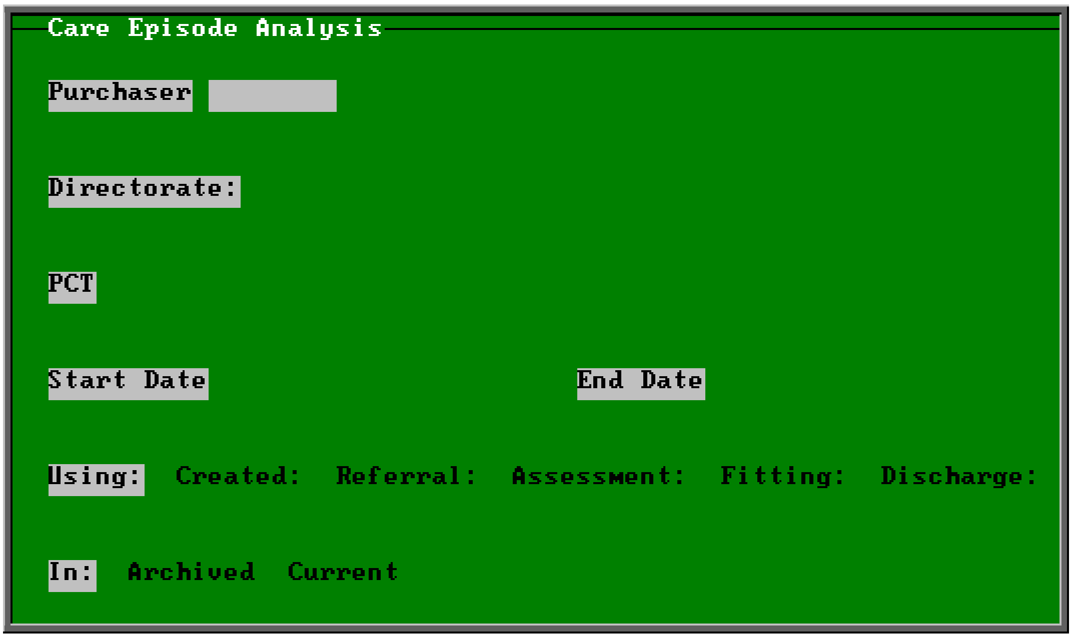


10. Reports

a) Analysis

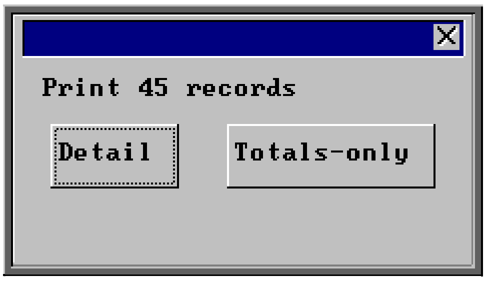
This report can be used to interrogate either current or archived care episodes. Separate report definitions are used, so you can have different layouts for your archived and current care episode reports.

Menu: Reports – Care Episodes – Analysis

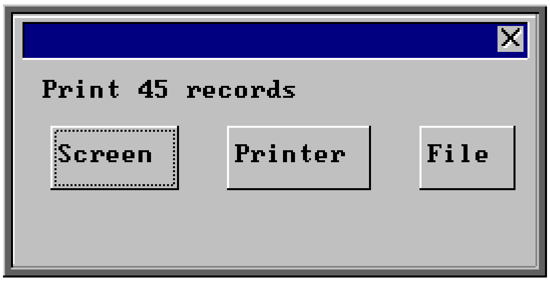


- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the Directorate: required from the pop-up list to find all those patients which belong to that directorate. 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
- select the PCT required from the pop-up list to find all those patients which belong to that PCT. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs 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 whether the date range selected should look at the care episodes Created, Referral, Assessment, Fitting or Discharge date
- select whether you want to interrogate Current or Archived care episodes



You will be shown how many care episodes OPAS has found and ask if you want to see the information in Detail i.e. a line for each waiting list entry or just Totals-only



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.

Below is an example of the **Analysis** report selecting **Detail.**

Hospital No	Patient	Appoints	Time	Orders	Net :	Gross:
NAH280965	MR JAMES BROWN	0	0:00	1	64.00	64.00
12345QWERTY	MR KELVIN BLOGGS	10	1:45	1	123.45	145.05
NTEMP000010	MR MARTIN CRAVEN	1	0:15	1	220.00	220.00
NDR543387	MR GEORGE SMITH	1	0:15	1	197.00	231.48
8776877	Mr Sylvester Stalone	2	0:00	3	168.95	198.51

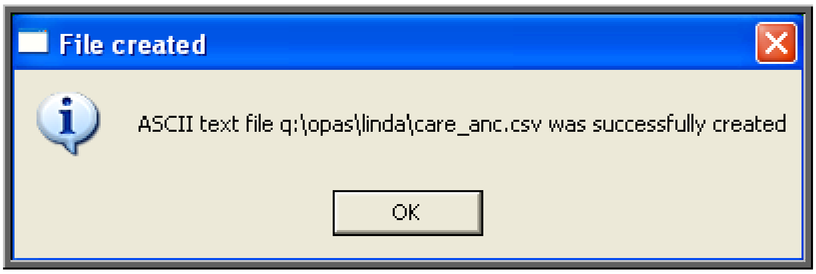
Page 1 dated 17/06/2008
Printed by LINDA
care_ana.dfr - Archived Care Episodes

The footer in the bottom left corner of the report will indicate whether the report is on current or archived care episodes

The report layouts (care_ana.dfr and care_anc.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

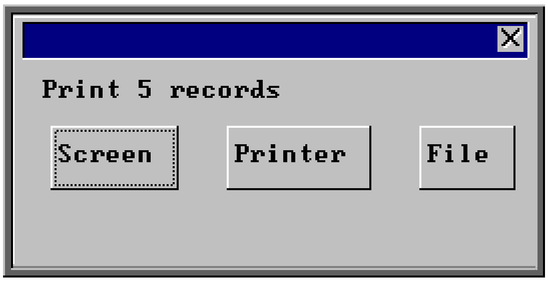
A comma separated variable file will be created called care_anc.csv if analysing current care episodes and care_ana.csv for the archived care episodes. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



b) Current

This report interrogates your current care episodes and finds those that are still active (i.e. there is no date of discharge entered).

Menu: **Reports – Care Episodes – Current**



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.

Below is an example of the Current report.

Case :	Hospital No	Patient	Referral :	Assessment :	Target Date :	Weeks wait to date
CE00049	NQWE345768	MR JOHN SMYTHE	13/01/2008		18/05/2008	3
CE00051	67567	Mr Phil Oakey	13/01/2008	04/02/2008	18/05/2008	3
CE00050	432523	Mr John Brown	13/01/2008		18/05/2008	3
CE00052	NAH280965	MR JAMES BROWN	04/02/2008		09/06/2008	0
	Total for NHS TRUST	13				
CE00011	NTEMP000009	MS MARY LITTLE	02/09/1999		06/01/2000	440
CE00015	NQ123432	MR TONY JACK	20/12/1999		24/04/2000	424
CE00022	NA61848	MR PAUL LAKE	31/05/2000		04/10/2000	401
	Total for Primary Care Group	3				

The report layout (care.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

Waiting List

1. **Introduction**
2. **Setting Waiting List parameters**
3. **Adding a patient to the Waiting List**
4. **Printing letters**
5. **Viewing the Waiting List**
6. **Making appointments**
7. **Linking the Waiting List to a Care Episode**
8. **Taking patients off the Waiting List**
9. **Archiving the Waiting List**
10. **Waiting List reports**

1. Introduction

The Waiting List gives the ability to track patients that you are not able to offer appointments to on receiving their referral. Adding a patient to the waiting list enables you to see how long they have been waiting, and to be able to allocate appointments on a priority or time waiting basis. Reports will help to show how long your patients have had to wait.

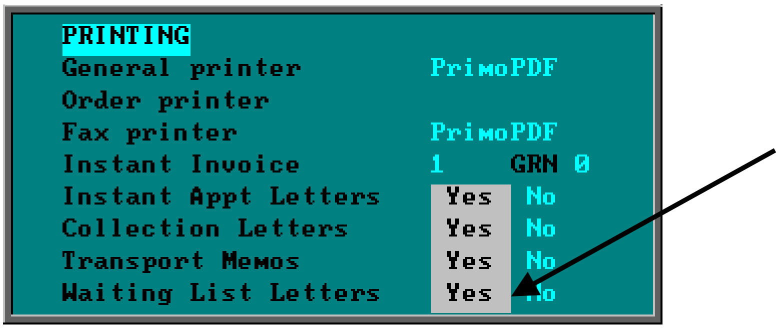
2. Setting Waiting List parameters

There are a number of parameters that will control how your waiting list is managed. It is important to spend some time deciding how you want the waiting list to work, so that these are set correctly..

a) Sending letters

Letters to be sent to patients on the waiting list can be printed in batch or as patients are added to the waiting list. If you wish to be prompted to send a letter each time a patient is added to the waiting list

then go to Utilities – Choices – System, and within the Printing section select Yes against Waiting List Letters.



b) Removing patients from the list

Patients can be removed from the waiting list when an appointment is made **or** when they have attended their appointment.

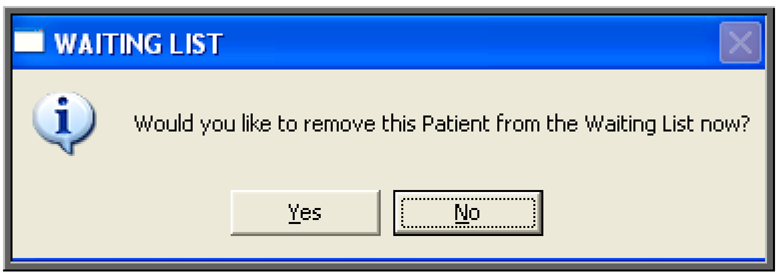
Menu: Utilities – Choices – System

Within the Appointment section of this screen select the appropriate setting.

c) Patients not attending their appointment

If the parameter above is set to Attended, then you have 3 options in regards to DNAs.

Ask If a an appointment that is linked to the waiting list is marked as Did Not Attend, and a further appointment is not made, you will be asked if you wish to remove the patient from the waiting list.



Yes If a an appointment that is linked to the waiting list is marked as Did Not Attend, and a further appointment is not made, the patient will be removed from the waiting list.

No If a an appointment that is linked to the waiting list is marked as Did Not Attend, the patient will **not** be removed from the waiting list.

Menu: Utilities – Choices – System

Within the Appointment section of this screen select the appropriate setting.

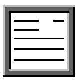
d) Setting priorities

When a patient is added to the waiting list, a priority can be assigned using the *Type:* field.). We have set up three for you, but these can be amended or additional types added. The three already set up are:

Urgent	with a priority weighting of 5
Soon	with a priority weighting or 3
Routine	with a priority weighting of 1

Each person on the waiting list is given a Priority score, which is calculated by multiplying the number of days they have been on the waiting list by the weighting of the *Type:* that they were given when added to the waiting list. This works by multiplying the weighting of the *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). Therefore, the higher the weighting, the faster their score will increase.

Menu: Utilities – Choices – Appointments – Wait Types

To add a new Wait Type, click on the 'enter' icon  (Edit, Enter).

Type enter the wait type description

Weighting enter the priority weighting. Each wait type has a weighting assigned to it, which is used to calculate the score given to a patient on the waiting list.

3. Adding a patient to the Waiting List

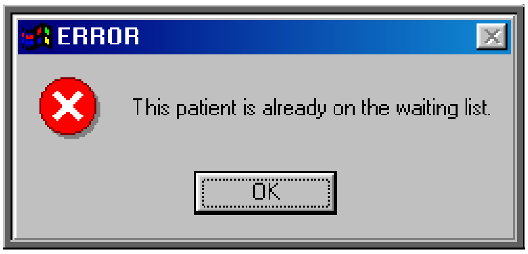
Menu: Patients

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

Click on the ‘enter’ icon (Edit, Enter).

Click on Waiting List (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.

Referral Date: enter the date of referral. The field will default to today’s date but this can be overtyped.

Type: select from the pop-up list by highlighting the required type and pressing the **Enter** key or by double clicking on it with the mouse.

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.

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

Purchaser 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.

Referrer: 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 purchasers and make an alternate selection. Otherwise press the **Enter** key to move to the next field.

Venue: select a venue from the pop-up list. Otherwise press the **Enter** key to move to the next field.

Clinician select a clinician from the pop-up list. Otherwise press the **Enter** key to move to the next field.

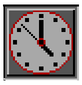
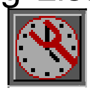
Length The length of appointment can be entered here. This is to assist when making an appointment.

APE Whether the patient requires an **A**M, **P**M or **E**vening appointment can be entered here.

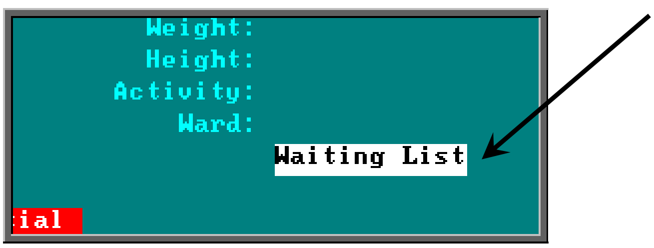
Service Service will be brought through from the patient record but it can be changed to another service as long as it is a service that is assigned to the patient on the Patient screen.

Tagged this option allows a waiting list entry to be tagged. Primarily this is to enable batch printing of waiting list letters.

Order No an order number can be selected from the pop-up list.

If an appointment is subsequently made from the Waiting List screen using the ‘clock’ icon  (Appoint, Next) or the ‘autoclock’ icon  (Appoint, Quick), the fields in **red** are used.

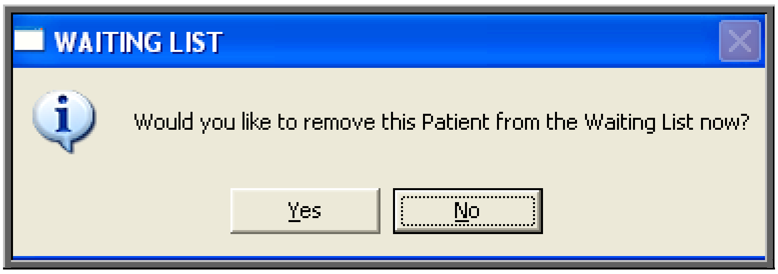
When a patient has been added to the waiting list a flag will appear on the patient record to show that they are on the waiting list. This flag will disappear once they have been removed from the list.



4. Printing letters

a) Printing Letters as patients are added to the waiting list

If in the system parameter screen Instant Print Waiting List Letters is set to Yes, after adding a patient to the waiting list, you will be asked if you would like to print a waiting list letter.



If Yes is selected, you will be taken to the letter screen where you can select which letter you want to send and how many copies.

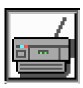
There are twenty-six waiting list letter templates available for printing from the Waiting List screen. These templates can be found in Utilities – Choices – Letters and are named WAITLSTA though to WAITLSTZ.

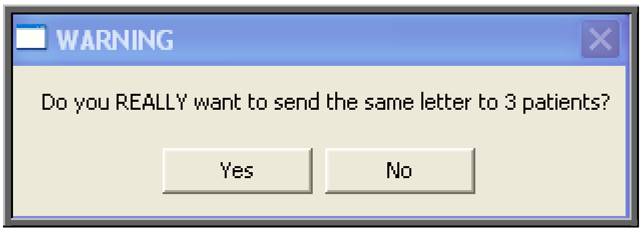
b) Printing initial waiting list letters in batch

You may prefer to print your letters in batch, rather than individually. If this is the case, then as you complete the Waiting List screen enter **'Y'** in the *Tagged:* field.

Once you are ready to print your batch of letters, go to Waiting List – Current.

Select the option Tagged. This will give you all the patients on the waiting list that have a '**Y**' in the *Tagged* field.

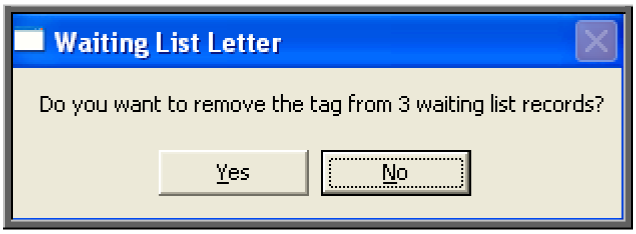
Once in the Waiting List screen, click on the 'printer' icon  (File, Print) and select Letters. You will be asked to confirm that you wish to send the same letter to all your tagged patients.



If Yes is selected, you will be taken to the letter screen where you can select which letter you want to send and how many copies.

There are twenty-six waiting list letter templates available for printing from the Waiting List screen. These templates can be found in Utilities – Choices – Letters and are named WAITLSTA though to WAITLSTZ.

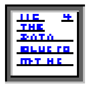
Once the letters are printed, you will be asked if you would like the '**Y**' removed from the *Tagged* field so they don't come up for printing next time.



c) Printing follow-up waiting list letters in batch

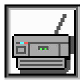
Once a patient has been on the waiting list for some time, you may wish to send another letter. This can be done in a couple of ways.

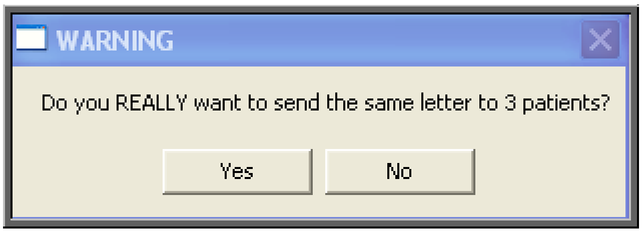
1) By tagging

Patients can be tagged at any time by entering **'Y'** in the *Tagged:* field of the waiting list record. This can be done by clicking on the 'update icon  (Edit, Update) or more quickly by clicking on Tag, This at the top of the screen.

Once you are ready to print your batch of letters, go to Waiting List – Current.

Select the option Tagged. This will give you all the patients on the waiting list that have a '**Y**' in the *Tagged* field.

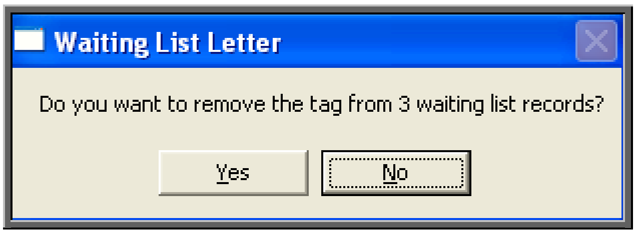
Once in the Waiting List screen, click on the 'printer' icon  (File, Print) and select Letters. You will be asked to confirm that you wish to send the same letter to all your tagged patients.



If Yes is selected, you will be taken to the letter screen where you can select which letter you want to send and how many copies.

There are twenty-six waiting list letter templates available for printing from the Waiting List screen. These templates can be found in Utilities – Choices – Letters and are named WAITLSTA though to WAITLSTZ.

Once the letters are printed, you will be asked if you would like the '**Y**' removed from the *Tagged* field so they don't come up for printing next time.



2) Isolating records by viewing the waiting list

An example of this would be to find all those patients that have been on the waiting some time.

Menu: Waiting List – Current

Select Date Added and use the Start and End date prompts to find those patients that have been on the waiting list x number of weeks.

Once you are looking at these records, you can either

- tag them all by clicking on Tag, All at the top of the screen and choose to print them on another occasion through the Tagged option

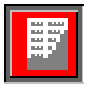
  or

- print them straight away by clicking on Letters at the top of the screen where you will be taken to the letter screen and you can select which letter you want to send and how many copies.

5. Viewing the Waiting List

a) Viewing an individual patients waiting list record

Menu: Patients

Find the relevant patient records and click on the 'waiting list' icon  (Goto, Waiting List, Current).

b) Viewing the entire waiting list

Menu: Waiting List – Current

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 – Appointments – 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 *Priority* value. Therefore, the first person you will see on entering the screen will be the most urgent Urgent!

When choosing this option, you are given the ability to look at those patients added for a specific urgency. A list of your types will appear for you to choose from. If all the types are required, press the **Enter** key twice.

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.

When choosing this option, you are given the ability to look at those patients added for an orthosis. A list of your orthosis codes will appear for you to choose from. If all the orthosis codes are required, press the **Enter** key twice.

Purchaser

The patients will be shown in Purchaser order. This is particularly useful where more than one hospital is using the Waiting List.

When choosing this option, you are given the ability to look at those patients added for a specific purchaser. A list of your purchasers will appear for you to choose from. If all the purchasers are required, press the **Enter** key twice.

Service

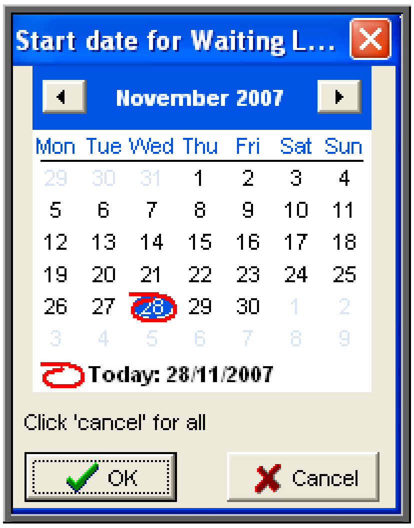
This shows the patients in order of their service.

A list of your services will appear for you to choose from. If all the services are required, press the **Enter** key twice.

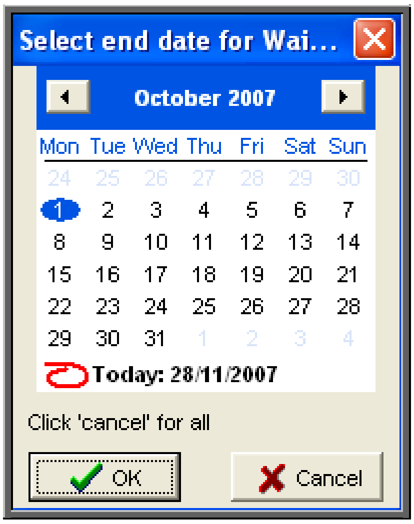
Date Added

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.

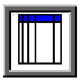
When choosing this option, you are given the ability to look at those patients added between a specific date range.

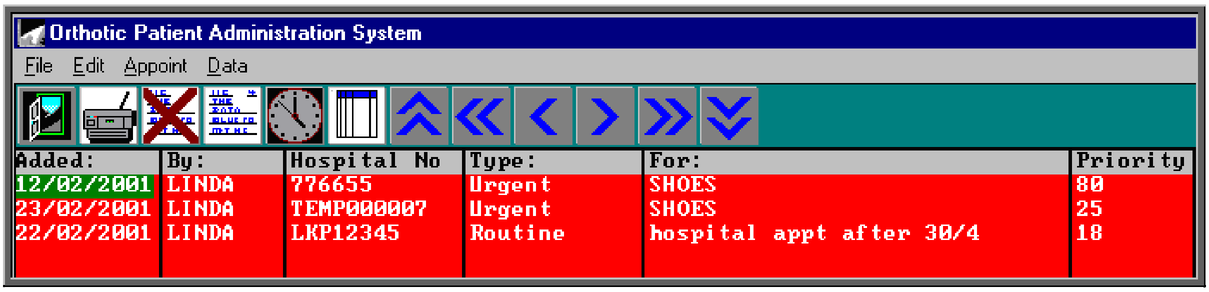


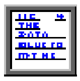
Using the calendar prompt, select the start date of the range to be found and click on OK. If you wish to see the whole waiting list in date added order, click on Cancel.



On the second calendar prompt, select the end date of the range to be found and click on OK.
The Waiting List screen will now be showing all the patients that have been added to the waiting list within the date range selected. This function is particularly useful when wanting to send a follow up letter to all those patients that have been waiting a specified period. If a letter was required at this point, simply click on the 'printer' icon  (File, Print) and select Letters.

Whichever way you decide to enter the waiting list, the patients can be seen as a list by clicking on the 'browse' icon  (Data, Browse).



If you wish change or enter more information, click on the 'update' icon  (Edit, Update).

The following fields have pop-up lists available, so press the **Tab** key to see the list of available options.

Type:	*Referrer:*
For:	*Venue:*
Orthosis Code:	*Clinician:*
Purchaser:	*Order No*

Press **Ctrl-Enter** to save the changes made.

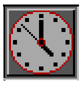
The following fields can not be amended. Information is entered in these fields automatically when certain actions are carried out to the waiting list.

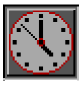
Appointment:	*By*
Removed:	*Reason:*

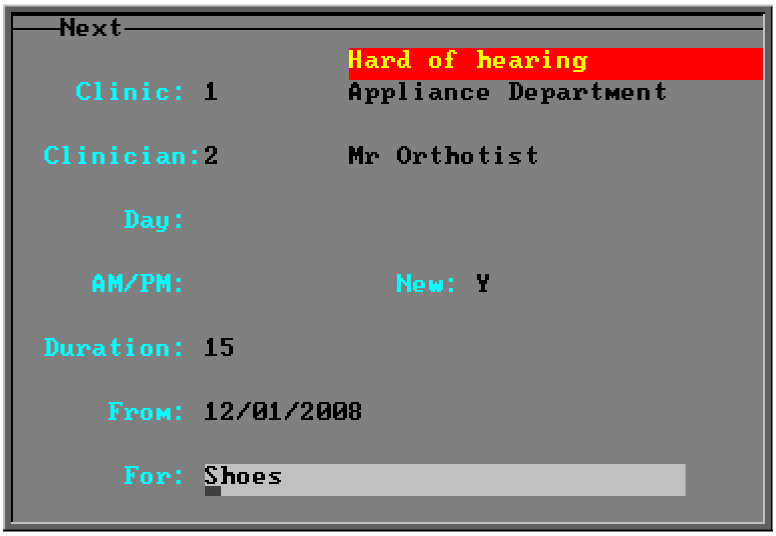
6. Making appointments

Appointments can be made for patients on the waiting list using any of the available methods. If you are using care episodes and need to link the appointment to both the waiting list and the care episode, then the appointment must be made from the Waiting List screen.

a) Making appointments from the Waiting List screen

There are 2 'clock' icons on the waiting list screen,  and  .

a) The first 'clock' icon  (Appoint, Next) will take you to the Next appointment selection screen.



Complete the screen in the usual way (see Patients - Note 18. Making an appointment). However if you have entered the *Venue:*, *Clinician:*, *APE*, *New, Length:* and/or *For:* fields on the Waiting List screen, these fields will automatically flow through into this screen as you enter through each field, saving time on rekeying.

b) The 'autoclock' icon  (Appoint, Quick) can be used if the *Venue:* field has been completed on the Waiting List screen. The 'autoclock' option bypasses the Next selection screen and makes an appointment based on the information on the Waiting List screen (i.e. *Clinician:*, *APE*, *New*, *Length*: and *For:* fields).

When using the ‘autoclock’ option, OPAS will start looking for the next appointment after the number of days delay set in the System parameter screen. (see below)

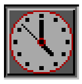
And if the *Length* field has not been completed on the Waiting List screen OPAS will take your default appointment time from the System parameter screen. (see above)

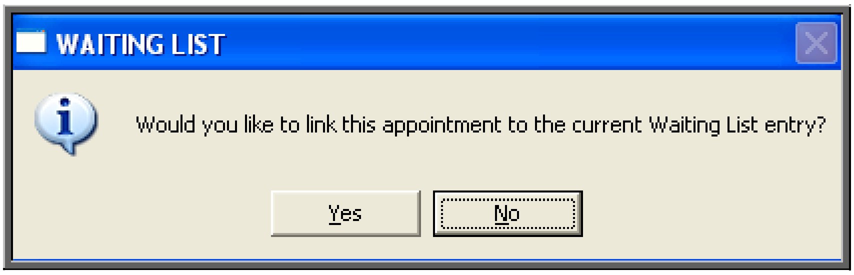
If you select the ‘autoclock’ option when the Venue has not been selected in the Waiting List screen, the following error message will appear.

Whichever clock is used, the appointment made will be linked to the waiting list record and the date of the appointment will be entered into the *Appointment:* field on the Waiting List screen so that you know there is a future appointment booked.

The Appointment screen will also show that the appointment is linked to the waiting list.

b) Other methods of making appointments

If an appointment is made using the 'clock' icon  on the Patient or Care Episode screen, or manually through the Session or Diary screen, OPAS will check to see if the patient is on the waiting list, and if they are, and an appointment hasn't already been assigned, you will be asked if you wish to link the appointment to the waiting list.



If Yes is selected, the date of the appointment will be entered into the *Appointment:* field on the Waiting List screen so that you know there is a future appointment booked.

The Appointment screen will also show that the appointment is linked to the waiting list.

7. Linking the Waiting List to a Care Episode

If a patient on the waiting list has a care episode belonging to the same Purchaser, a banner at the top of the Waiting List screen will notify you of the case number.

Only appointments made from the Waiting List or Care Episode screens will be linked to the care episode.

8. Taking patients off the Waiting List

There are a number of ways in which patients can be taken off the waiting list; depending on your system parameters (see Waiting List - Note 2. Setting Waiting List parameters).

a) Manually

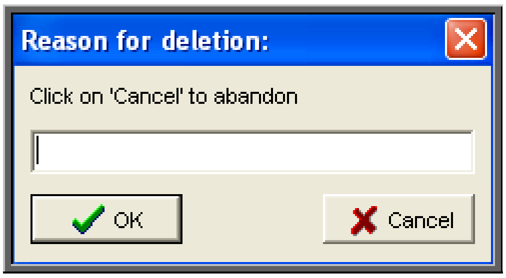
A patient can be taken off the waiting list manually at any time.

Menu: Patients

or

Menu: Waiting List – Current

If you wish to remove a patient from the waiting list without making an appointment then click on the 'delete' icon  (Edit, Delete).



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

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

The waiting list record will then move from the Current to the Removed Waiting List.

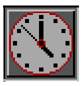
The information regarding their waiting list entry can still be viewed by going into Waiting List – Removed, or by finding the patient in Patients and clicking on Goto, Waiting List, Removed at the top of the screen.

Once a patient has been removed from the current waiting list the  message will be removed from the Patient screen.

b) By making an appointment

If you have set your waiting list parameters to Made, the patient will be removed from the waiting list when an appointment has been made for them.

i) Via the Waiting List screen

Whichever clock is used, ('clock'  (Appoint, Next) or 'autoclock'  (Appoint, Quick)), the appointment made will be linked to the waiting list record. The Waiting List screen will be updated with the appointment date, when the appointment was made and by whom.

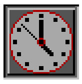
The waiting list record will then move from the Current to the Removed Waiting List.

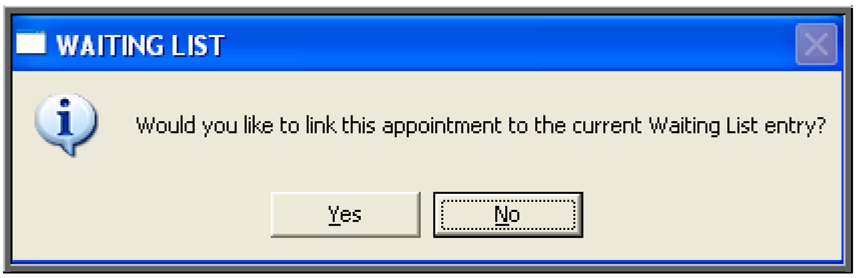
The information regarding their waiting list entry can still be viewed by going into Waiting List – Removed, or by finding the patient in Patients and clicking on Goto, Waiting List, Removed at the top of the screen.

Once a patient has been removed from the waiting list the 

message will be removed from the Patient screen.

ii) Via any other method

If an appointment is made using the 'clock' icon  on the Patient or Care Episode screen, or manually through the Session or Diary screen, OPAS will check to see if the patient is on the waiting list, and if they are, and an appointment hasn't already been assigned, you will be asked if you wish to link the appointment to the waiting list.



If Yes is selected, the Waiting List screen will be updated with the appointment date, when the appointment was made and by whom.

The waiting list record will then move from the Current to the Removed Waiting List.

The information regarding their waiting list entry can still be viewed by going into Waiting List – Removed, or by finding the patient in Patients and clicking on Goto, Waiting List, Removed at the top of the screen.

Once a patient has been removed from the waiting list the message will be removed from the Patient screen.

c) By a patient attending an appointment

If you have set your waiting list parameters to Attended, the patient will be removed from the waiting list when an appointment is logged/updated as Attended in the *Outcome* field on the Appointment screen.

The appointment must be linked to the waiting list record, which is done when the appointment is added. If you are unsure, the *Waitlist:* field on the Appointment screen will show whether they are linked.

Once the appointment is marked as Attended, the *Removed*:, *By* and *Reason*: fields on the Waiting List screen will be updated.

The waiting list record will then move from the Current to the Removed Waiting List.

The information regarding their waiting list entry can still be viewed by going into Waiting List – Removed, or by finding the patient in Patients and clicking on Goto, Waiting List, Removed at the top of the screen.

Once a patient has been removed from the waiting list the Waiting List message will be removed from the Patient screen.

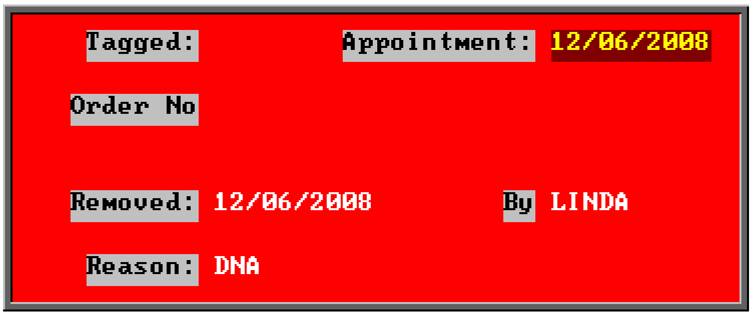
d) By a patient **not** attending an appointment

If you have set your waiting list parameters to Attended, the patient may be removed from the waiting list when an appointment is logged/updated as Did Not Attend in the *Outcome* field of the Appointment screen.

i) Remove on DNA: set to Yes

When the appointment is marked as Did Not Attend, you will be given the option to make another appointment for the patient.

If No is selected, the *Removed:*, *By* and *Reason*: fields on the Waiting List screen will be updated.



The waiting list record will then move from the Current to the Removed Waiting List.

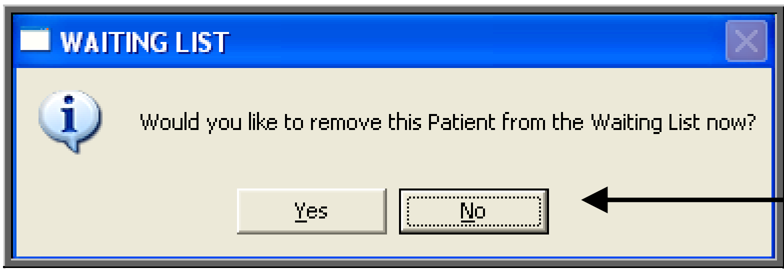
The information regarding their waiting list entry can still be viewed by going into Waiting List – Removed, or by finding the patient in Patients and clicking on Goto, Waiting List, Removed at the top of the screen.

Once a patient has been removed from the waiting list the message will be removed from the Patient screen.

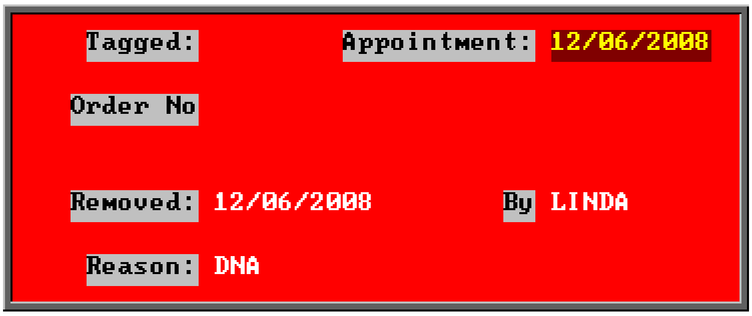
ii) Remove on DNA: set to Ask

When the appointment is marked as Did Not Attend, you will be given the option to make another appointment for the patient.

If No is selected, you will be asked if you wish to remove the patient from the waiting list.



If Yes is selected, the *Removed*:, *By* and *Reason*: fields on the Waiting List screen will be updated.



The waiting list record will then move from the Current to the Removed Waiting List.

The information regarding their waiting list entry can still be viewed by going into Waiting List – Removed, or by finding the patient in Patients and clicking on Goto, Waiting List, Removed at the top of the screen.

Once a patient has been removed from the waiting list the 

message will be removed from the Patient screen.

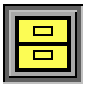
If No is selected, the patient will remain on the waiting list, but the contents of the *Appointment:* field will be deleted, to show that the patient is waiting for an appointment.

9. Archiving the Waiting List

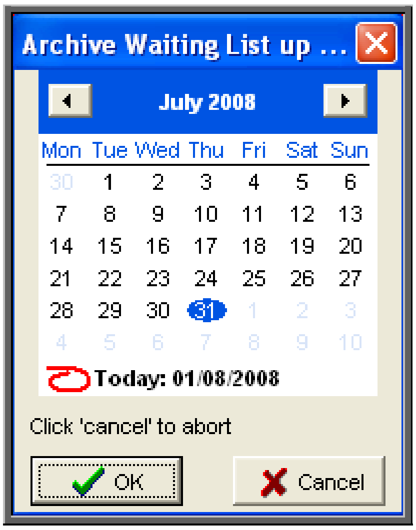
As patients are removed from the waiting list, the record moves from the Current to the Removed waiting list. The records in the Removed waiting list should be regularly archived (as you do with appointments).

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

Menu: Waiting List – Removed

Click on the 'archive' icon  (Archive).

Select the date to archive up to and click on OK. (The date is looking at the *Removed:* date field on the waiting list)



Once the icons at the top of the screen return, the archive is complete.

The waiting list record will then move from the Removed to the Archived Waiting List.

The information regarding their waiting list entry can still be viewed by going into Waiting List – Archived, or by finding the patient in Patients and clicking on Goto, Waiting List, Archived at the top of the screen.

10. Waiting List reports

a) Archived

This report interrogates the archived waiting list. The archived waiting list contains those patients that have been removed from the current waiting list. This can be because they have been given/attended/DNA'd an appointment or have been manually deleted from the list.

Menu: Reports – Waiting List – 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 the Type required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Type field empty will result in all types being selected

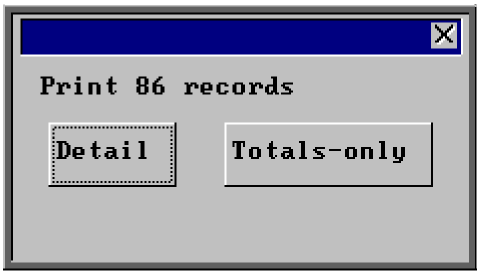
- select the Orthosis Code required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection.

  Leaving the Orthosis Code field empty will result in all orthosis codes being selected

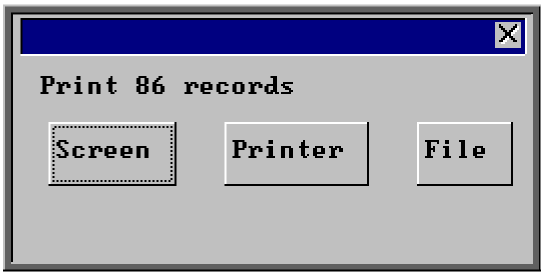
- select the Referrer required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Referrer field empty will result in all referrers being selected

- select the Venue required 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
- select whether the date range entered should look at the Added:, Referred: or Removed: date on the waiting list screen



You will be shown how many waiting list entries OPAS has found and ask if you want to see the information in Detail i.e. a line for each waiting list entry or just Totals-only



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.

Below is an example of an Archived report in Detail.

All Purchasers
Added: 01/05/2008 - 26/06/2008

Hospital No	Surname	Added:	Removed:	Days:	Reason:
TORUS44	SMITH	02/05/2008	03/06/2008	32	Attended Appointment
NTEMP000012	DOE	16/05/2008	27/05/2008	11	Attended Assessment Appointment
NG0108922	ASHER	25/05/2008	25/06/2008	31	Appointed
NF381231	HEAVER	27/05/2008	02/06/2008	6	Appointment made
NG0416854	DOWNEY	28/05/2008	29/05/2008	1	Attended Appointment
TORUS44	SMITH	04/06/2008	19/06/2008	15	DNA

Below is an example of an Archived report in Totals_only.

Hospital No	Surname	Added:	Removed:	Days:
			Average for Purhcaser	198
			Count	53
			Average for Purhcaser NHS TRUST	16
			Count	32
			Average for Purhcaser GP Fundholder	2
			Count	1
			Grand Total Average	128
			Count	86

The report layout (wl_arch.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

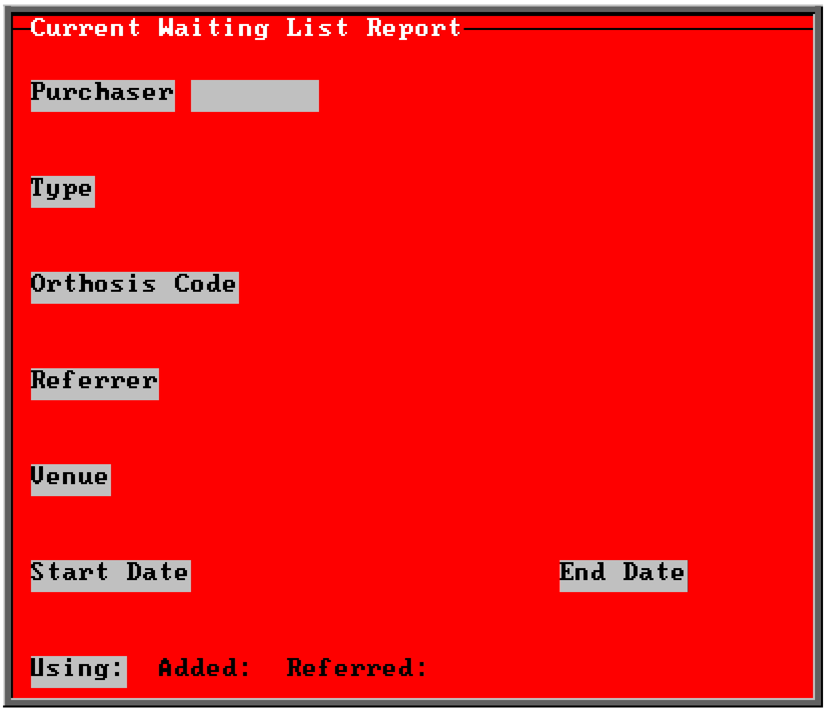
File

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

b) Current

This report interrogates your current waiting list i.e. all those patients still on the waiting list.

Menu: Reports – Waiting List – Current



- 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 Type required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Type field empty will result in all types being selected

- select the Orthosis Code required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Orthosis Code field empty will result in all orthosis codes being selected

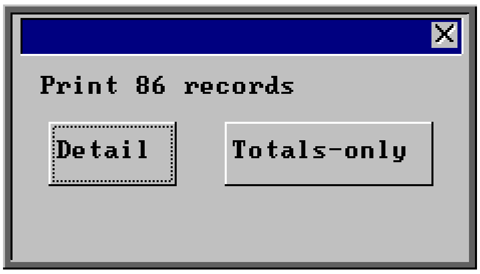
- select the Referrer required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Referrer field empty will result in all referrers being selected

- select the Venue required 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

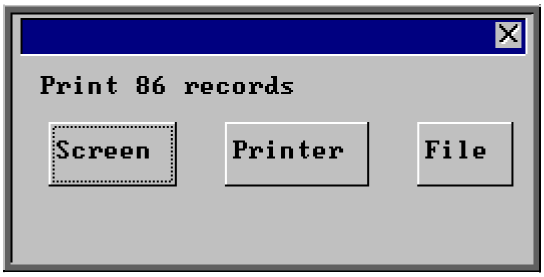
- enter the Start date of the required date range in the format DD MM YYYY

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

- select whether the date range entered should look at the Added: or Referred: date on the waiting list screen



You will be shown how many waiting list entries OPAS has found and ask if you want to see the information in detail i.e. a line for each waiting list entry or just Totals-only



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.

Below is an example of a Current report in Totals_only.

```
tal  No   Surname            Added:      Priority:     Days:

                                                     ________
              Average for Purchaser NHS TRUST            33
                                                     ========
                                          Count      23

                                                     ________
           Average for Purchaser GP Fundholder           48
                                                     ========
                                          Count      2

                                                     ________
       Average for Purchaser Primary Care Group          67
                                                     ========
                                          Count      1

                                                     ________
                         Grand Total Averages            35
                                                     ========
                                          Count      26
```

Below is an example of a **Current** report in **Detail**.

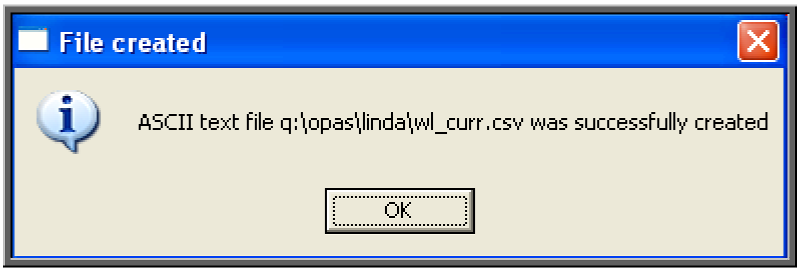
NHS TRUST
Added: 01/01/2000 - 26/06/2008

	Hospital No	Surname	Added:	Priority:	Days:	Description:
1	NTCRUS0077	SELBY	08/04/2008	395	79	Custom Footwear
1	NG0816485	HABIBIS	13/02/2008	134	134	Custom Footwear
1	NG0417666	DAVISON	03/06/2008	115	23	Custom Footwear
1	NG0230557	BEGG	05/06/2008	105	21	Custom Footwear
1	TMP000023	LARGE	05/06/2008	105	21	Custom Footwear
1	NAB123456	SHIEL	06/06/2008	100	20	Custom Footwear
1	NAH280965	BROWN	06/06/2008	100	20	Custom Footwear

The report layout (wl_curr.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



Orders

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).

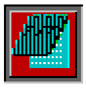
Throughout OPAS you will see Orders being referred to as History. This is because the details of the orders, which can be seen on the patient record, are providing a history of that patients past and current care.

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  (Goto, History, Current) to go to the current orders for that patient

2. 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

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

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 (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.

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

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 (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.

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

Patient Patient name will be brought through from the patient record.

Sex (M)ale or (F)emale will be brought through from the patient record.

DOB DOB will be brought through from the patient record.

Purchaser 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.

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

Order Number The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities – Note 31. Order numbers). You can overtype 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).

Supplier 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.) A default can be set for this field in Utilities – Choices – Defaults.

Cross Ref or Hsp Order No This is an optional field where you may wish to quote a supplier's reference number or an internal reference number. If a blanket order number has been assigned to the supplier, this will appear automatically in this field.

Description 50 characters available to describe in simple words what the order is for. This description can 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 – History – Descriptions)

Orthosis Code 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)

Referrer 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.

In-patient: Type **N** for No or **Y** for Yes.

Paid If the patient has to pay a prescription charge for the goods, the date they pay can be entered here in the format DD MM YYYY. To leave this field blank press the **Enter** key.

Receipt: If the patient has to pay a prescription charge for the goods, the receipt number can be entered here.

Amount: If the patient has to pay a prescription charge for the goods, the amount they paid can be entered here.

Pres No: If you are using Prescriptions, the prescription that the order is linked to will automatically appear here.

Expected This date will be calculated from the Orthosis Code that was entered

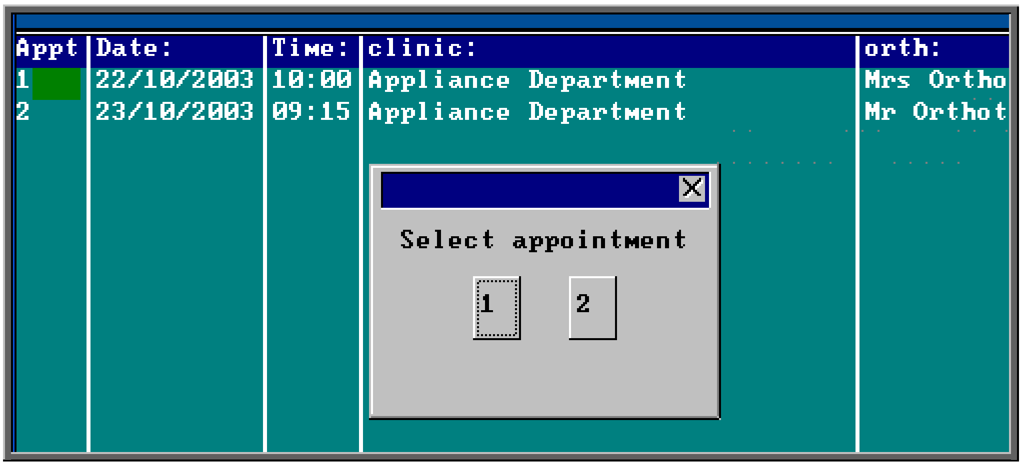
Supply Date: above. When the Orthosis codes are set up there is the opportunity to say how long that type of item takes to be delivered. If an Orthosis Code has been set up with a delivery of 7 days, the *Expected Supply Date* will show as 7 days from today's date. If the delivery field is not used when the Orthosis Code is set up, the *Expected Supply Date* will show as today's date. The date that appears can be overtyped with another date if required.

ACO What you enter here will determine what OPAS will do when you book the goods in as being received.

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.

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.

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 *Appointment* 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.



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.

A default can be set for this field in Utilities – Choices – Defaults.

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**, **C** or **T** 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 you enter **A** in the *ACO* field, 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 a Friday.
APE	If you enter **A** in the *ACO* field, you can specify whether the appointment made should be an **A**M, **P**M or **E**vening appointment.
Letter:	If you enter **A** or **C** in the *ACO* field, you can state which letter type will be required. The field will default to your default standard appointment/collection letter (as set in **Utilities – Users/Appointments – Venues**) but can be overtyped with an alternate letter template/
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.
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 for the patient. If the pop-up list is empty, there are no current care episodes for the patient.
	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.

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 the vat code held against the item code but you can overtype this with an alternate VAT rate. If you have not entered an item code, the VAT code will default to S.

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 29. NSI) so that the price will appear automatically in future.

If the supplier of the order trades in another currency other than pound sterling (£), then the value should be entered in the suppliers currency. (see Orders - Note 22. Multi-currency orders)

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.

Technician 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 – History – Technicians.

Ward 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.

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

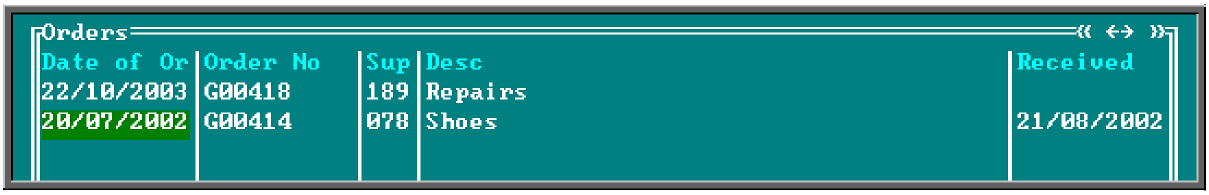
3. Adding a repeat order

If you need to add an order to a patient when they have already had an order for a similar orthosis, rather that 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  (**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.)

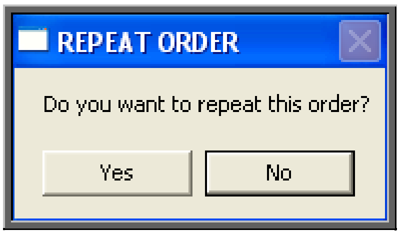


Now click on the 'enter' icon  (Edit, Enter) and the box below will appear.

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  (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.

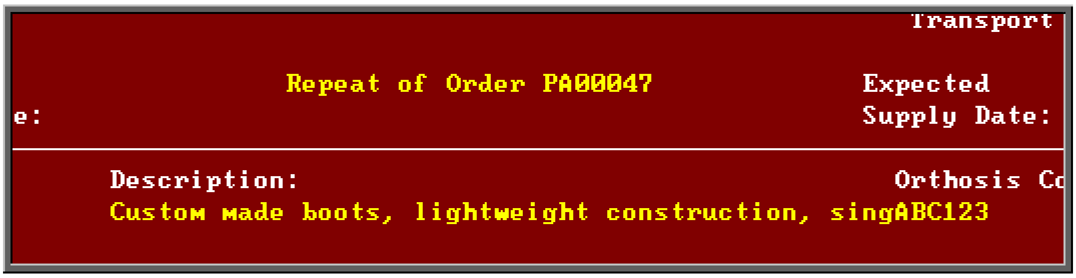


Click on Yes to continue.

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.

Repeat order information will appear just above the Detail table. This field can be included on the printed order if the suppliers would find it useful.



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.

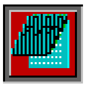
4. Amending an order

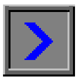
There are two ways to amend an order. You can amend an order from the Patients screen or by going into History.

1. From the patient screen

Menu: Patients

Find the patient whose order you wish to amend.

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

Use the 'arrow' icon  (**F6**) to find the order you wish to edit, and then click on the 'update' icon  (Edit, Update).

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

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  (Edit, Update).

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
Care Episode
Code
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.

5. 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 7. 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 11. 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.

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

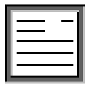
Press **Ctrl-Enter** to save the changes made. The following prompt will appear.

Press the **Enter** key.

Even though you have set the number of copies to instant print in the System parameter screen, if you have specific purchasers or specific suppliers that require additional copies to be printed, this can be automated.

a) Printing additional copies for a supplier

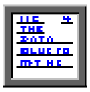
Menu: Utilities – Choices – Finance – Accounts

To request additional copies for a supplier, click on the ‘enter’ icon  (Edit, Enter).

Select the relevant supplier from the pop-up list and move down to the *Copies* field. Enter the number of **additional** copies required. This will then work for both stock and patient orders.

b) Printing additional copies for a purchaser

Menu: Utilities – Choices – Purchasers

To request additional copies for a purchaser, find the relevant purchaser and click on the ‘update’ icon  (Edit, Update).

Move down to the *Copies* field, and enter the number of **additional** copies required. This will then work for just patient orders (Stock purchase orders are not assigned to a purchaser).

6. Faxing orders as they are raised

Individual suppliers can be set up to have their orders faxed directly to them.

To be able to fax orders direct to the supplier, your computer must have a fax driver and this needs to be entered in the *Fax printer* field in the system parameters screen (Utilities – Choices – System)

Menu: Utilities – Choices – History – Fax

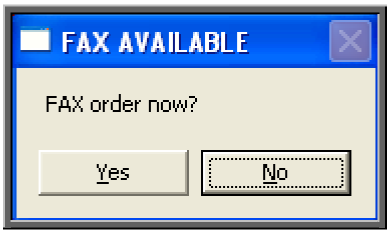
If you wish to fax orders to all suppliers then leave this screen blank. Otherwise, specify those suppliers you wish to fax to by adding them in this screen.

To specify particular suppliers for faxing, click on the 'enter' icon (Edit, Enter).

Find the supplier in the pop-up list and press **Enter**.

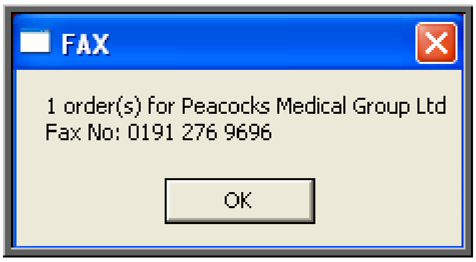
That supplier will be added and the pop-up list will appear again to choose another supplier. Continue to select suppliers until you have specified all those that you wish to fax to. Then press **Esc** to remove the pop-up list and then press **Esc** twice more to come out of the Fax screen.

Once a supplier has been identified as a fax supplier, whenever an order for that company is entered onto OPAS, you will be asked after completing the order if you would like to fax it straight away.



If No is selected, you will still have the opportunity to fax the order later in batch or individually.

Select Yes to fax 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.

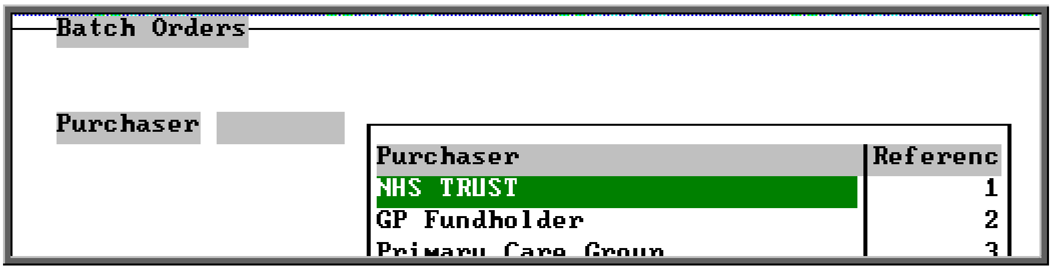
The supplier number should remain at the bottom of the Order screen until the fax is sent. We are aware though that some fax software clears the fax number from the Order screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen.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

7. Printing/Faxing orders in batch

Orders can be printed in batches (e.g. at the end of the day). This is useful where special stationary is needed or the printer is shared. The standard setting for batch printing is that OPAS will find all the unprinted orders that you have entered over the last 14 days. However, if it is more appropriate, OPAS can be set to give you the option to print all unprinted orders for a particular purchaser, regardless of who entered the order on to the computer.

If this is the case go to Utilities – Choices – System and within the Printing section set the *Select Purchaser* field to Y.

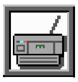
If *Select Purchaser* is set to Y, when you batch print orders, you will be asked to select which purchaser (from the pop-up list) you want to print.



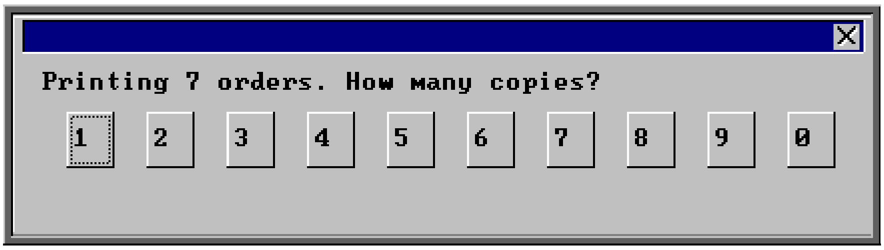
If you want to print all orders for all purchasers, simply press **Esc** at this screen.

Menu: History – Orders

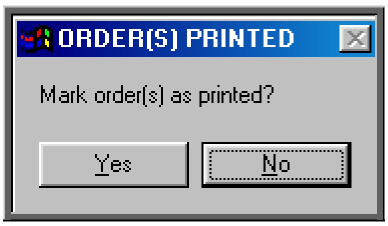
a) Printing to the printer

Click on the ‘print’ icon  (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:

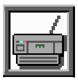


Since problems can arise with printers, we recommend that you wait until all the orders have emerged from the printer and been checked before responding Yes to this prompt. If there have been problems, e.g. the printer has run out of toner, respond with No and these orders will then print again next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

If you accidentally mark the orders as printed when they didn't actually print successfully see Orders - Note 8. Re-printing a batch of orders.

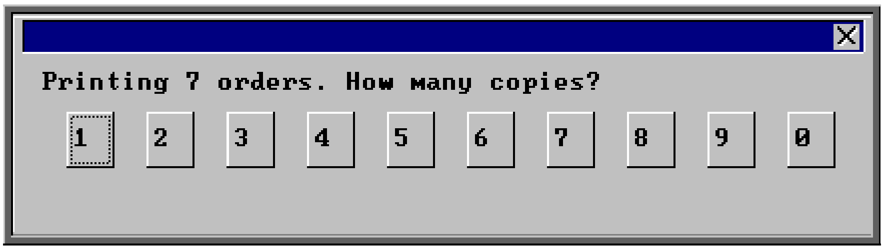
b) Faxing orders direct to suppliers

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)

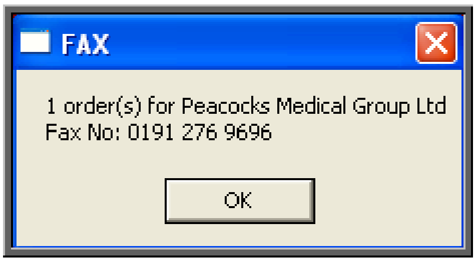
Click on the 'print' icon  (File, Print) and then select Orders from the print menu.

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 be 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 who is set as a fax supplier and has unprinted orders.

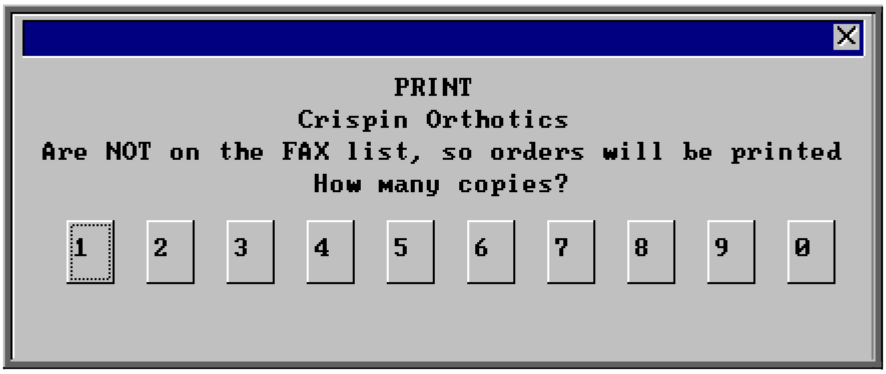


On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

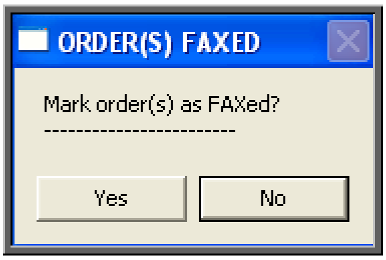
The supplier number should remain at the bottom of the Order screen until the fax is sent. We are aware though that some fax software clears the fax number from the Order screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen. 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 – Choices – History – Fax (see Utilities - Note 12. Choices - History - Fax), the following prompt will appear.



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.

8. 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.

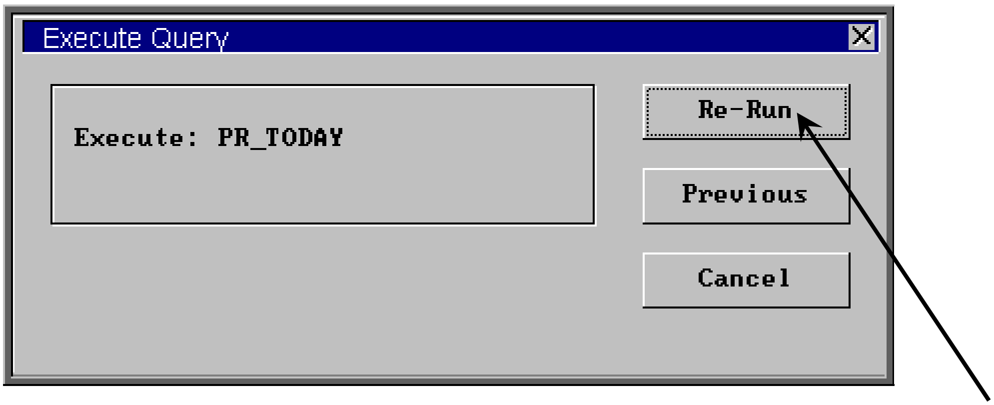
Menu: History – Orders

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

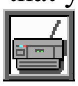


If you have not run this query before the option will be Run instead of Re-Run.

Click on Run or Re-Run.

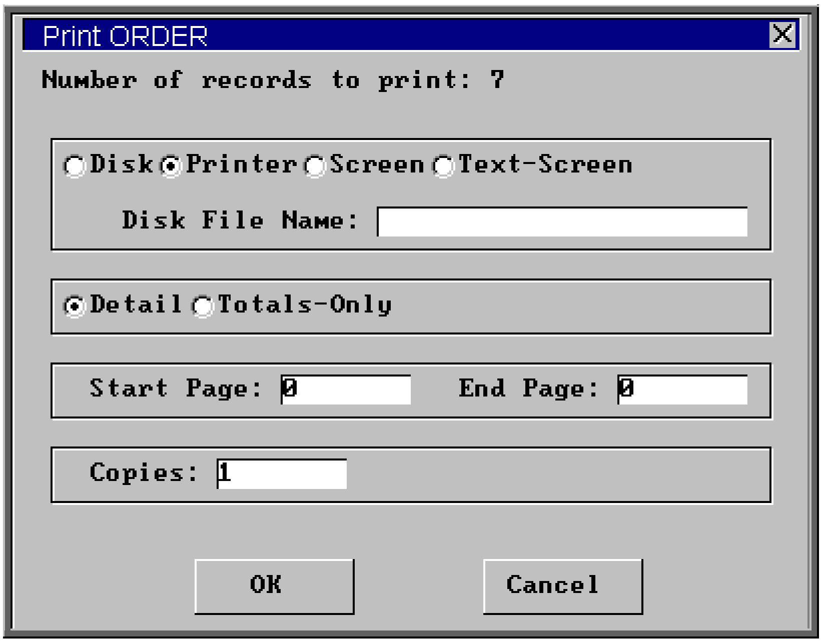
A Query Summary box will appear in the middle of the screen when it has found those orders where the printed date was today.

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  (File, Print) and select Custom Report.

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

Click on Run.



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.

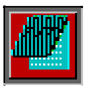
Note: Until you come out of the Order screen, the only orders you can see are those that you have just reprinted. To see all the orders again, either come out to a menu and back into the option, or click on the 'ABC' icon  (Sort, Physical).

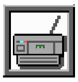
9. Re-printing individual orders

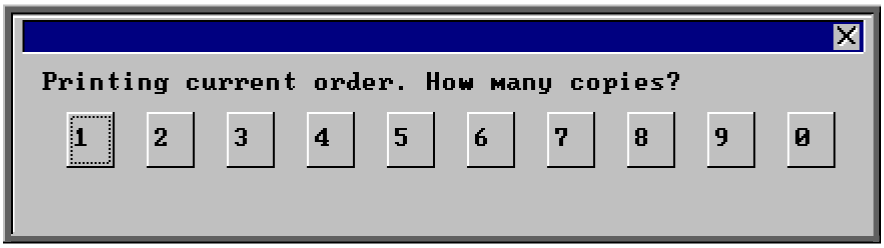
If you have lots of orders to print it is best to print them in batch (see Orders - Note 7. Printing/Faxing orders in batch), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: Patients

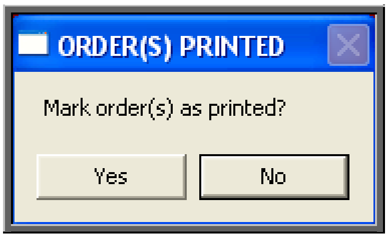
Find the patient whose order you wish to print.

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

Find the relevant order, click on the ‘print’ icon  (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.

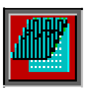
You can print an individual order as many times as you need. The fact that it has been printed before, or that it has been marked as printed will not prevent you from printing a single order from the Patient screen.

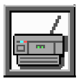
10. Re-faxing individual orders

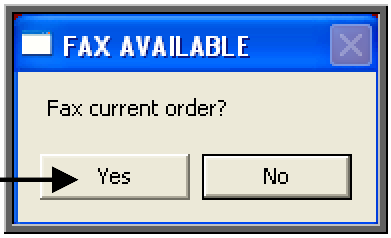
Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen and the supplier be set up as a fax supplier. (see Orders – Note 6. Faxing orders as they are raised)

Menu: Patients

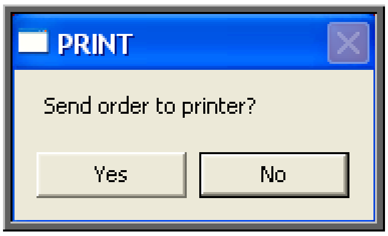
Find the patient whose order you wish to fax.

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

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

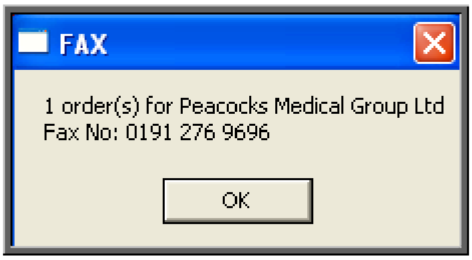


The above prompt will appear. If you do not want to fax the current order, and say No, the following prompt will appear.



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 at the Fax order prompt a message 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.

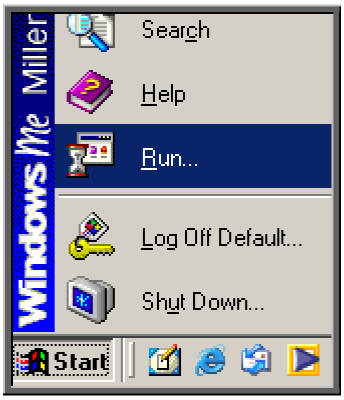
11. E-mailing orders

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

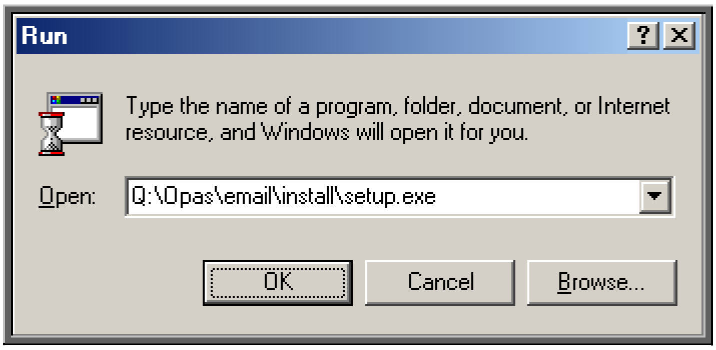
Step 1. Installing the e-mail daemon

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.

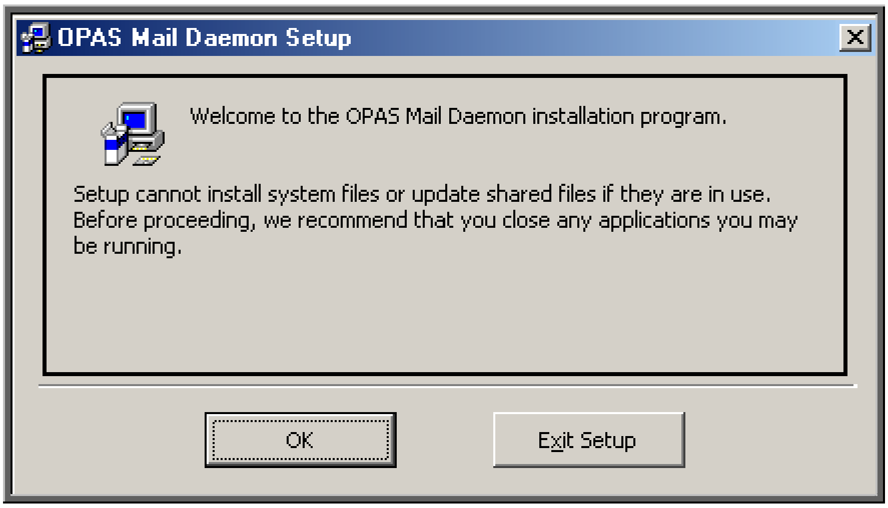


Use the Run option on your Start button to select Q:\Opas\email\install\setup.exe.

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.

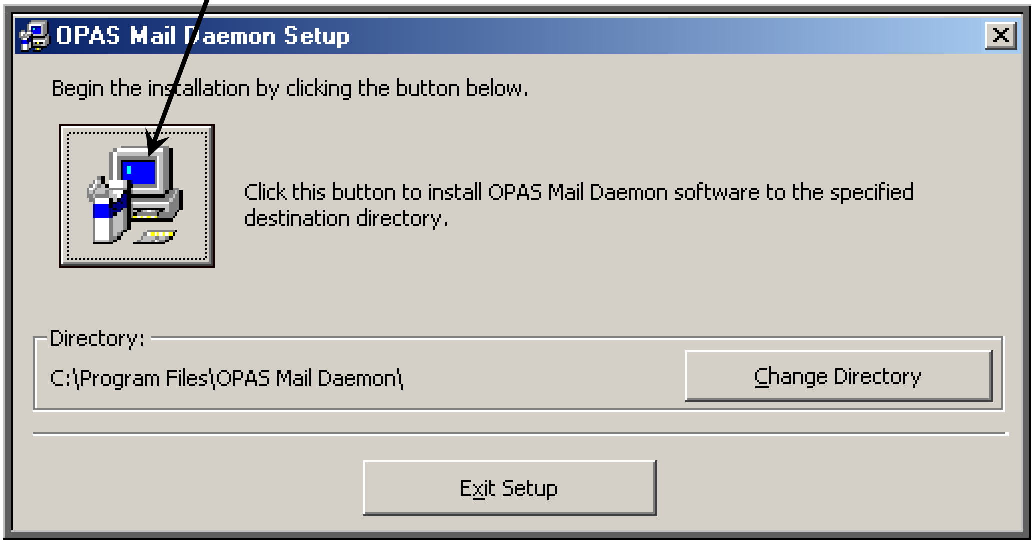


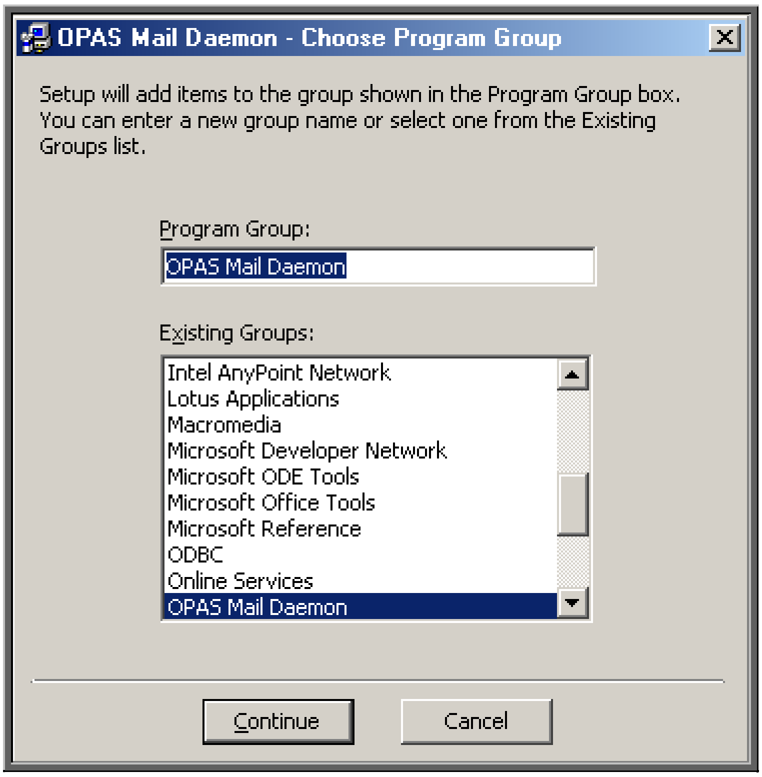
Click on OK to continue.



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.

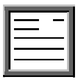
Step 2. Switching e-mail on in OPAS

Go into Utilities – Choices – System. Press the Page-Down key and 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.

Menu: Utilities – Choices – History – E-mails.

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

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

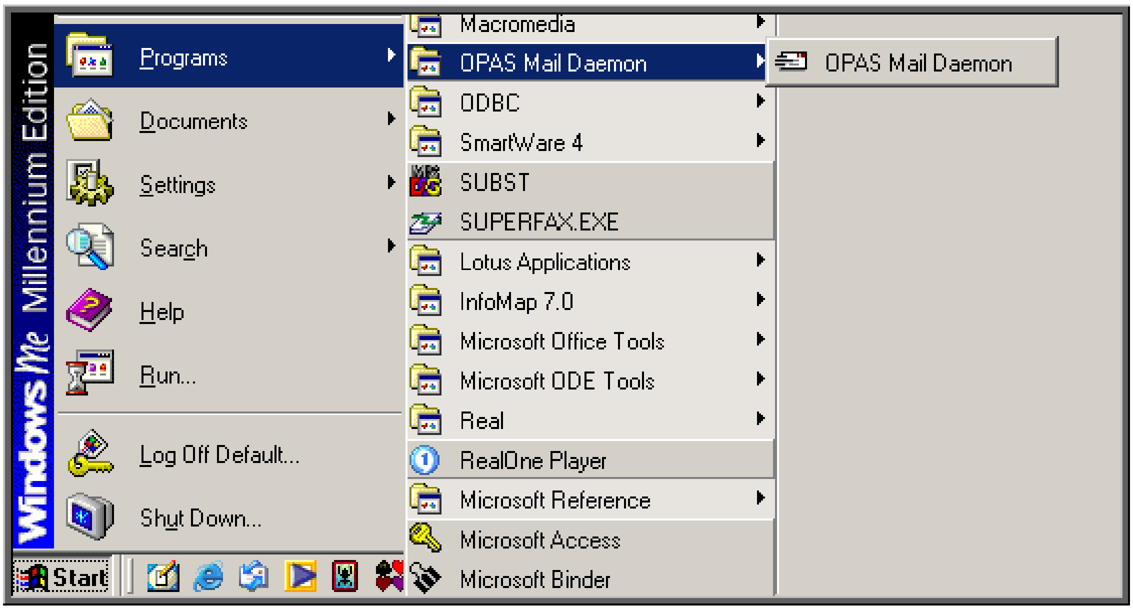
Address: enter the e-mail address for the supplier

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

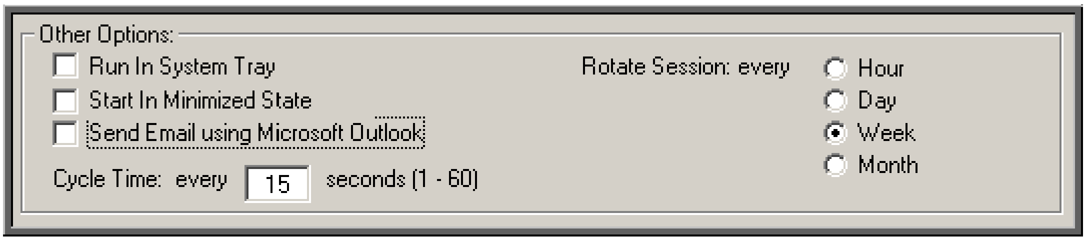
Step 1. Switching on the OPAS daemon.

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.

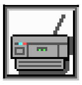
If you do not wish to e-mail the order, click on No.

If you do not e-mail the order now, you can always do it later.

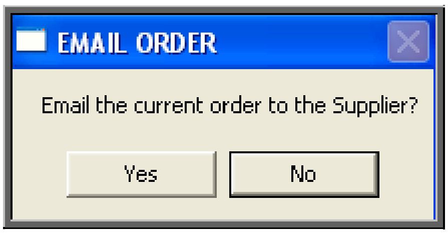
If you wish to e-mail the order, click on Yes. The order will be sent to the OPAS Mail Daemon and then on to your e-mail software. If your e-mail software is not currently running, it is likely that it will prompt you to open your e-mail system so that the order/message can be sent.

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.

12. Re-emailing orders

If an order is not e-mailed when it is raised, or if you wish to e-mail an order again, this can be done by finding the order (either from the Patient screen or via History – Orders) and clicking on the 'print' icon  (File, Print).

Select Email from the Print menu.



Click on Yes to continue.

Note: Orders can only be e-mailed to suppliers that have been set up in Utilities – Choices – History – E-mails.

13. Deleting an order

Menu: History – Orders

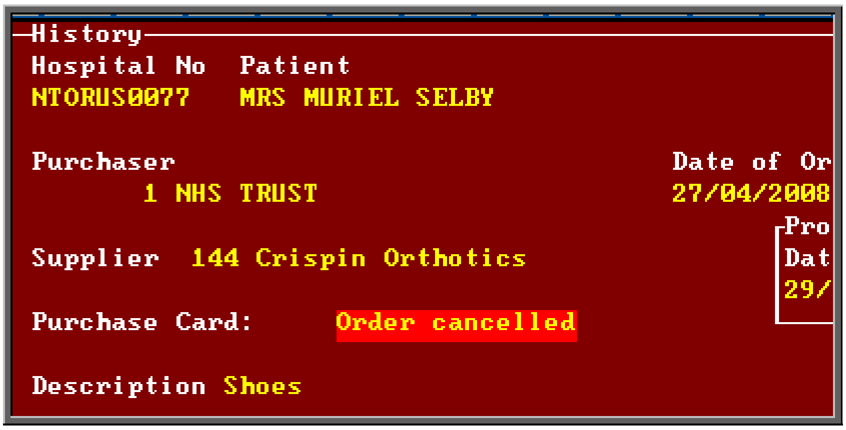
Find the relevant order and then click on the 'delete' icon  (Edit, Delete).

You are asked to confirm deletion of the order.

If you select Yes, you will be asked at the bottom of the screen to enter a reason for cancelling the order.

It is not mandatory to enter anything, but information typed in here will appear in the progress screen. (The Progress screen can be accessed by clicking on the word Progress above the icons on the Order and Invoice screen.)

The record is now 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.



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

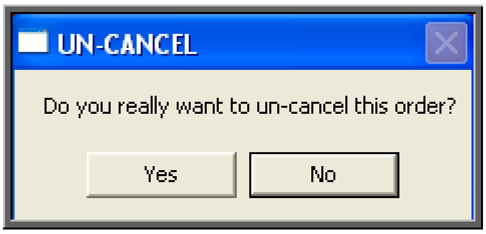
If you want to permanently remove the order from OPAS so that there is no longer any record of it, this can be done by clicking Edit, Krunch.

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

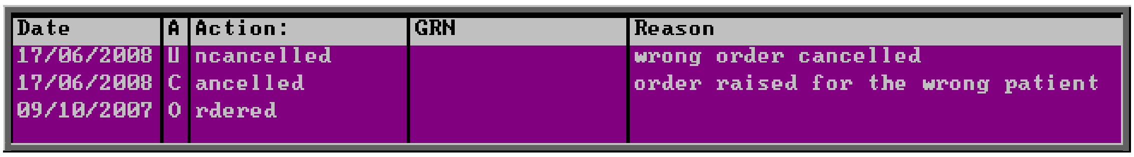
Un-cancelling an order

If you need to un-cancel an order, find the relevant order and then click on the 'delete' icon  (Edit, Delete) again.

You are asked to confirm that the order is to be un-cancelled.



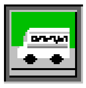
Again you will have the option to enter a reason, and the progress screen will be updated.



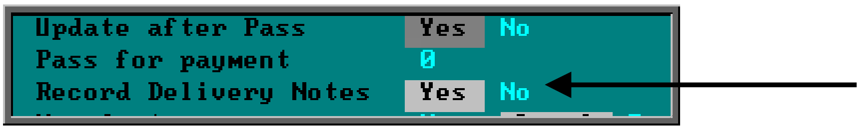
14. Receiving an order

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.

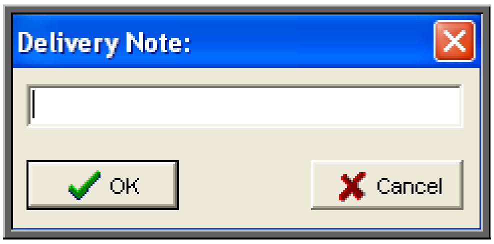
Menu: History – Orders

Find the relevant order and then click on the 'goods in' icon  (Goods, In).

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



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.

<u>'A' entered in the *ACO* field</u>

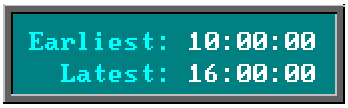
'A' is entered in the *ACO* field when the patient requires an appointment to be allocated when the goods have been received. Therefore, when you select Goods -

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)
- Morning/Afternoon/Evening appointment selected (optional)

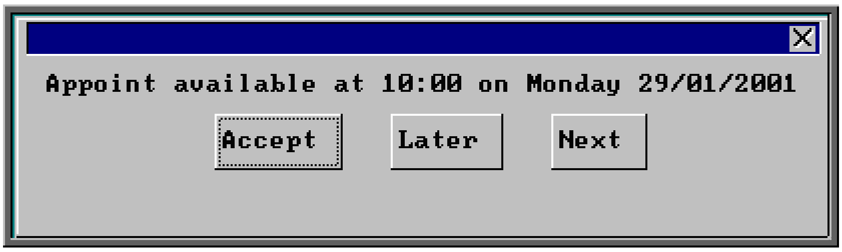
and also information held on the patient record

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.

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



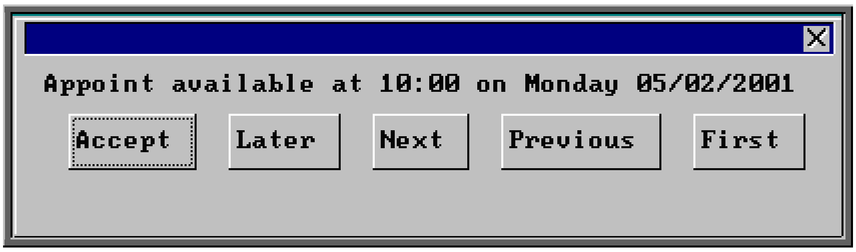
Accept If you are happy with the first date/time offered click on the Accept button with the mouse (type A).

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 (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 (type N).

If you wish to abandon finding an appointment press Esc

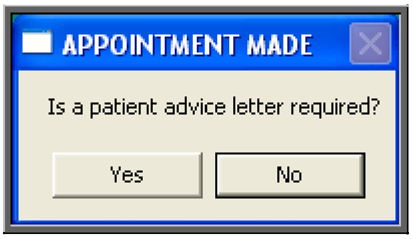
If you select Later and/or Next two more options become available.



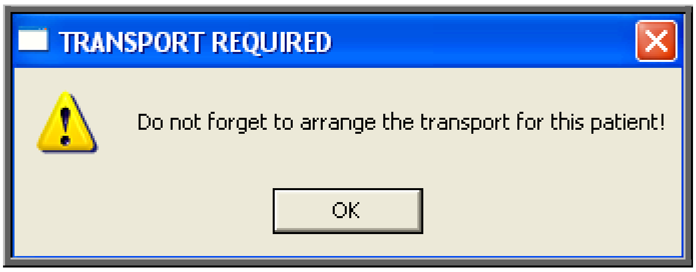
Previous Click on Previous (type **P**) to go back to the previous date offered.

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

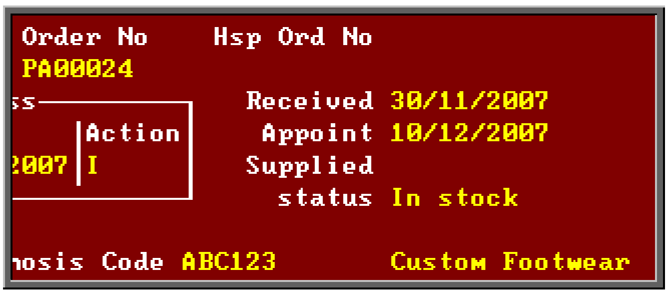
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.

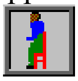


If the patient requires transport, you are reminded to arrange it:



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.



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  (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 be set to print instantly or subsequently be batch printed in Appointment – Print – Letters (see Appointments – Note 14. Instant Printing appointment letters and Note 16. Batch printing appointment/collection 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

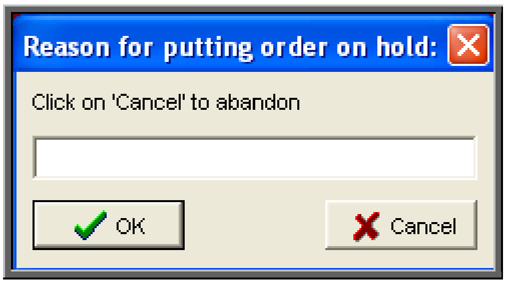
'O' is entered in the *ACO* field no action is required when the goods are booked in. Therefore, when you select Goods - In, the *Received* field will be populated with today's date and the *Status* changed from On Order to In Stock.

15. Holding an order

Orders can be put on hold at any time.

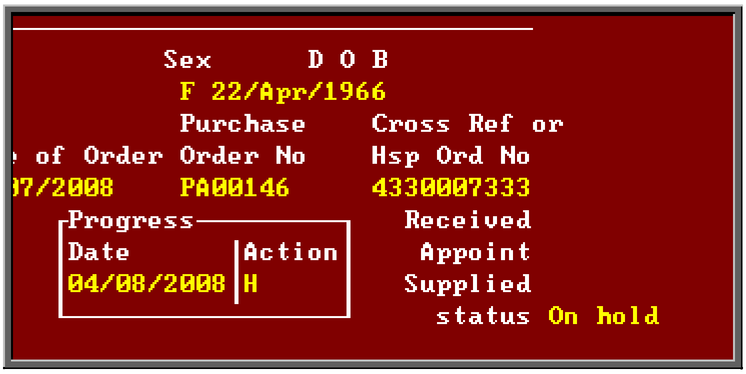
Menu: History – Orders

Find the relevant order and then click on Goods, Hold at the top of the screen.

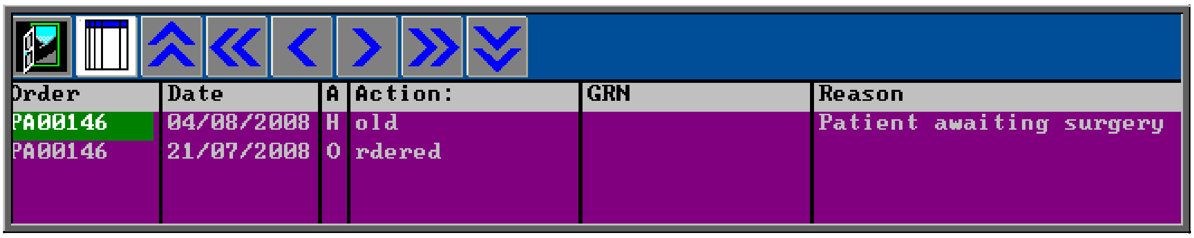


Enter the reason that the order is being put on hold and click on OK.

The status of the order will change to On Hold.



When you look at the progress information you will be able to see the Reason for the hold if entered. The Progress screen can be accessed by clicking on the word Progress above the icons on the Order and Invoice screen.

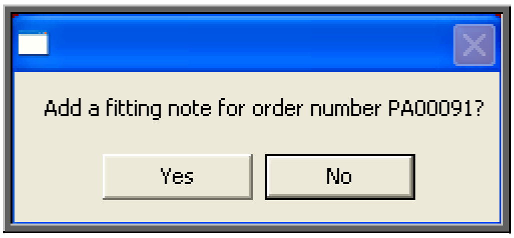


16. Entering fitting notes

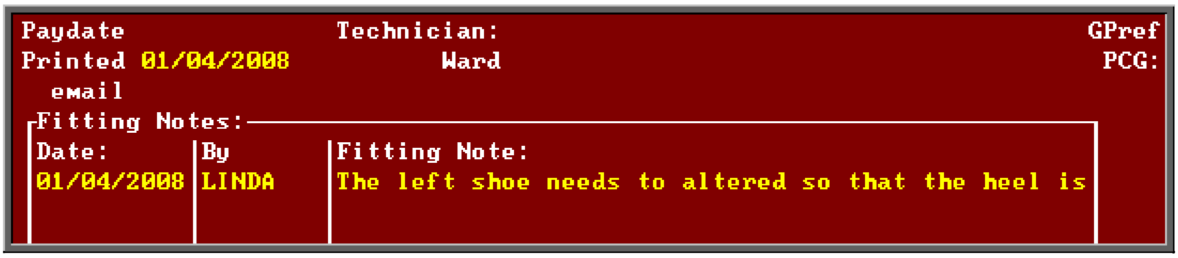
Fitting notes can be added to an order. As well as these notes providing information for administrative and clinical staff, they can be included in goods return notes (GRN) produced when goods are returned to the supplier.

Menu: History – Orders

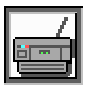
If you wish to add a fitting note, find the relevant order and click on the 'enter' icon  (Edit, Enter).



Select Yes to continue to the fitting note screen where you can type in the required Note: Once the note is complete, press **Ctrl-Enter** to save. The fitting note will appear in a summary table at the bottom of the Order screen. Where multiple fitting notes have been added, the most recent will be at the top.



To view the notes in full, or to edit them click on Goto – Fitting Notes above the icons at the top of the Order screen.

An order's fitting notes can be printed by clicking on the 'printer'  icon and selecting Fitting Notes.

New NHS Trust

FITTING NOTES

Greens Footwear Ltd **868 Osmaston Road** **Allenton** **Derby** **DE24 9AB**		Order No. Order Date Job No.	**PA00099** **19/04/2008** **4330007333**
PATIENT **12345QWERTY**		Clinic	**Orthotic Clinic**
MR KELVIN BLOGGS		Ward	**Ward 1**
Consultant	**Mr Surgeon**	Cost Code	**111111**
Directorate	**PCT**	Cost Centre	**4199**

Date:	By	Fitting Note:
16/05/2008	LINDA	To be finished off
08/05/2008	LINDA	Shoes to be returned to adjust heel on left

The fitting note report layout (fit_Note:dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

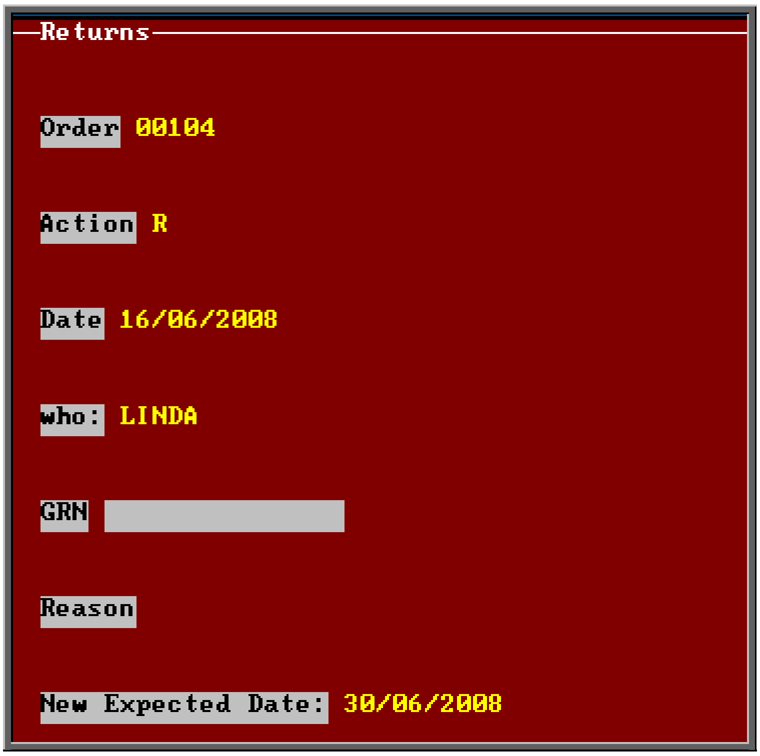
17. Returning goods

This option is used if goods need to be returned to the supplier, e.g. faulty or for finishing.

As well as updating the order, a Goods Return Note (GRN) can be produced if required.

Menu: History – Orders

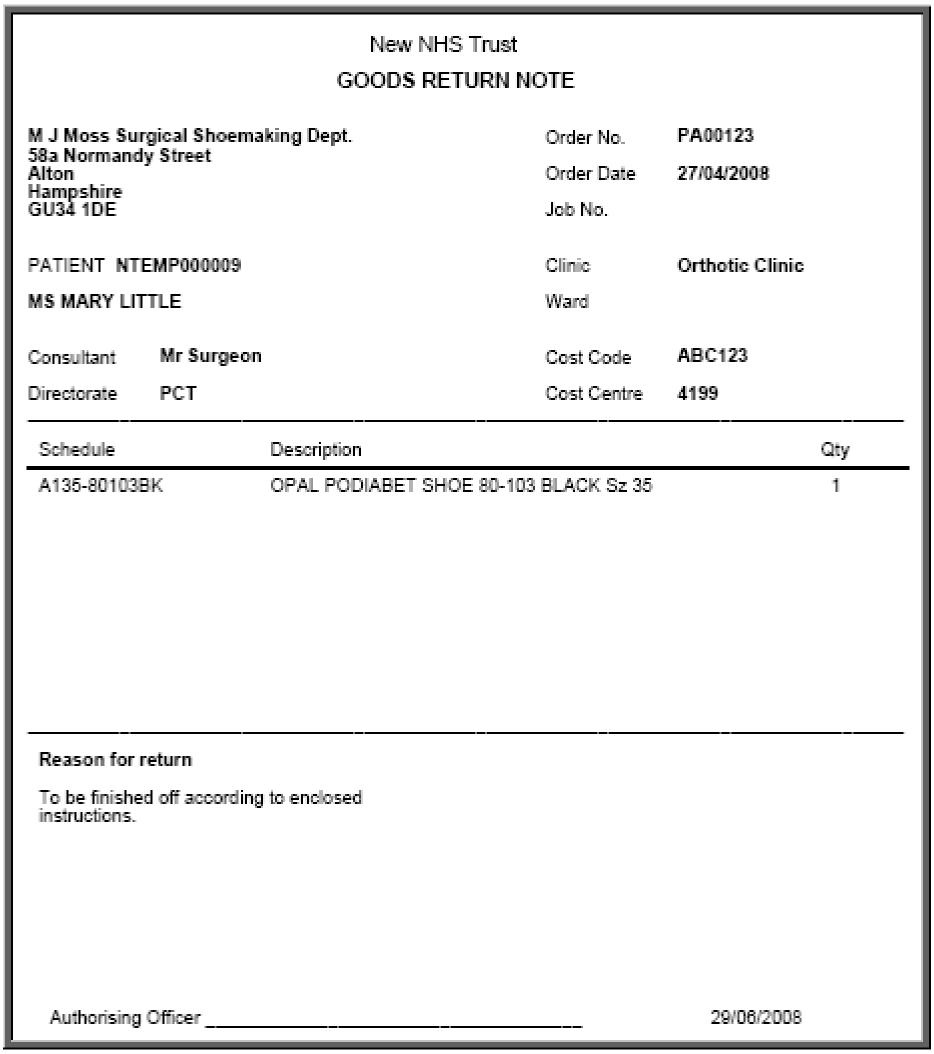
Find the relevant order and then click on the word Goods at the top of the screen, and then select Return from the drop down menu.



- enter a *GRN* (i.e. a goods returns number issued by the supplier to quote on the return) if applicable
- select a *Reason* from the pop-up list. (To set up a pop-up list for your reasons, go to Utilities – Choices – History – GRN Reasons.) If the reason does not appear in the list, press **Esc** and type the reason into the field
- the *New Expected Date:* will be calculated for you based on the delivery applied to the Orthosis code on the order, but can be overtyped if necessary

If you require a goods return note, select Yes at this prompt. Otherwise select No.

Below is an example of a goods return note:



New NHS Trust

GOODS RETURN NOTE

M J Moss Surgical Shoemaking Dept.
58a Normandy Street
Alton
Hampshire
GU34 1DE

Order No. PA00123

Order Date 27/04/2008

Job No.

PATIENT NTEMP000009

MS MARY LITTLE

Clinic Orthotic Clinic

Ward

Consultant Mr Surgeon

Directorate PCT

Cost Code ABC123

Cost Centre 4199

Schedule	Description	Qty
A135-80103BK	OPAL PODIABET SHOE 80-103 BLACK Sz 35	1

Reason for return

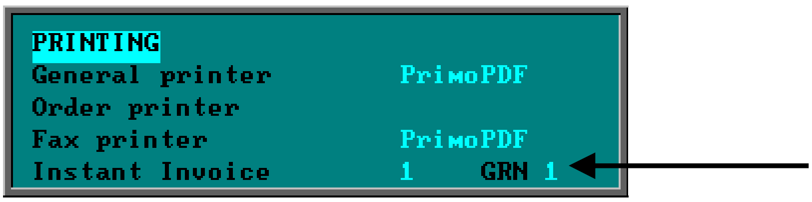
To be finished off according to enclosed instructions.

Authorising Officer ______________________________ 29/06/2008

The goods return note report layout (grn.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

When you look at the progress information you will be able to see the Goods Return Number and the Reason for return if entered. The Progress screen can be accessed by clicking on the word Progress above the icons on the Order and Invoice screen.

Note: If you will always need a Goods Returned Notification printing, then the *GRN* field 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 24. Choices - System).

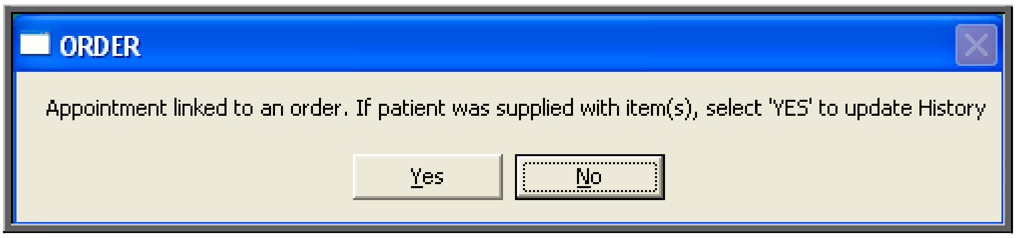
18. Supplying an order

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

If the patient was supplied while attending an appointment, if the appointment and order are linked then by marking the patient as attended can update the order automatically. Otherwise the order will have to be marked manually as supplied.

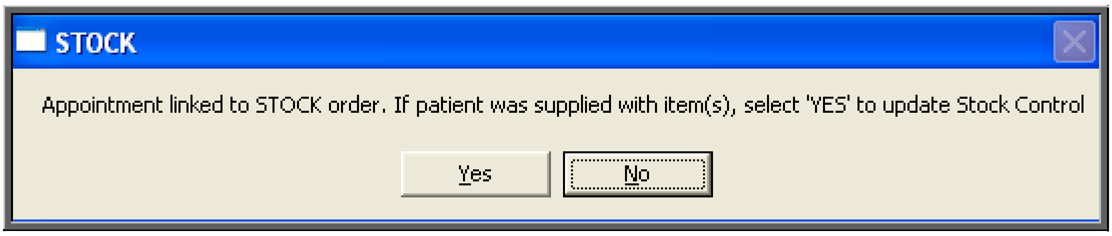
a) Through the appointment

If 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 an appointment *Outcome* of Attended) you will be asked if the patient was supplied.



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.

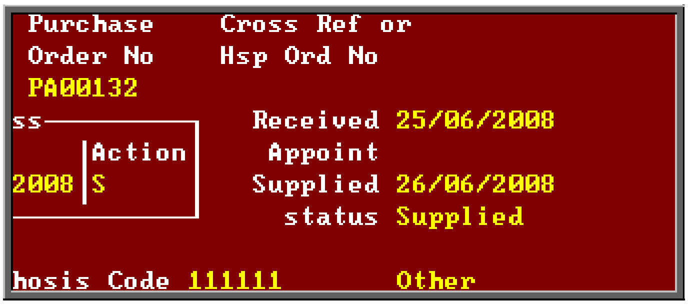


b) Manually

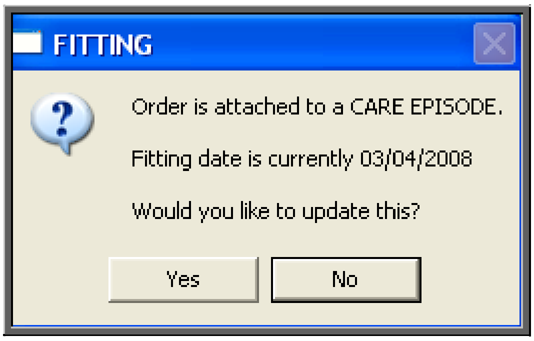
Menu: History – Orders

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.

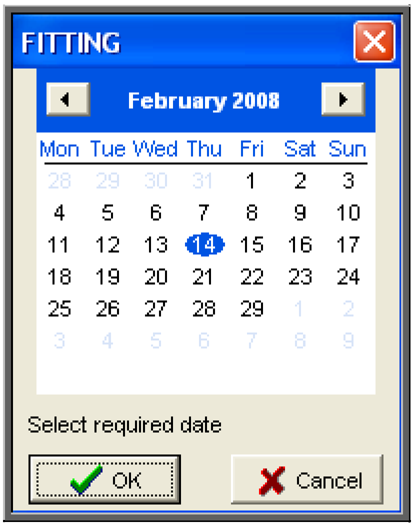
Today's date will be entered into the *Supplied* field and the *Status* changed from In Stock to Supplied.



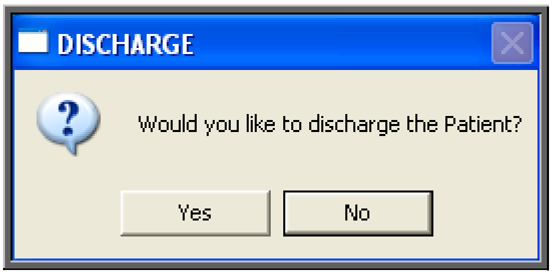
If an order that is linked to a care episode is marked as Supplied, you will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



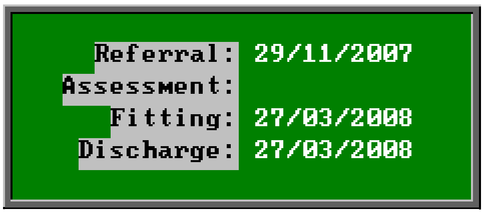
If you choose to update the fitting field, the calendar prompt will appear, so that a date can be selected. The calendar will default to today's date.



You then have the option to discharge the patient.



If **Yes** is selected, then the fitting date selected will also be entered into the *Discharge:* field on the care episode.



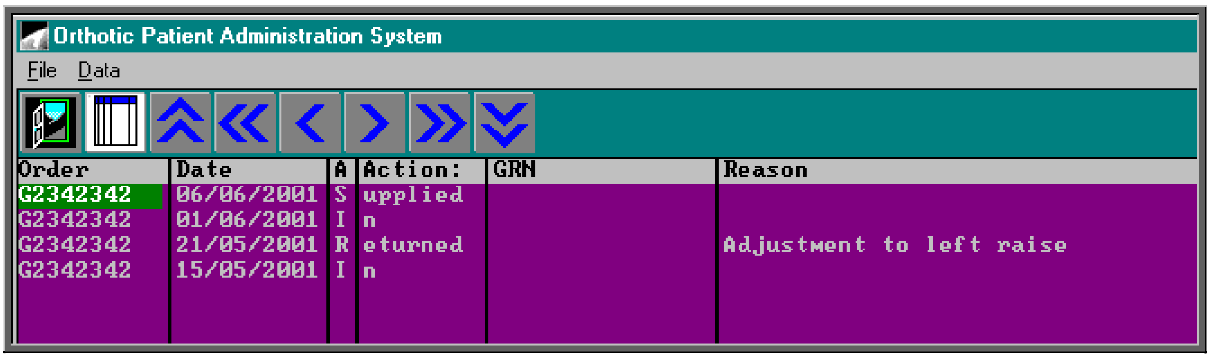
19. Progress

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.

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 show all actions carried out, and who carried them out.



Information recorded includes:

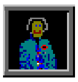
Ordered	Date order raised on OPAS
In	Date goods received. Includes delivery note number if given
Returned	Date goods returned. Includes goods return number and reason if given
Supplied	Date goods supplied to patient
Hold	Date order put on hold. Includes reason if given
Cancelled	Date order cancelled. Includes reason if given
Un-cancelled	Date order un-cancelled. Includes reason if given

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.

20. Jump to functions

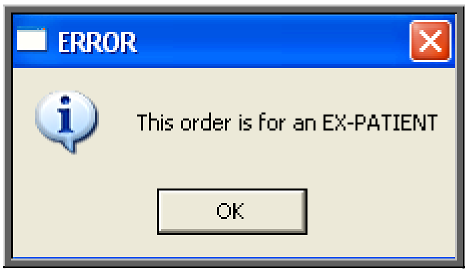
Menu: History – Orders or Menu: History – Invoices

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

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

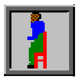
   Jumps to the patient record will only work where the patient is a current patient i.e. they have not been moved to Ex-patients. If a patient is an Ex-patient there name will be highlighted in red on the order/invoice.

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/invoice press the **Esc** key.

2) To jump to the appointment, click on the 'appointment' icon  (Goto, Appointment).

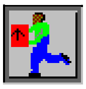
Jumps to the appointment will only work where the appointment is current i.e. it has not been archived. If you try to jump to an archived appointment, the following message will appear.

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

3) To jump to the care episode, click on the 'care episode' icon  (Goto, Care).

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

Having jumped to the care episode, press the **Esc** key to return to the order/invoice.

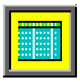
4) Whilst looking at an order or invoice you can access further information regarding it's Supplier by clicking on the 'supplier' icon  (Goto, Supplier).

This Supplier screen has the same functionality as if accessed through Utilities – Choices – History – Suppliers, in that you can access the supplier's prices or look at other orders for the supplier.

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

21. 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  (Analysis).

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

- 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.

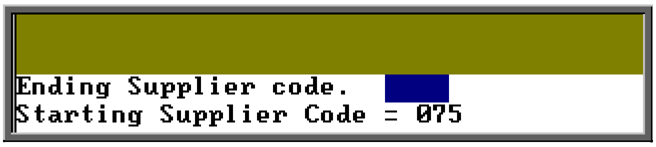
```
Ending Date:              /  /
Starting Date = 01/01/2000
```

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.



- If you want to analyse a range of suppliers, enter the last supplier code of the range.

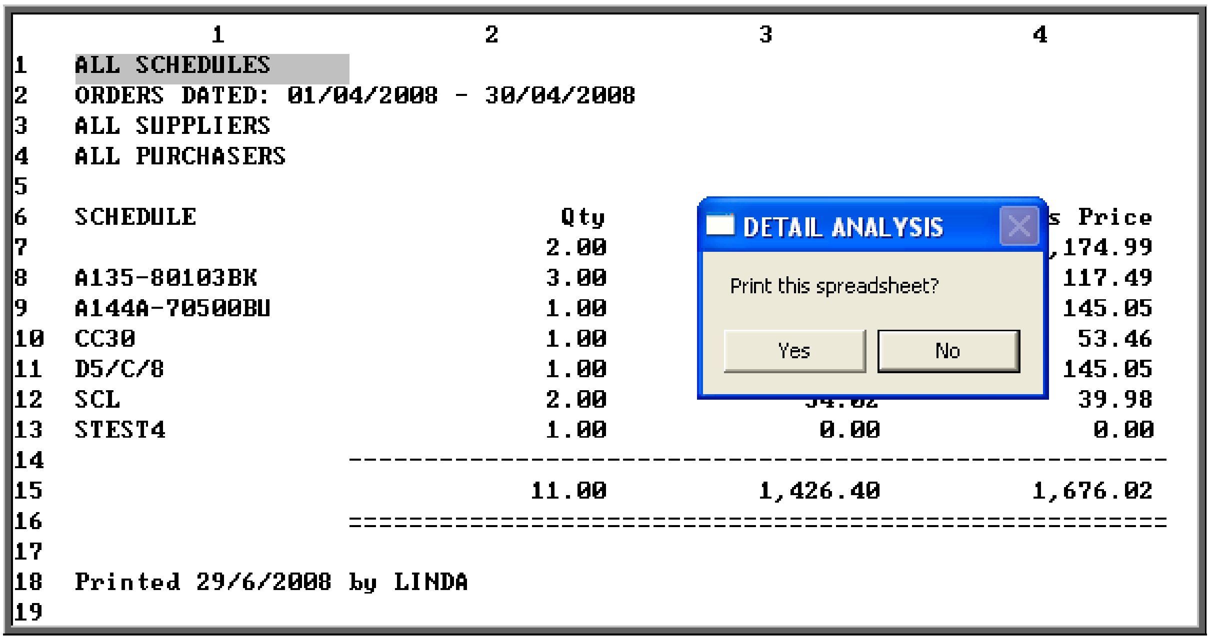
- If you want to analyse one supplier, enter that supplier code again.

Then you are asked for the Purchaser code.

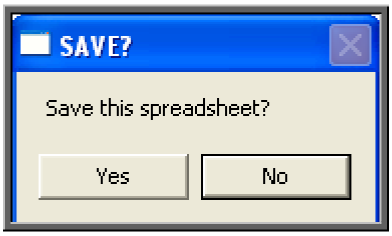
- If you want to analyse one purchaser, enter that purchaser code.

- 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.



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 (up to 8 characters long with no spaces or symbols).

This will then be saved as a comma separated variable file in the directory Q:\OPAS\(your user name) so that the file can be opened in Lotus 123 or MS Excel.

22. Multi-currency orders

Patient orders can be created for suppliers that trade in a foreign currency.

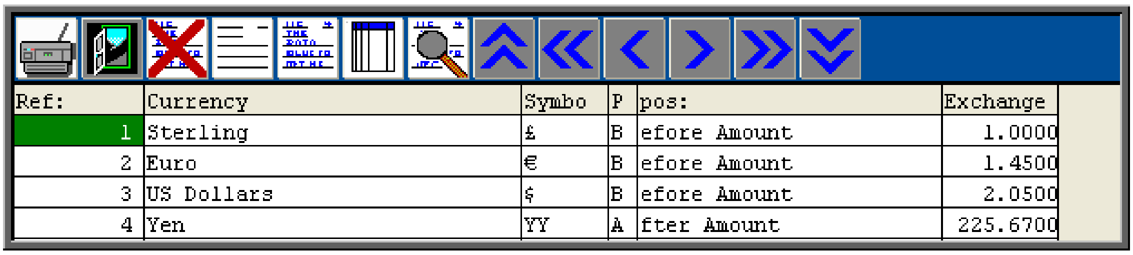
a) Setting up suppliers

Menu: Utilities – NSI – Suppliers

If you have a foreign supplier that invoices in a currency other than pounds sterling, then the supplier record needs to be marked with the appropriate currency.

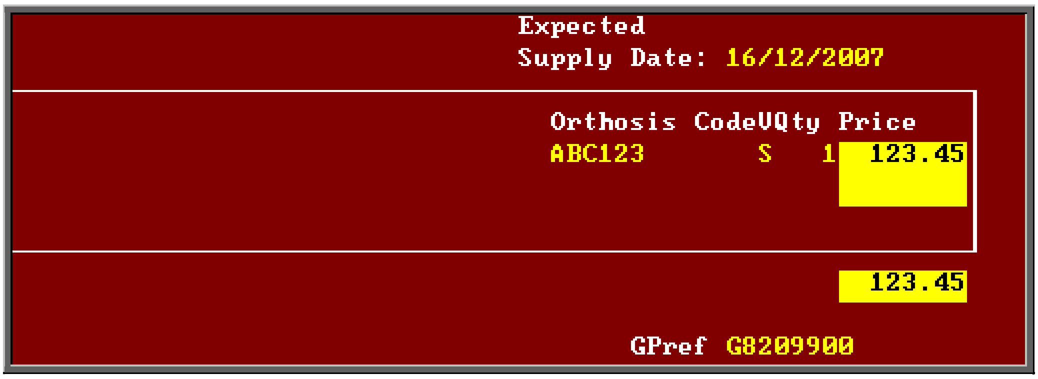
Select the *Currency:* from the pop-up list and the *Symbol* and *Exchange Rate* fields will populate automatically.

If you need to create more currencies or update exchange rates on current currencies, go to Utilities – Choices – History – Currencies.



b) Creating orders

Find the patient record and add an order in the usual way. The only difference is that when you enter the cost of the goods in the *Price* field. This should be entered in the currency of that supplier.



OPAS will recognise that the supplier trades in a foreign currency and will highlight the value of the goods/order in yellow as a reminder that the value is not in pounds sterling.

c) Printing orders

To show the correct currency values/symbols on the order, printing of orders has to be done through the 'instant print' option.

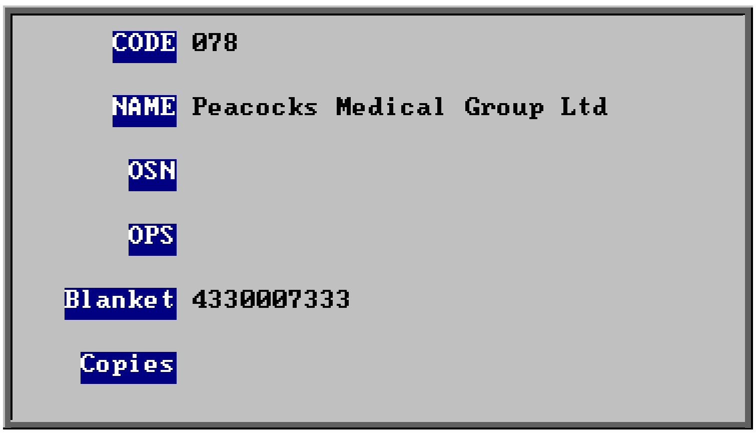
23. Blanket/call off numbers

Menu: Utilities – Choices – Finance – Accounts

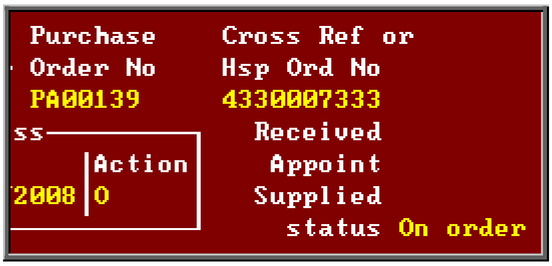
In order to keep your blanket numbers safe, they should be entered in the Accounts screen.

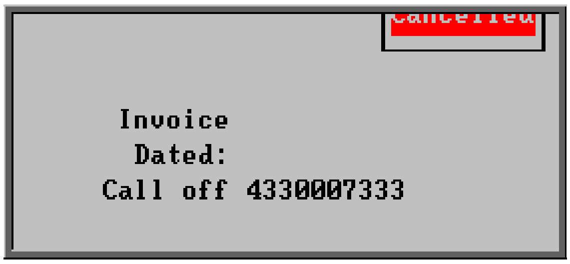
To add a blanket number to a supplier, click on the 'enter' icon  (Edit, Enter).

Select the relevant supplier from the pop-up list and move down to the *Blanket* field. The number can be up to 20 characters long.

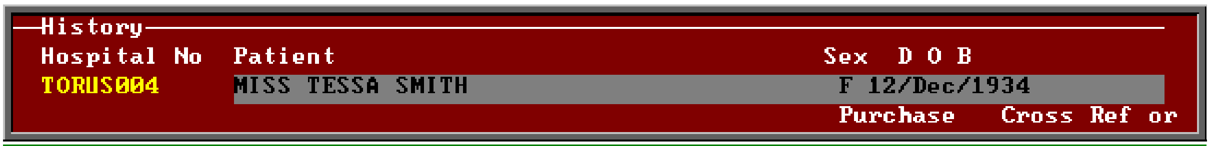


If a blanket number is entered for a supplier, this will appear automatically in the *Cross Ref* field on the patient Order screen, and the *Call off* field on the stock Purchase screen.





24. Deceased patients



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

The order can still be marked as received but the following message will appear.

If 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.

If you try and mark the order as supplied the message above will appear, and the *Supplied* date field will not be updated.

25. Archiving 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.

Whichever archive is been carried out, you should be the only user logged onto OPAS, and know that you have a recent back up. If you are unsure, check with your IT department.

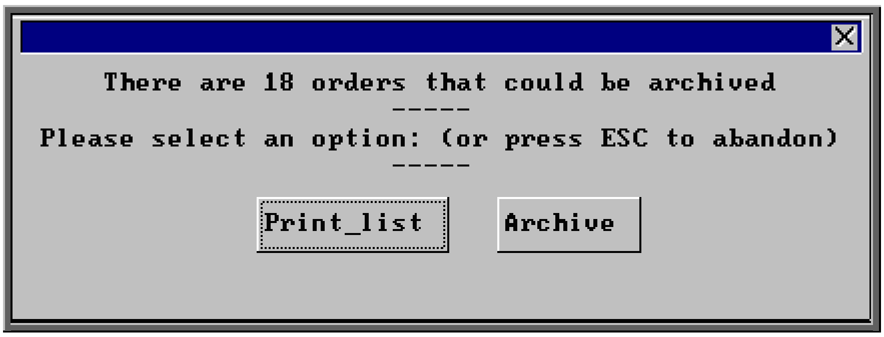
Option 1

Menu: History – Invoices

Once in the Invoices screen click on the 'archive' icon (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

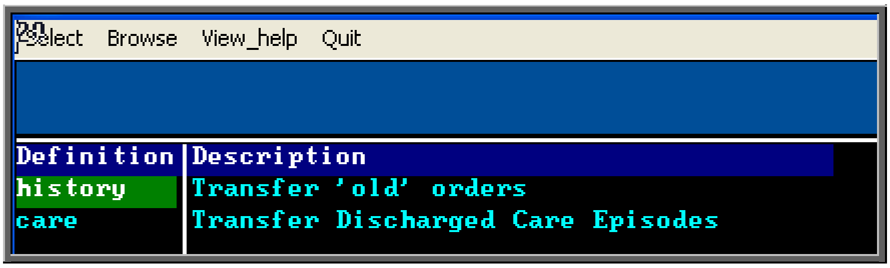
press **F10** twice

- select OK, and then Quit.

Option 2

Menu: History – Archive – Run

From this screen, options are available for archiving orders and care episodes.



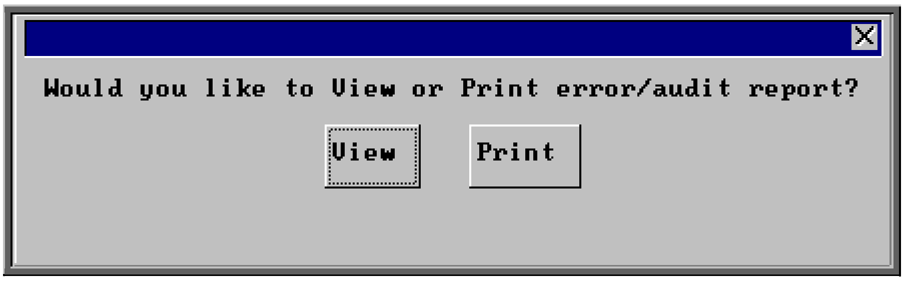
Ensure the history definition is highlighted and click on 'select' at the top of the screen.

OPAS needs confirmation that you definitely want to archive the old orders.

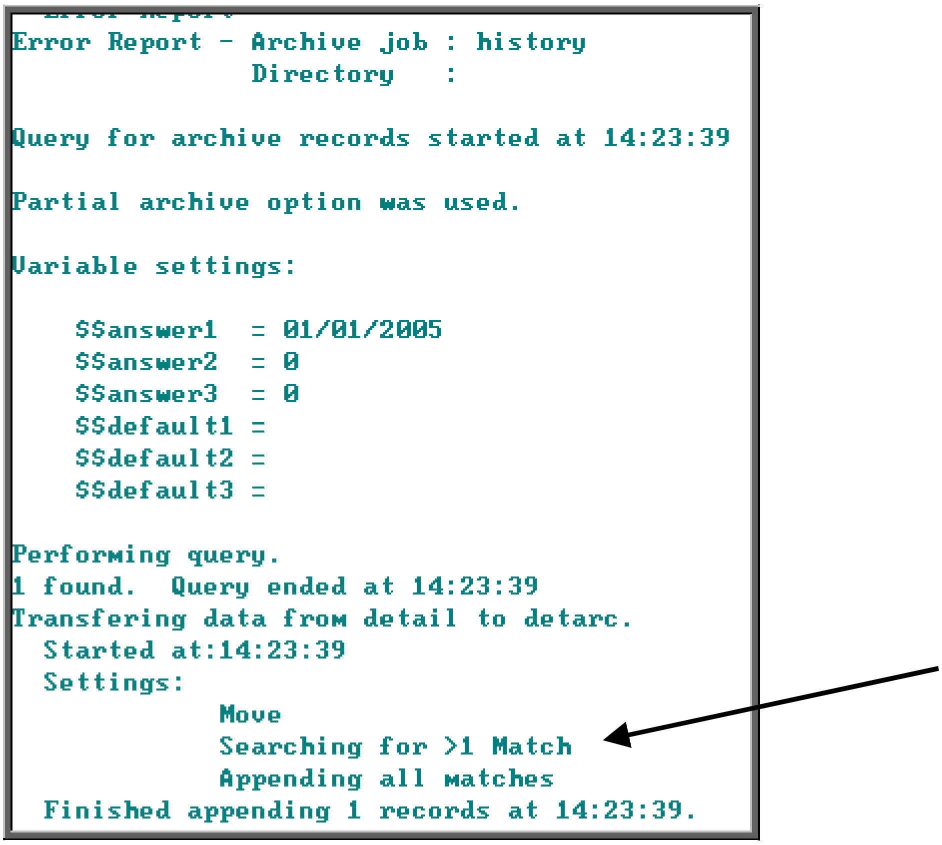
- Type in the date up to which orders should be archived
- Confirm that OPAS is backed up (if you are not sure, check with your IT department), by clicking with the mouse on the Yes button
- Confirm that you wish to continue by clicking with the mouse on the Yes button

Click on OK if you still wish to continue.

Once the query has performed, you will be asked if you wish to print or view the audit report. The report is generated automatically, but serves little purpose other than to show how many care episodes were archived.



Click on View if you wish to avoid wasting paper. Do not worry that the header says Error Report. The report will show how many orders have been archived.



Press **Esc** to clear the report from the screen.

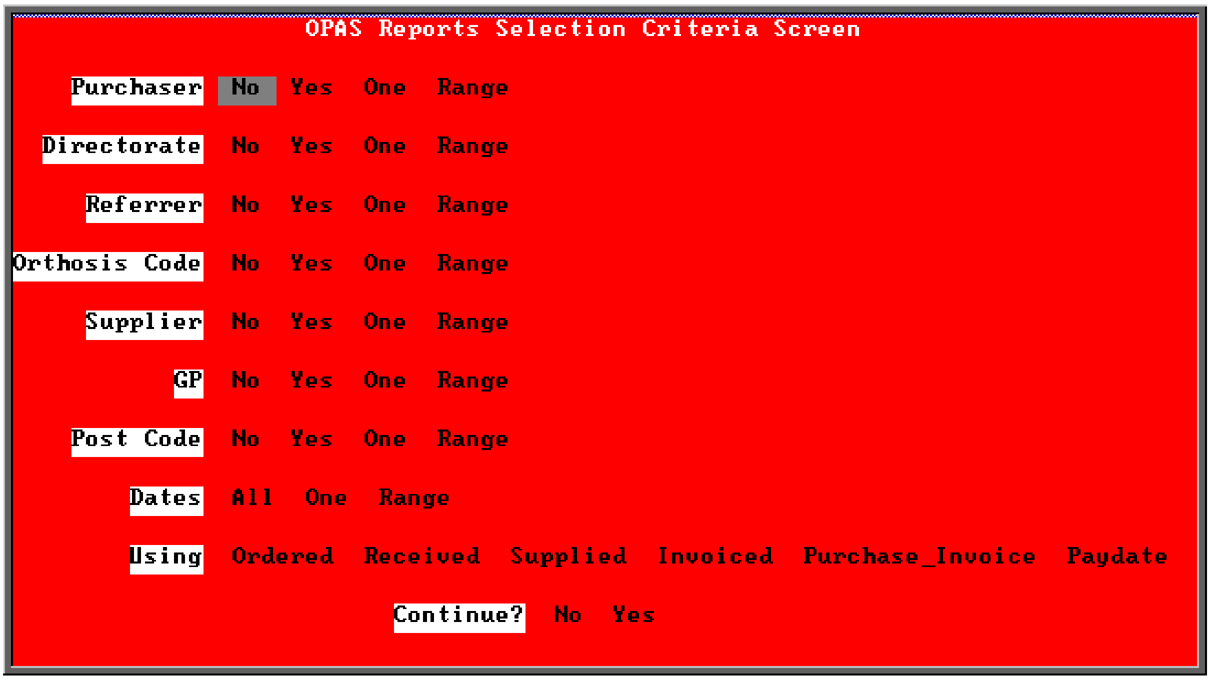
The orders have now been permanently removed from the current Orders database but can still be viewed by going into History – Archive – Orders, or by going to the Patients record and selecting Goto, History, Archived.

26. Reports – Ad hoc

Menu: Reports – Financial – Ad hoc or

Menu: History – Reports – Ad hoc

The Ad hoc report gives you the flexibility to report on specific order information by completing the selection criteria screen below appropriately.



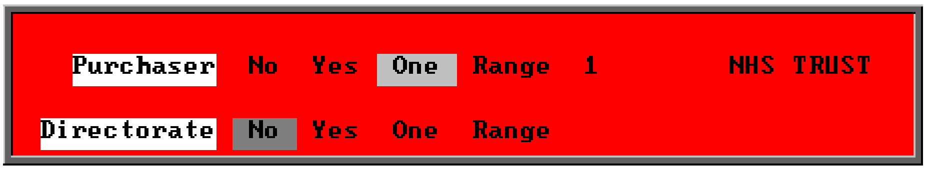
Purchaser

Select

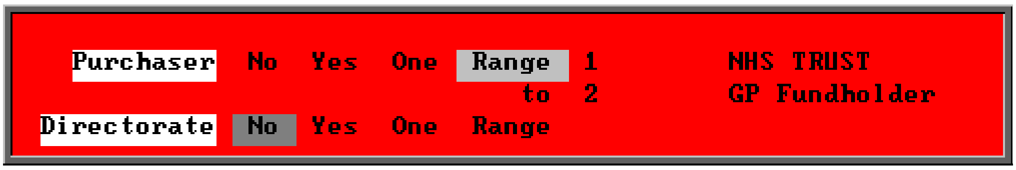
No — if all Purchasers are to be included in the report but you **do not** require a sub-total for each Purchaser

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

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.



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.



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

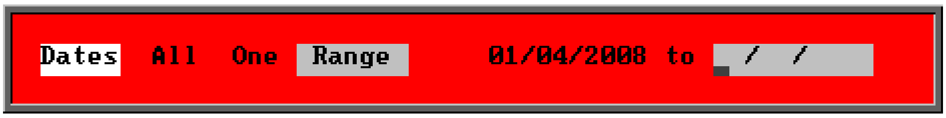
All if you want to report on all orders on OPAS.

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.

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 'end' date in the next space provided in the format DD MM YYYY and press **Enter**.



Using

Select

Ordered	if you want to report on those orders that have an order date within the dates selected above
Received	if you want to report on those orders that were received within the dates selected above
Supplied	if you want to report on those orders that were supplied within the dates selected above
Invoiced	if you want to report on those orders where the date of the suppliers invoice is within the dates selected above
Purchase_ Invoice	if you want to report on those orders where the date of the purchase invoice is within the dates selected above
Paydate	if you want to report on those orders that were the passed for payment date is within the dates selected above

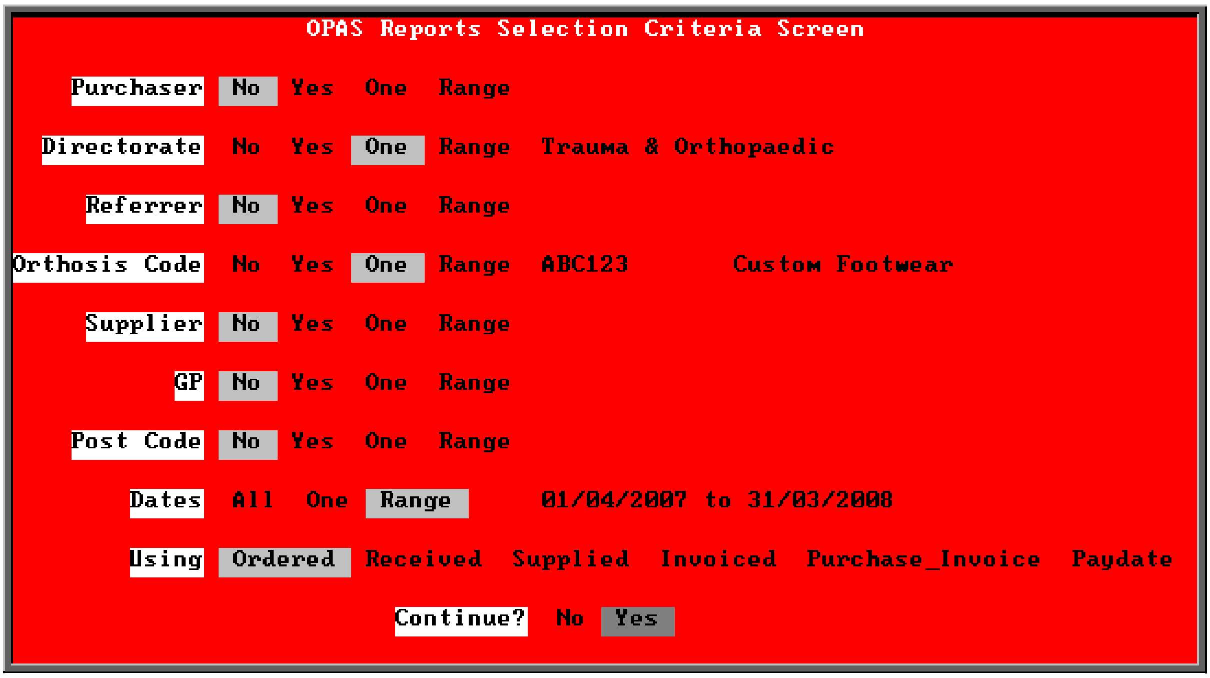
Continue

Select

No	if you wish to abandon the Ad hoc report screen

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.

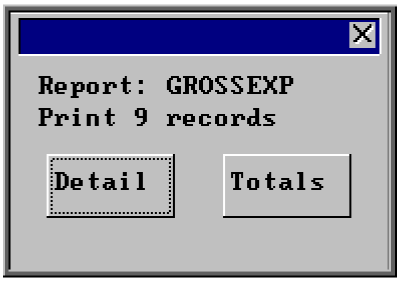


Once you have selected Yes to continue, OPAS will search for all those orders that match the criteria selected. If no matches are found, the following message will appear.

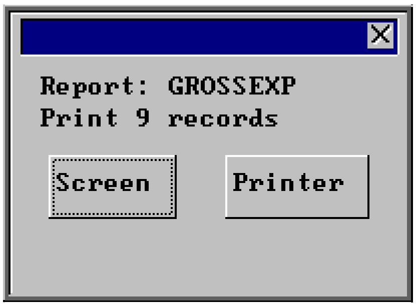
If orders have been found that match your criteria then this Reports menu will appear.

Gross Expenditure

If you wish to see the value of the orders including VAT, select Gross Expenditure.

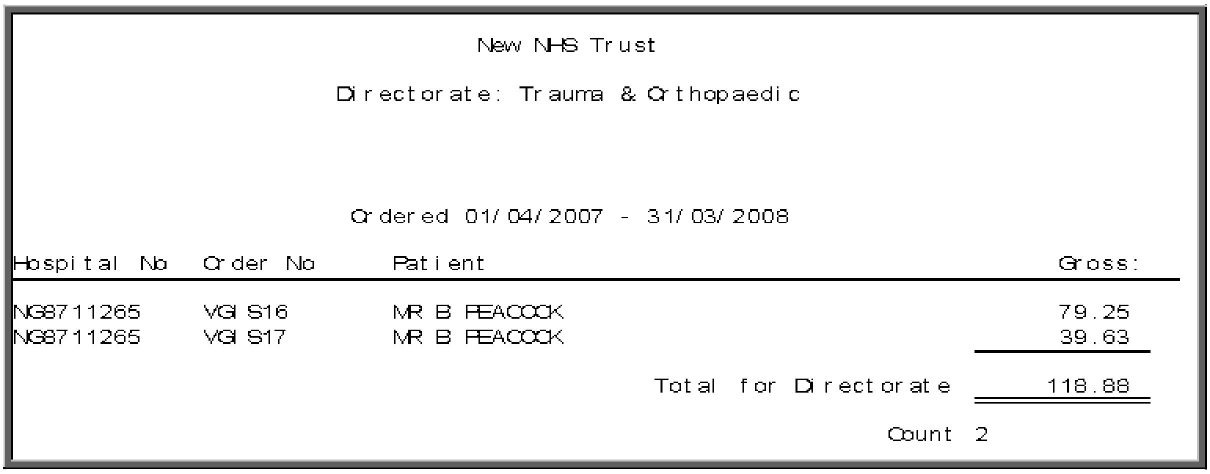


You will be shown how many orders OPAS has found and ask if you want to see the information in Detail i.e. a line for each order or just Totals



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.

Below is an example of the Gross Expenditure report selecting Detail.



New NHS Trust

Directorate: Trauma & Orthopaedic

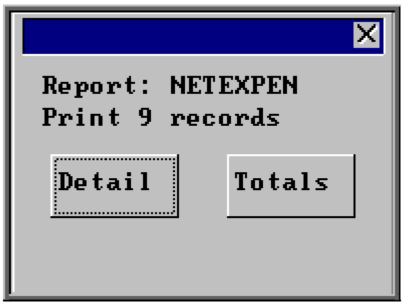
Ordered 01/04/2007 - 31/03/2008

Hospital No	Order No	Patient	Gross:
NG8711265	VGI S16	MR B PEACOCK	79.25
NG8711265	VGI S17	MR B PEACOCK	39.63
		Total for Directorate	118.88
		Count	2

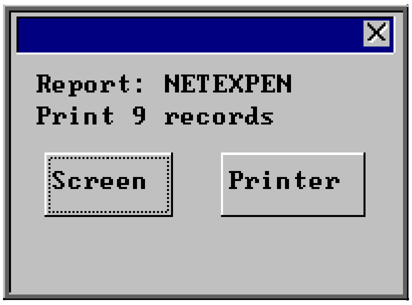
The report layout (grossexp.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

Net Expenditure

If you wish to see the value of the orders excluding VAT, select Net Expenditure.

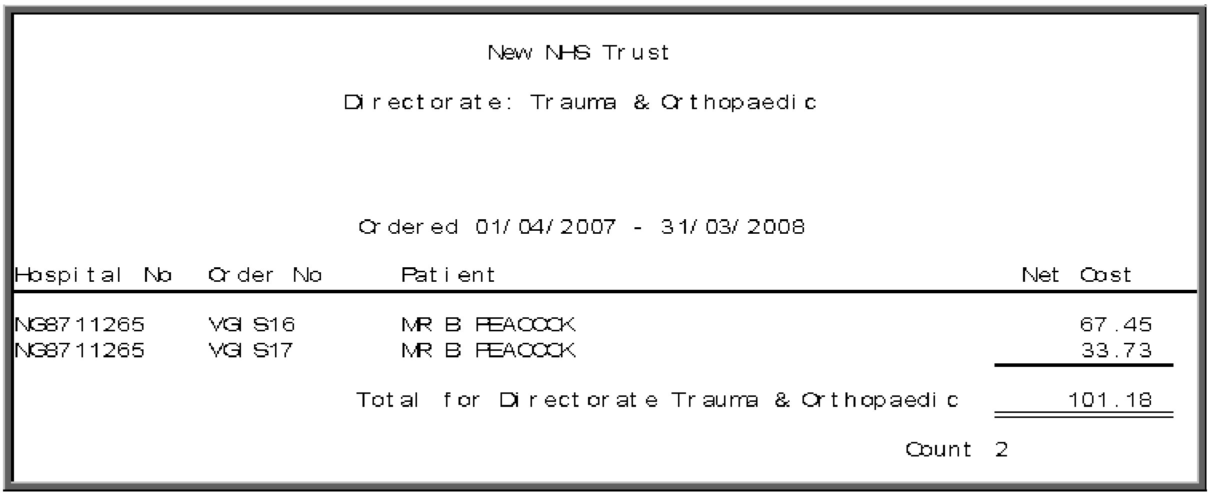


You will be shown how many orders OPAS has found and ask if you want to see the information in detail i.e. a line for each order or just totals



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.

Below is an example of the Net Expenditure report selecting Detail.



New NHS Trust

Directorate: Trauma & Orthopaedic

Ordered 01/04/2007 - 31/03/2008

Hospital No	Order No	Patient	Net Cost
NG8711265	VGI S16	MR B PEACOCK	67.45
NG8711265	VGI S17	MR B PEACOCK	33.73
		Total for Directorate Trauma & Orthopaedic	101.18
		Count	2

The report layout (netexpen.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

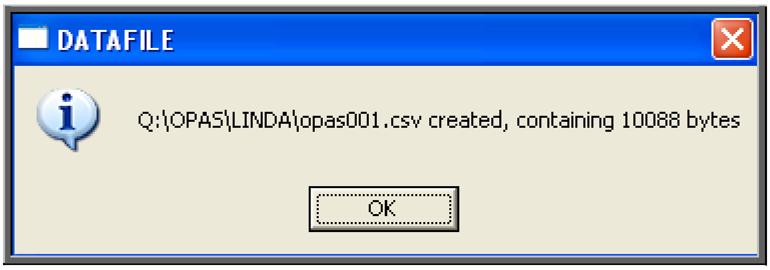
Datafile

The Datafile option saves the information found as a comma separated variable file so that the data can be exported into a spreadsheet for manipulation, or into a report.

Having selected Datafile, 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

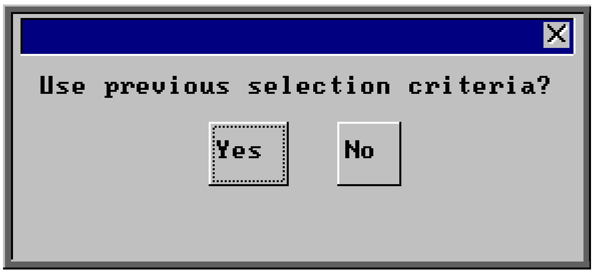


A comma separated variable file will be created in your personal directory.

The file name will use a counter so that the first time this is done the file will be saved as opas001.csv and then opas002.csv and so on. This can now be opened in Lotus123 or MS Excel.

	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.

27. Reports – Batches

Batch reports are report templates that are designed to be quick and easy to run. There are currently 28 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 24 to Note 51.

Users 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 be. 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. **Entering invoice details for foreign currency orders**
3. **Editing invoices**
4. **Passing invoices for payment**
5. **Creating a file for finance**
6. **Printing sundry debtor invoices**
7. **Archive**

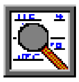
1. Entering Invoice Details

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  (Data, Find) and selecting the relevant search criteria (Order_No 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  (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  (Patients) to take you to the patient record, and then click on the 'history' icon  (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.

1. Processing invoices for internal purchasers

Hsp Ord No	a hospital number can be entered or edited
Sup Inv No	enter the supplier's invoice number
Invoice Date	date of the supplier's invoice entered in the format DD MM YYYY. This is mandatory field and you will not be allowed to continue until a date has been entered.
Received	date the item was received can be entered or edited
Supplied	date the item was supplied to the patient can be entered or edited
Purchaser	can be changed if required. Press Tab for a pop-up list of purchasers.
Clinician	can be changed if required. Press Tab for a pop-up list of clinicians.
Supplier Code	can be changed if required. Press Tab for a pop-up list of suppliers.
Orthosis Code	can be changed if required. Press Tab for a pop-up list of orthosis codes.

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.

Code	may be changed if required. Press Tab for a pop-up list of items
Description	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.

Orthosis Code can be changed if required. Press **Tab** for a pop-up list of Orthosis codes

(V)AT *V* 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 10. Choices – Finance - 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 12. Choices – History - 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.

Notes Any additional information can be entered here.

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

Invoice Date date of the supplier's invoice entered in the format DD MM YYYY. This is mandatory field and you will not be allowed to continue until a date has been entered.

Received date the item was received can be entered or edited.

Supplied date the item was supplied to the patient can be entered or edited.

Purchaser can be changed if required. Press **Tab** for a pop-up list of purchasers.

Clinician can be changed if required. Press **Tab** for a pop-up list of clinicians.

Supplier Code can be changed if required. Press **Tab** for a pop-up list of suppliers.

Orthosis Code can be changed if required. Press **Tab** for a pop-up list of orthosis codes.

Purch Inv Date 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. This field can only be updated if the order belongs to an external purchaser.

PIN 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 *PIN* this can be set up in Utilities – Choices – Defaults. Contact the Helpdesk for advice on the formula to be entered. This field can only be updated if the order belongs to an external purchaser.

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.

Code	may be changed if required. Press **Tab** for a pop-up list of items
Description	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
Orthosis Code	can be changed if required. Press **Tab** for a pop-up list of Orthosis codes
(V)AT	*V* shows the rate of VAT for that item, as **S** standard **E** exempt **Z** zero-rated **R** reclaim.
Nominal	if invoice information is being exported into financial software, a nominal code can be entered here. (see Utilities – Note 10. Choices – Finance - Nominal).
Qty	can be changed if required
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 12. Choices – History - 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

Fitting 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 12. Choices – History - Fitting).

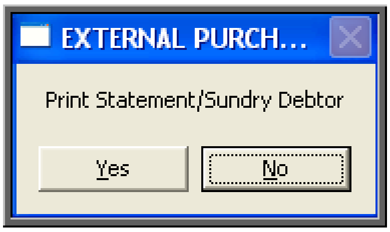
VAT is the sales VAT. Pressing **Tab** will enter the sales VAT if is applicable. Whether the purchaser is charged sales VAT is held against their purchaser record (See Utilities – Note 21. Choices - Purchasers).

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.

Notes Any additional information can be entered here.

Press **Ctrl-Enter** to finish.

If you have Instant Invoice switched on in the system parameters screen, and the order belongs to an external purchaser, you will be asked if you would like to print a sundry debtor invoice. (See Invoices – Note 6. Printing sundry debtor invoices)



Summary

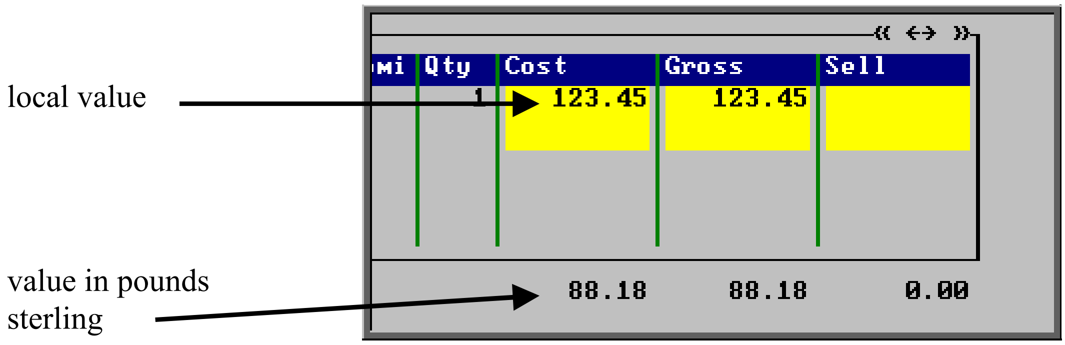
If you are amending the invoice details because you have received the supplier's invoice and you want to pass the invoice for payment, the three things you must do are:

- enter the supplier's invoice number (*Sup Inv No*)
- enter the invoice date (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.

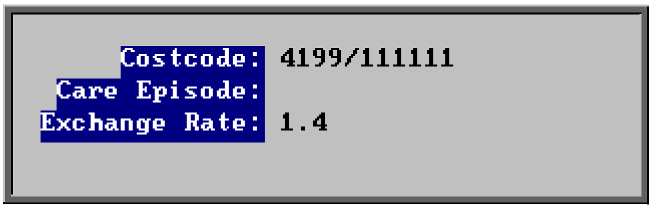
2. Entering invoice details for foreign currency orders

Passing invoices for suppliers that trade in a different currency to pounds sterling (£) is done in the usual way. The only difference is that the values in the *Cost* and *Gross* field are entered in the currency of that supplier.

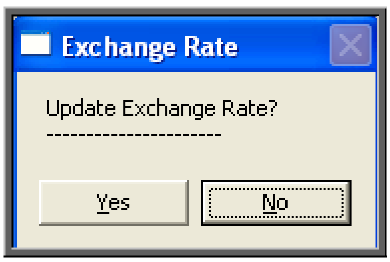
OPAS will recognise that the supplier trades in a foreign currency and will highlight the value of the goods in yellow as a reminder that the value is not in pounds sterling.



However, OPAS will convert the value of the order to pounds sterling, for reporting purposes. The exchange rate held on OPAS will be used to calculate the conversion. The rate used can be seen at the bottom of the Invoice screen.



If the exchange rate for that currency is subsequently changed in Utilities – Choices – History – Currencies, the invoice value and *Exchange Rate* on the invoice will not change. The invoice will hold the *Exchange Rate:* that was current at the time of invoice processing and remain so unless the invoice is edited. If the invoice screen is updated after the invoice has been passed you will be asked whether you wish the exchange rate to be amended or not.



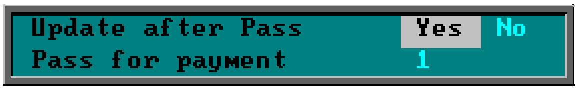
3. Editing invoices

Menu: History – Invoices

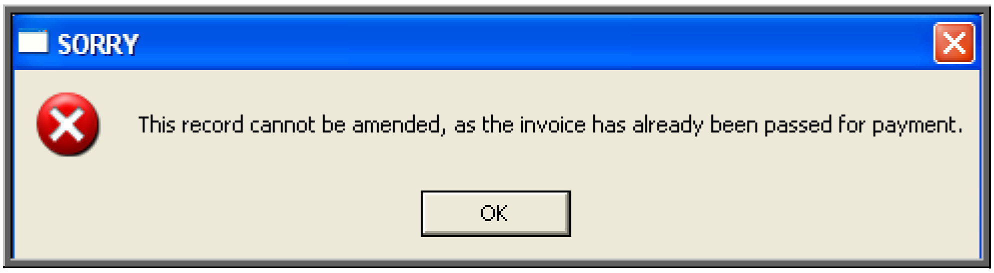
Find the invoice you wish to update by clicking on the 'find' icon  (Data, Find) and selecting the relevant search criteria (Order_No and Hsp_Ord_No are the most commonly used here).

Once you have found the invoice that you wish to alter, click on the 'update' icon  (Edit, Update) to be taken into the Invoices screen.

Note: Within the system parameters (Utilities – Choices – System) you have the option to set whether the Invoices screen can be edited after the invoice has been passed for payment.



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.



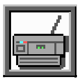
4. Passing invoices for payment

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:

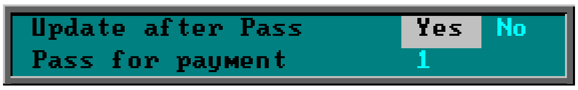
1. To produce a report listing those invoices that are being passed for payment.

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.

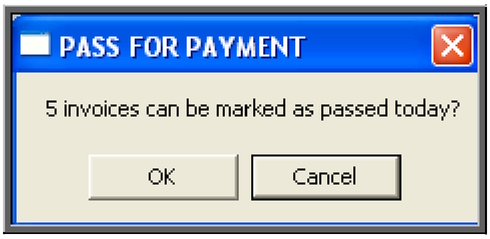
Menu: History – Invoices

Click on the 'print' icon  (File, Print) and select Pass for payment.

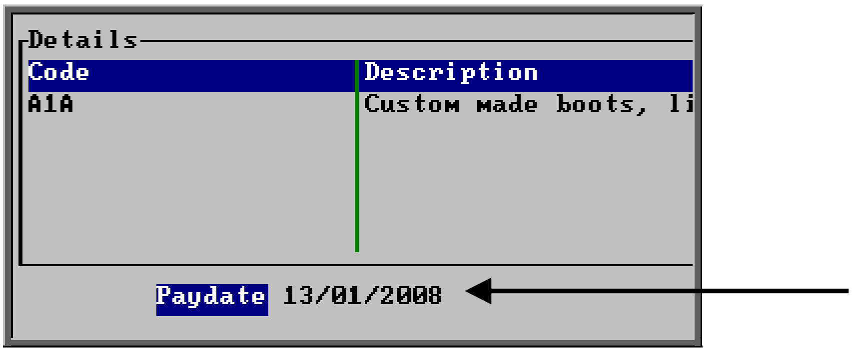
The system will then find those invoices that can be passed to the accounts department for payment (i.e. those invoices that have an invoice date entered and that have not been passed already) and prints a list of those invoices. As with all reports, the layout of this list can be modified if required. Within the system parameters (Utilities – Choices – System) you can set the number of copies of this report needs to be printed. If you do not wish to print this report when running pass for payment, enter a 0 in this option.



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.



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.

5. Creating a file for finance

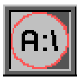
When invoices are passed to the Finance Department for payment, you also have the ability to produce a file. This file, containing information about the invoices, can then be imported into their finance software. This will save them having to re-key all the information that you have already entered once 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)

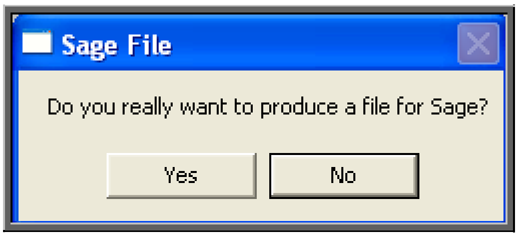
If finance are using a different software package to Sage we will need to configure OPAS to be able to create the file in the required format. Once this has been done, a file can then be produced following the instructions for Option 2.

Menu: History – Invoices

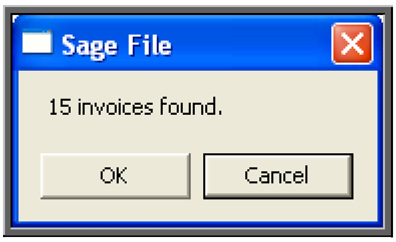
Option 1 – Producing a file for Sage

Click on the 'sage' icon 

(Sage).

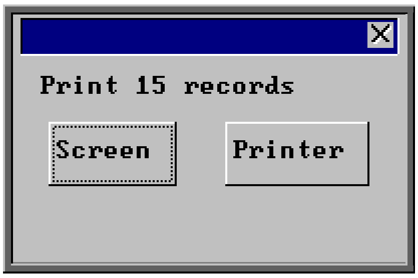


If you wish to continue, click on Yes. OPAS will then search for those invoices where the Supplier Invoice has been recorded since you last produced a file for Sage. Pass for payment does not have to be run in order to produce the file.



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.

You will be given the opportunity to print a summary report of the invoices included in the Sage file.



Choose the appropriate option, or press **Esc** to continue.

The above message will inform you of the name of the file and where the file has been saved. This file can then be

- 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.

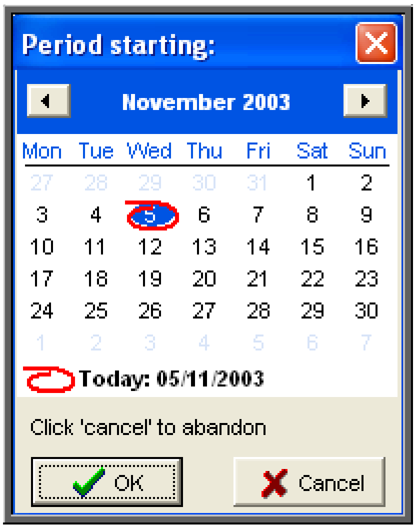
Option 2 – Producing a file for a financial system other than Sage

N.B. Before you follow the steps below, you must have run Pass for payment for those invoices you wish to be included in the file. (see Invoices - Note 4. Passing invoices for payment)

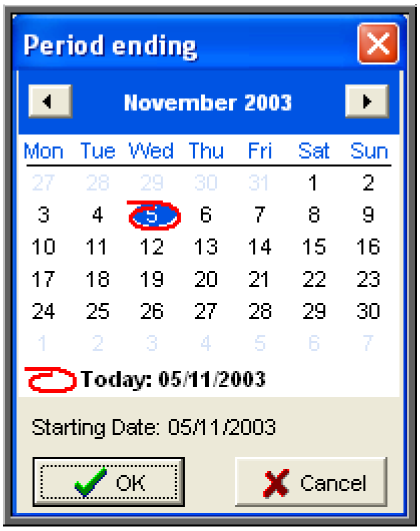
Click on Finance at the top of the screen.

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 file 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 in a file 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.

A comma separated variable file (Finance.csv) will be created in your personal directory.

This file can then be

- 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.

Note: The next time the Finance option is run, the file produced will be saved in the same place and overwrite the previous one. If you wish to keep copies of the finance files produced, you would need to take a copy of the file or rename it.

6. Printing sundry debtor invoices

Menu: History – Invoices

Sundry debtor invoices to external purchasers can be

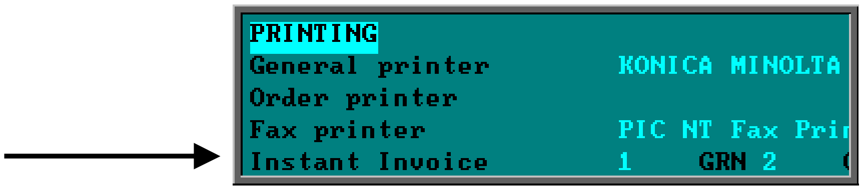
ii. printed individually as you update the Invoices screen (automatically)

iii. printed individually (manually)

iv. printed in batch

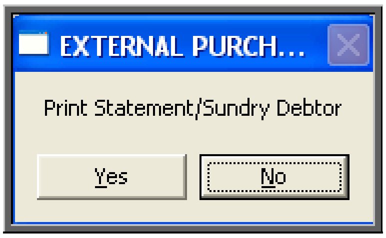
a) Printing individually as invoice details are entered (automatically)

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.)

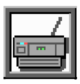


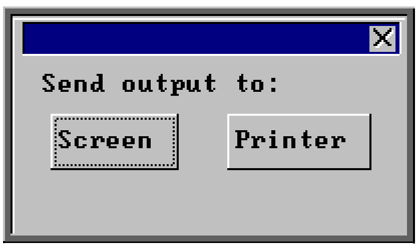
Select No if you do not wish to print the sundry debtor invoice at this stage. You can print it manually at a later time if required.

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.

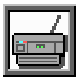
b) Printing individually (manually)

Find the invoice you wish to print and click on the 'print' icon  (File, Print) 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  (File, Print) and select **Batches** from the print menu. Then select **Statements** from the batches menu.

- 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 report will be automatically sent to the printer, listing those invoices where the *Purch Inv Date* is between the date range entered.

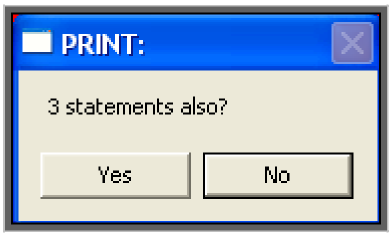
Below is an example of the Statements report.

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	£302.00
					Total for Mr Surgeon	£302.00
					Count 1	

The report layout (bat_stat.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

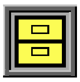
Then you will have the opportunity to print those invoices by selecting Yes to the following prompt.



7. Archive

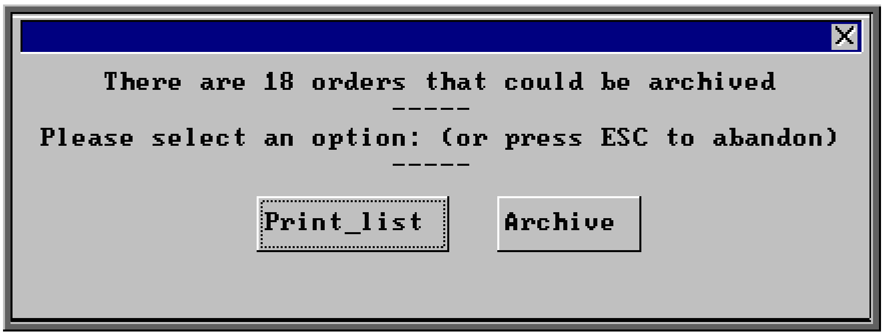
Archive will look for those order that are more than 18 months old and where there has been no invoice.

Menu: History – Invoices

Once in the Invoices screen click on the 'archive' icon  (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

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

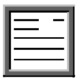
Venues is the first screen that you must set up when starting to use the Appointments section of OPAS. It is not until the system knows where and when your clinics are held that it can create clinic dates for you to allocate appointments to.

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.

a) Creating a new venue

Menu: Appointments – Venues

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

Reference	is assigned automatically and cannot be changed
Clinic	enter four lines of address for the clinic. The first line should be unique and identify the clinic, since only that line shows in pop-up menus from which the clinic is selected
Phone:	enter the clinic's phone number
Fax:	enter the clinic's fax number

Delivery Address six address lines are available if goods are to be delivered to an address other than the clinic address

Service: a service can be assigned to a venue

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.

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

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

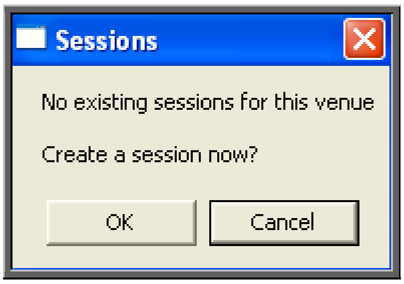
Information entered here can be included on the collection letters.

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

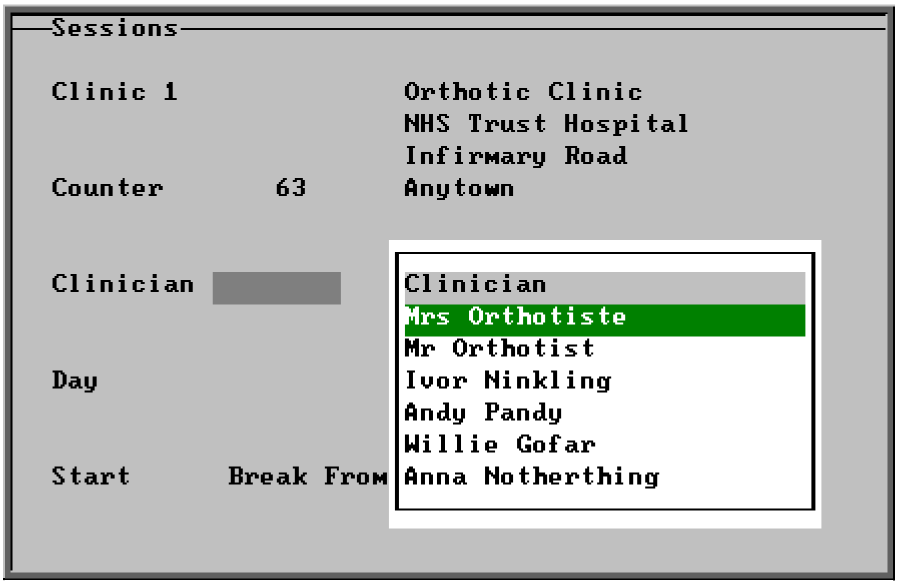
Appoint: a default appointment letter can be assigned to a venue. If this is left blank, the users default letter will be selected when making appointments.

Instant: enter Y if you wish to instant print appointment/collection letters for this venue.

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
1st day monthly	i.e. the first Monday of the month
2nd day monthly	i.e. the second Monday of the month
3rd day monthly	i.e. the third Monday of the month
4th day monthly	i.e. the four Monday of the month
5th day monthly	i.e. the fifth Monday of the month

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

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

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

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

Break To enter the end time of the break if required

End enter the end time of the session (in 24-hour notation, e.g. **0930**)

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 table.

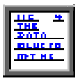
Sessions

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

b) Editing a venue

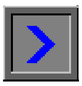
Menu: Appointments – Venues

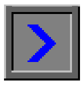
Find the venue that you wish to change.

If you wish to change information in the top part of the screen click on the 'update' icon  (Edit, Update).

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.

To update the session, use the 'right arrow' icon  (**F6**) find the session to be edited. Click on the 'update' icon  (Edit, Update), and make the necessary changes.

To delete a session, use the 'right arrow' icon  (**F6**) find the session to be deleted. Click on the 'delete' icon  (Edit, Delete). To activate a deleted session, simply click on the 'delete' icon  (Edit, Delete) again.

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. Viewing/Amending clinic dates). If there are a lot of sessions to be changed, contact the OPAS Helpdesk for advice.

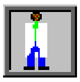
3. Creating clinic dates

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.

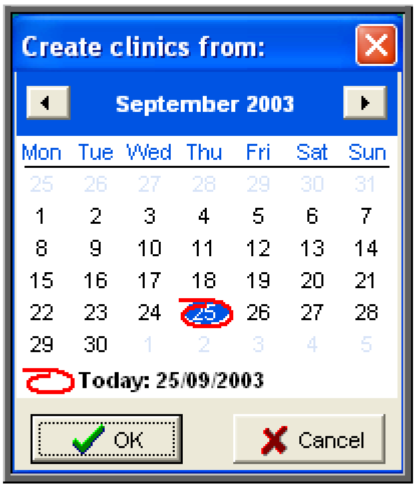
Click on the 'clinician' icon  (Session).

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

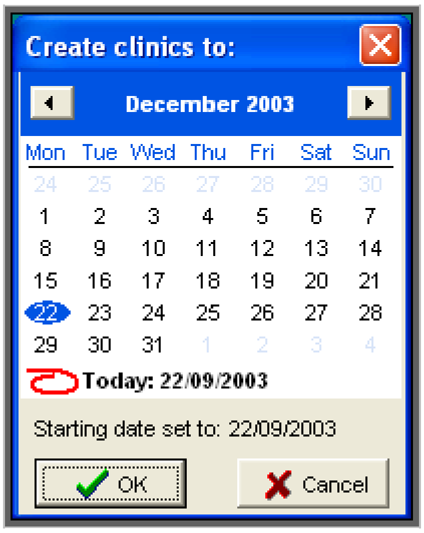
(If you do not want to create clinic dates for all sessions, click on No and follow the instruction in *b) Creating clinic dates for individual sessions*)

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.

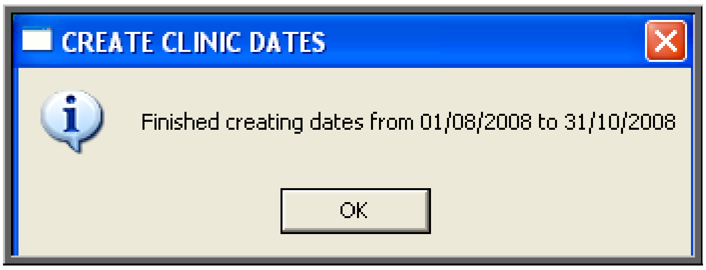


Having selected the 'to' date, press Enter (click on OK). OPAS will now create the clinic dates.

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.

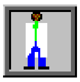
Select the appropriate date and OPAS will continue to create clinic dates, and when it has finished you will be notified.

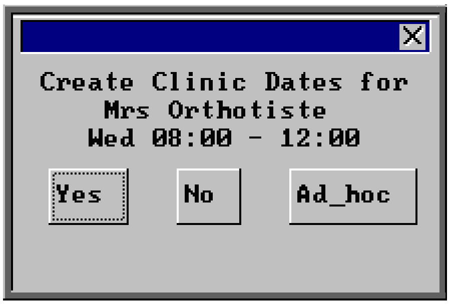


b) Creating clinic dates for individual sessions

Menu: Appointments – Venues

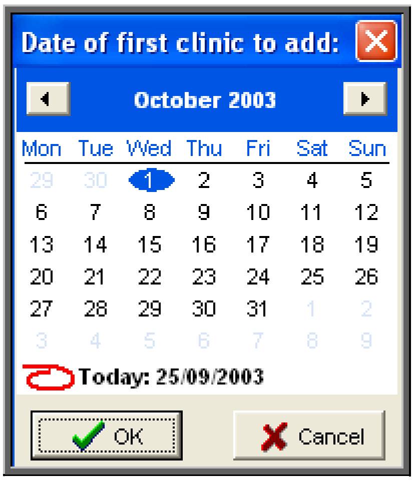
Find the Venue that you wish to create clinic dates for.

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  (Session).

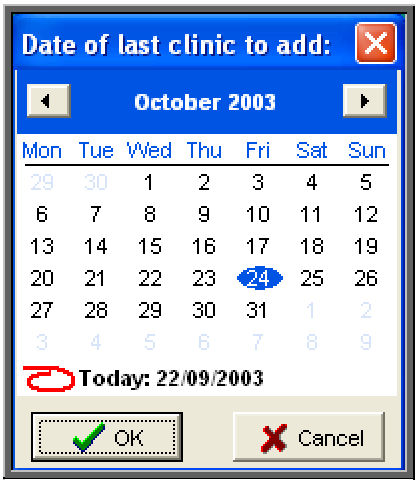


Select Yes to continue.

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.

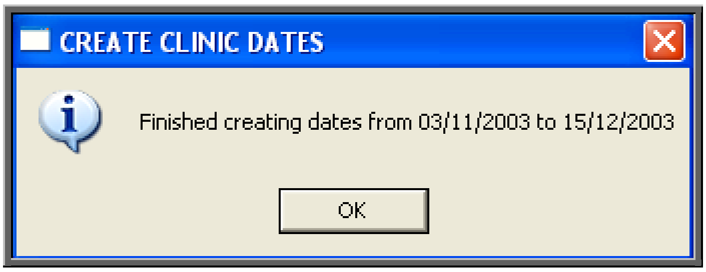


You will then be asked for the date of the last clinic to be created. We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS. Making clinic dates 3 to 6 months into the future would be ideal.



Having selected the ‘last clinic’ date, press **Enter** (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.

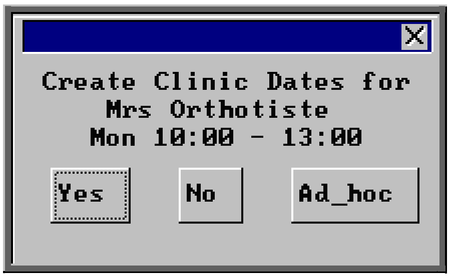
c) Creating ad-hoc clinics

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 (Session).

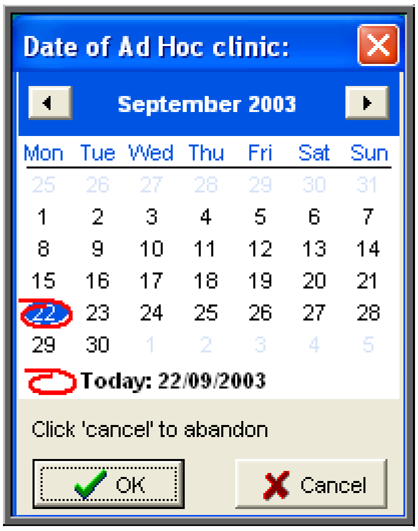


Select Ad_hoc to continue.

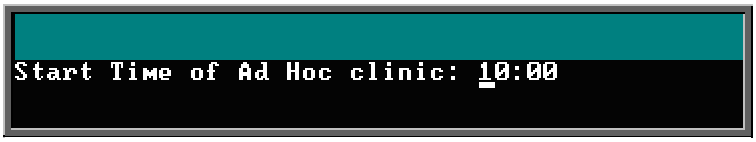
You will be asked to confirm that the ad-hoc clinic you wish to create is for the Clinician selected.

Select Yes to continue.

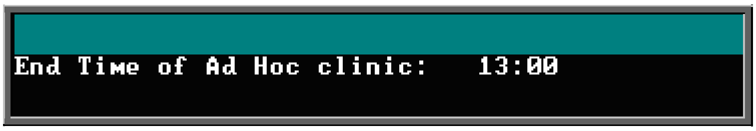
A calendar will appear in the middle of the screen to select the date of the ad-hoc clinic you wish to create. It will default to today's date, but this can be changed to the date required.



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



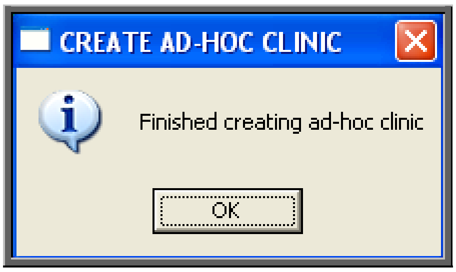
the time it will finish;



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

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

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



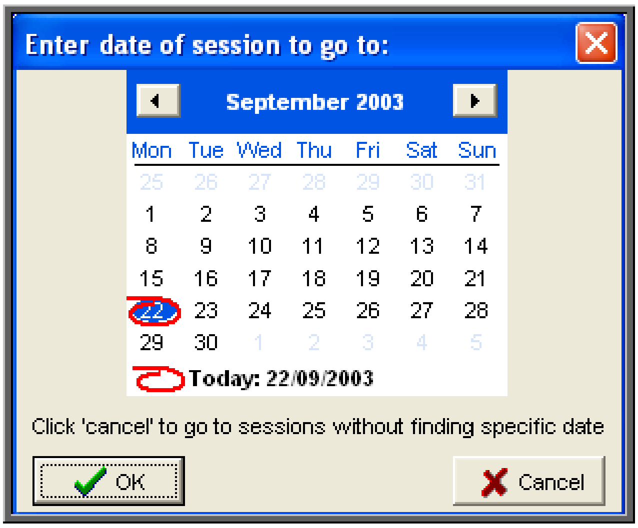
4. Viewing/Amending clinic dates (sessions)

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

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

Option 1

Menu: Appointments – Current – Sessions



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

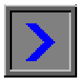
The date will default to today's date, and if you press the **Enter** key (click on OK) you will be taken to the first session for today. Alternatively you can select a date of your choice and press the **Enter** key (click on OK). Either way the rest of the sessions will be in date order.

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  (**F6**).

Then click on the 'clinics' icon  (Goto, Clinics).

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  (Data, Find) and select Date from the options at the top of the screen.

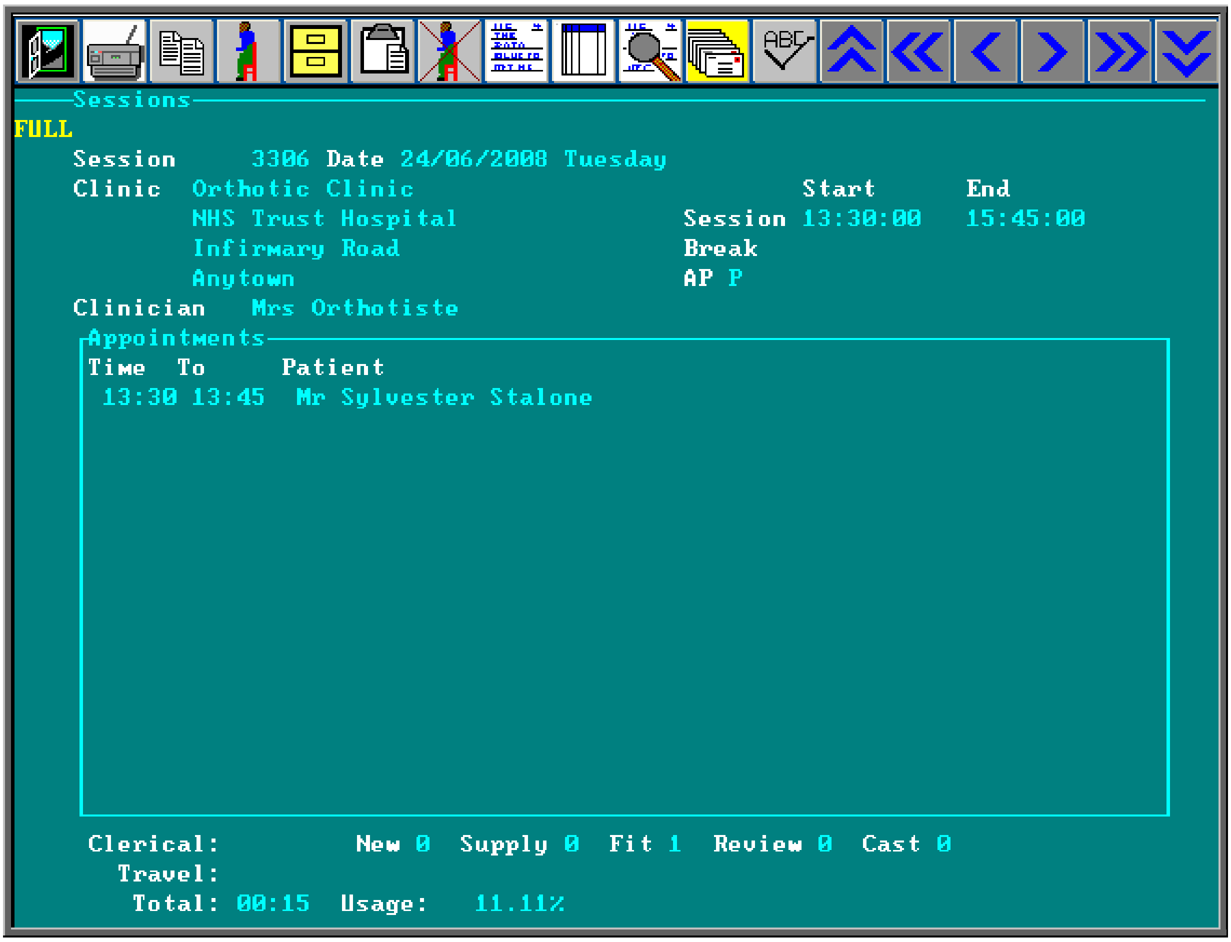
At the bottom of the screen type in the date you are looking for and press **Enter**.

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

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

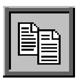
The Sessions screen

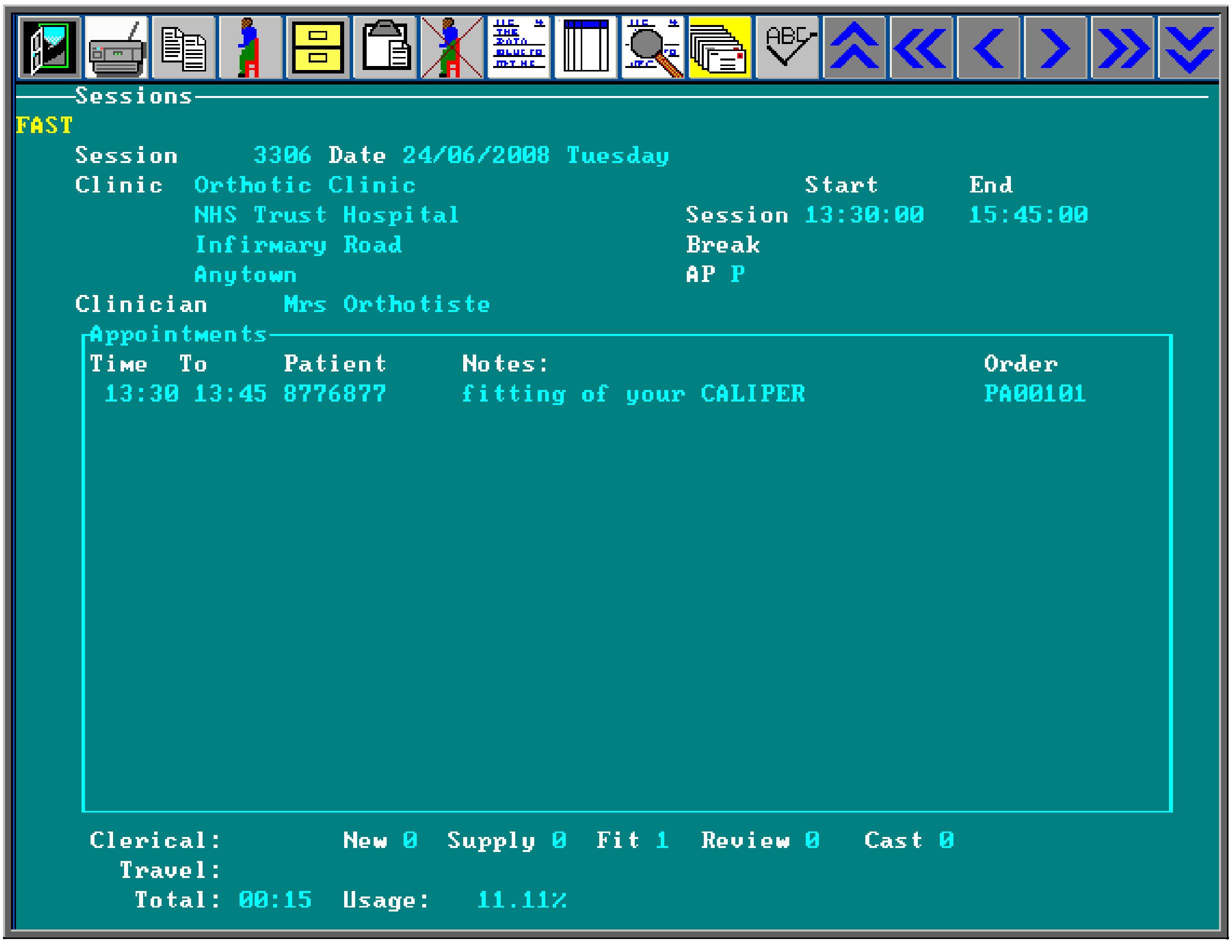
Once you reach the Sessions screen (using either Option 1 or Option 2 above) the screen usually looks like this:

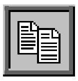


This is what we refer to as the **FULL** Session screen. This is indicated by the word FULL in the top left corner of the screen.

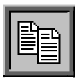
In order to speed up the time taken to go initially into the Sessions screen and the time taken to move between sessions, we have added a File Swap option. This will work in the same way as the File Swap facility in the Patient screen.

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



By clicking on the ‘swap’ icon  (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  (File, Swap).

Editing sessions

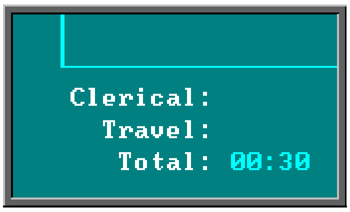
If the details of a clinic change permanently, then this change of information must be recorded in the Venue screen (see Appointments – Note 2. Venues), so that when clinic dates are created in the future they will be built on the correct information. If, however, after creating the clinic dates, the 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  (Edit, Update).

You then have the ability to change the

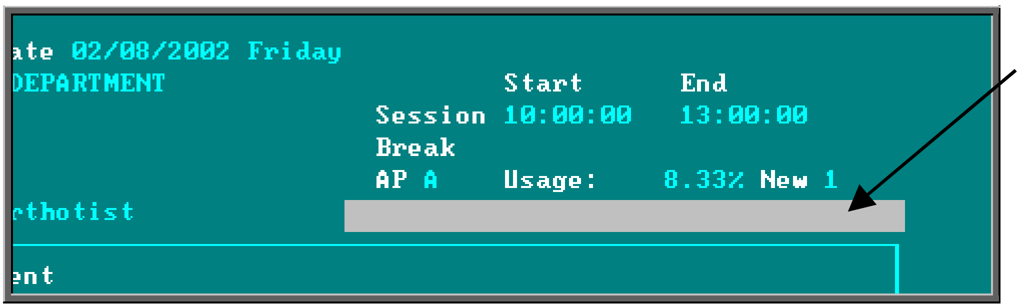
Start time
End time
Break times
Date
Clinician

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

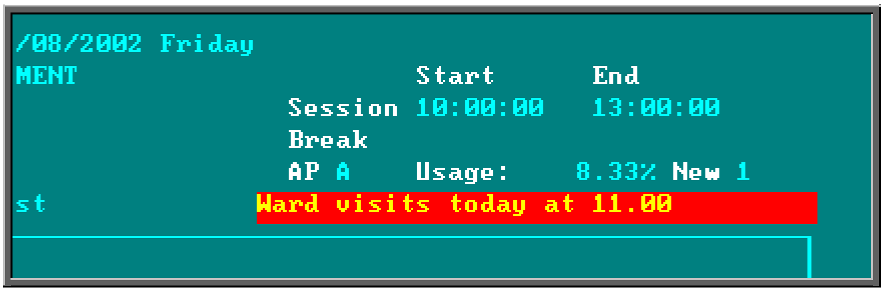


The *Total* field will add together the appointment times and any entries in the *Travel* and *Clerical* field to give the whole time spent at the clinic.

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



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

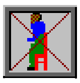


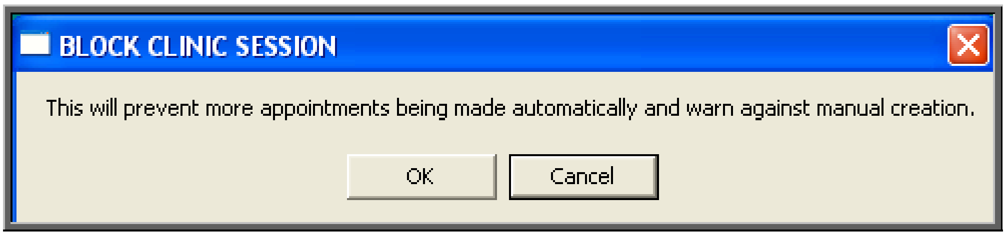
Once you have finished updating the session, press **Ctrl-Enter** to save the changes.

5. Blocking clinic dates (sessions)

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

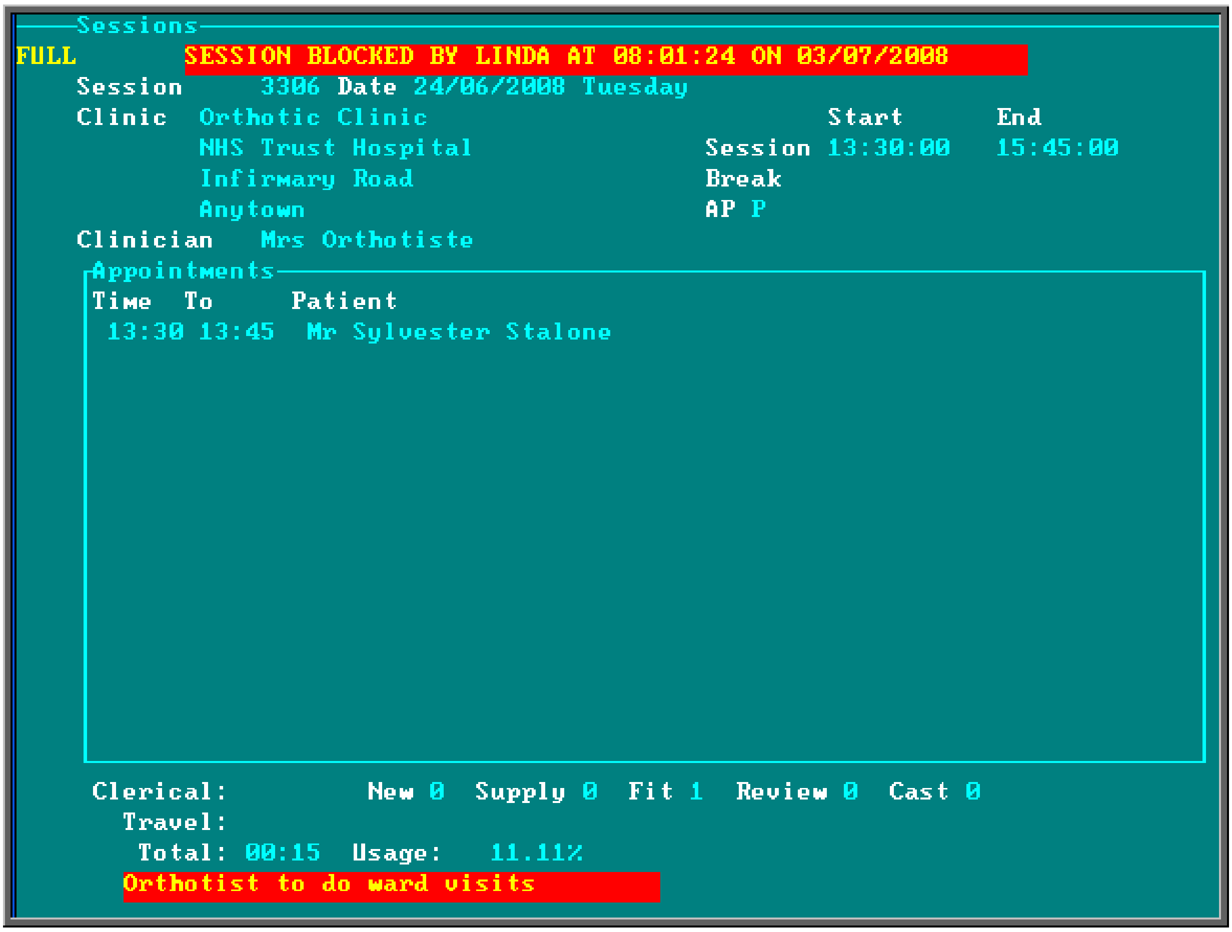
Menu: Appointments – Current – Sessions

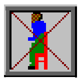
Find the session you wish to block and click on the 'block' icon  (Block).

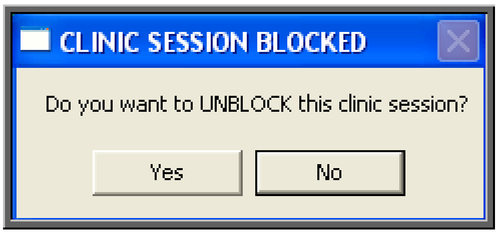


To continue, click on OK, and at the bottom of the screen type the reason (up to 35 characters) why the session is being blocked.

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



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

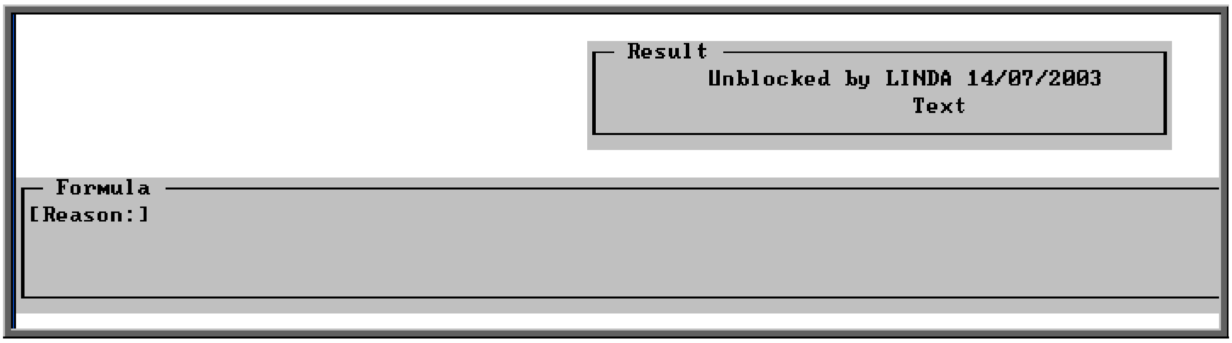


Once a session is unblocked, all the red block banners disappear leaving the session open for making appointments. If you are looking at a session that you believe was previously blocked, you can find out who unblocked the clinic and when by following the instructions below.

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

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

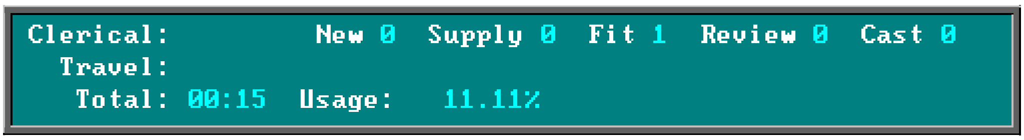
The answer will then be shown in the result box.



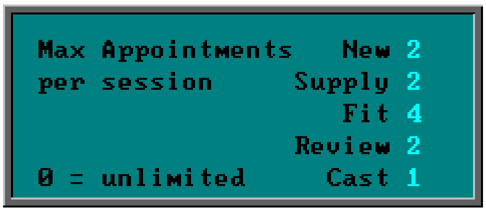
Once you have finished, press the **Esc** key to abandon the calculator option.

6. Limiting the number of appointments per session

When appointments are created, they can be categorised as being a New, a Fitting, a Supply, a Review or a Cast 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.



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.



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

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

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

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 not be cancelled. If a session is no longer going to run, any appointments that have already been booked for the session need to be cancelled individually (see Appointments – Note 13. Cancelling appointments). The clinic can then be blocked to prevent further appointments being made.

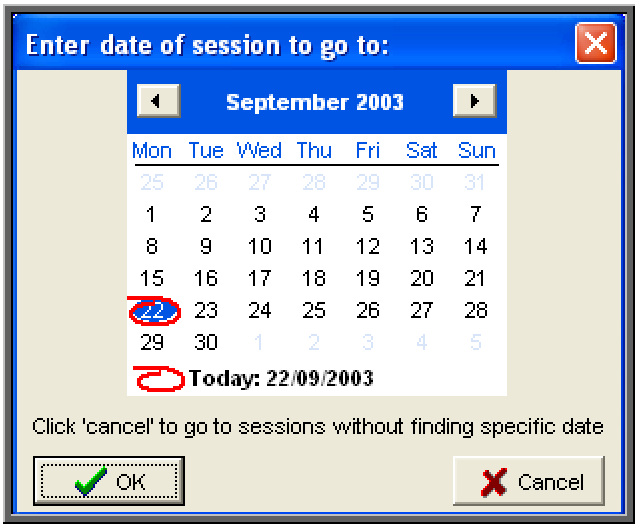
8. Allocating appointments manually

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.

a) Making manual appointments via the Sessions screen

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.

Menu: Appointments – Current – Sessions

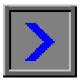


A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

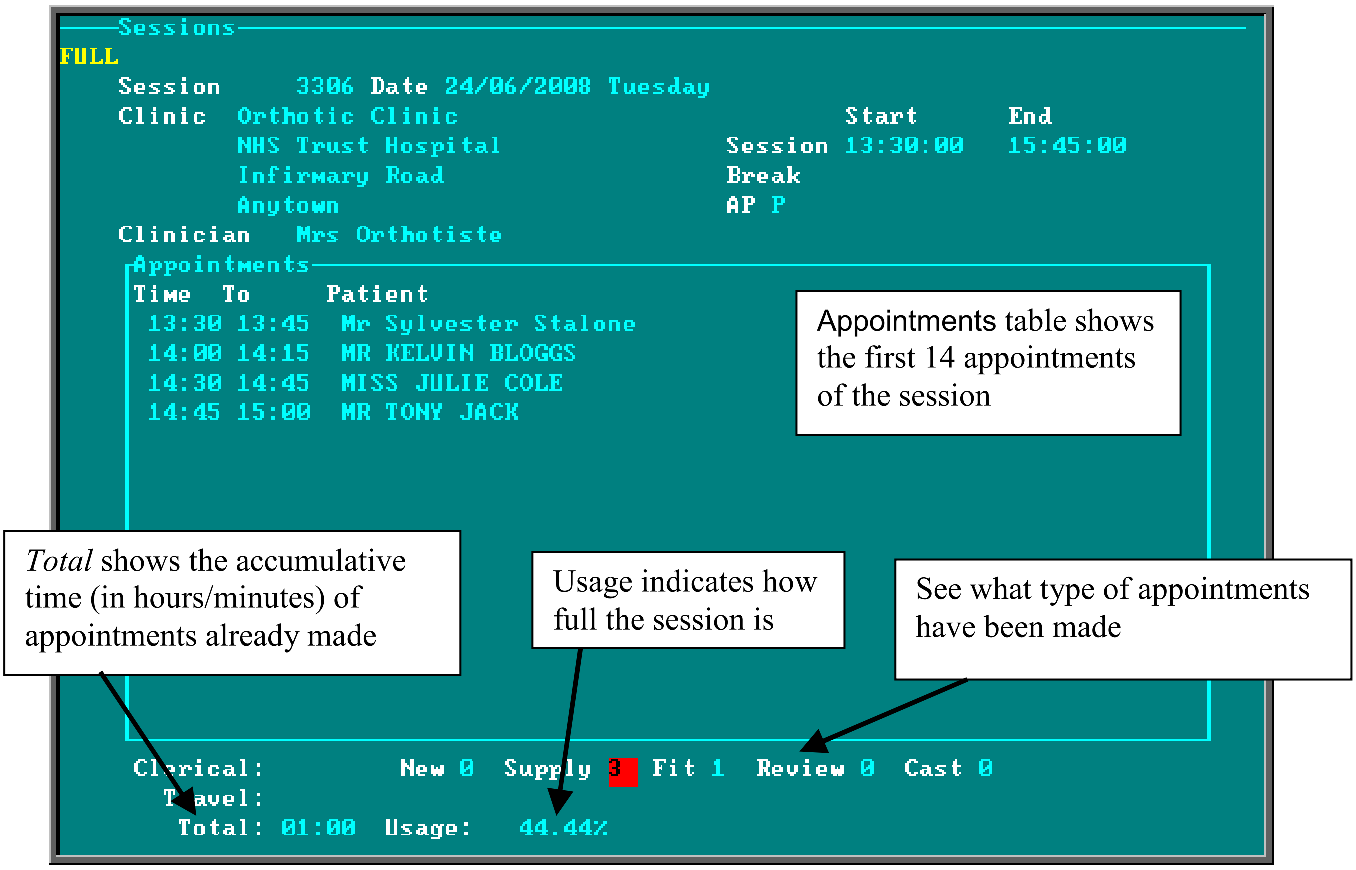
The date will default to today's date, and if you press the **Enter** key (click on OK) you will be taken to the first session for today. Alternatively you can select a date of your choice and press the **Enter** key (click on OK). Either way the rest of the sessions will be in date order.

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  (**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.



- 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.

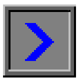
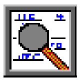
  To return to the main screen press **Alt-R**, or click anywhere on the screen (where there is not a table) with the mouse.

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

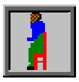
N	for new
S	for supply
F	for fit
R	for review
C	for casting

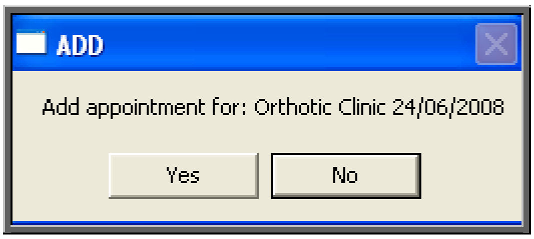
  This information is then displayed at the bottom of the Session screen, so at a glance, you can see how many of each type of patient is booked in for that session.

  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  (**F6**) or search for an alternate date using the 'find' icon  (Data, Find).

Making the appointment

Once you have found the session you wish to make an appointment on, click on the 'appointment' icon  (Appointments, Add).



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

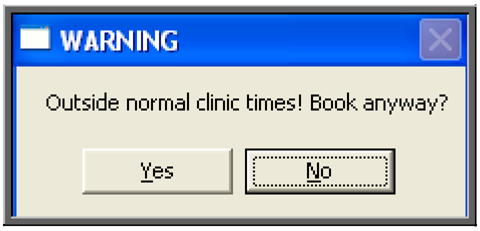
Note: An appointment cannot be created for a patient that has not been entered onto OPAS. If you suspect that the patient has not yet been entered onto OPAS, you should select No and go back to the Patients screen and add them as a patient first.

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

Patient select the patient from the pop-up list

If a this point, you discover that the patient hasn't yet been registered on OPAS and therefore they are not in the pop-up list, press **Esc** and type **N** to abandon the appointment screen.

```
Save current changes to record?  (y/n)
```

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

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

Purchaser if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press **Tab** to show 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.

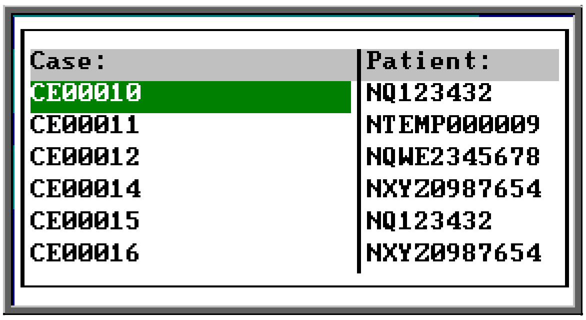
Comments — additional comments can be entered here. These do not appear on appointment letters but can be printed on clinic lists.

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 20 – Appointments – Auditing appointments). The *Event* field can also be used for assigning RTT actions (see Care Episodes – Note 9. 18 Week Journey).

Letter — will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities - Note 15. Choices - Letters)

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

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



Case:	Patient:
CE00010	NQ123432
CE00011	NTEMP000009
CE00012	NQWE2345678
CE00014	NXYZ0987654
CE00015	NQ123432
CE00016	NXYZ0987654

Move the green cursor into the Patient: column and type in the patients Hospital number to show the care episodes for that patient.

New enter Y if this is a new patient, or N if they have been seen before.

Alternatively select

S	for supply
F	for fit
R	for review
C	for cast

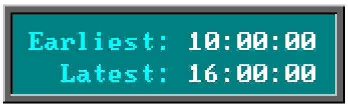
Type enter either

O	for an Out-patient
I	for an In-patient
W	for a Walk-in patient

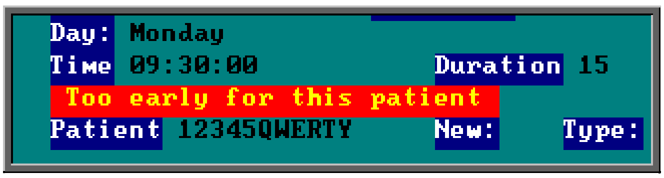
(Note: When an appointment is created for a walk in patient, the *Outcome* field will automatically be marked as Attended.)

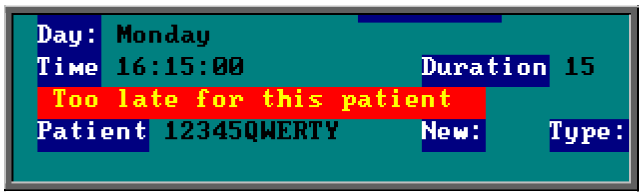
Referral if this is a new referral, the date of the referral can be entered here. This would then give you the ability to analyse how long it has taken from referral to appointment.

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.



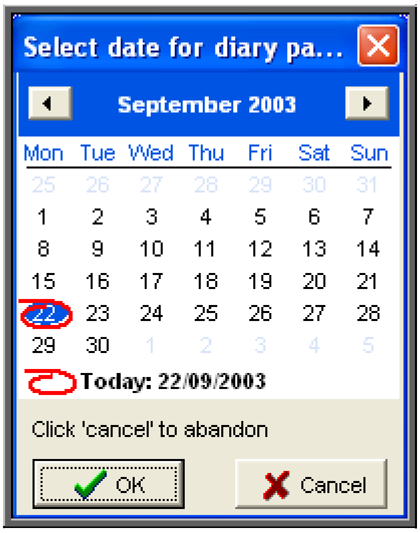


Having been given the warning message, if you continue to make the appointment anyway, the message will dissapear when you have finished filling in the appointment details.

b) Making manual appointments via the Diary screen.

The Diary screen isn't as flexible as the Session screen, in that you can not make appointments outside the clinic times or double book appointment times. However, all sessions for the same day are shown on one screen, and it is easier to see availability.

Menu: Appointments – Current – Diary

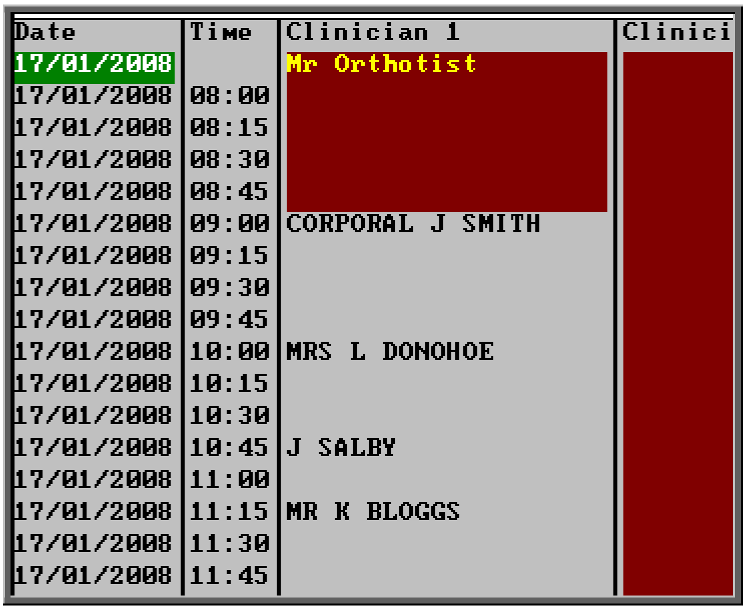


A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

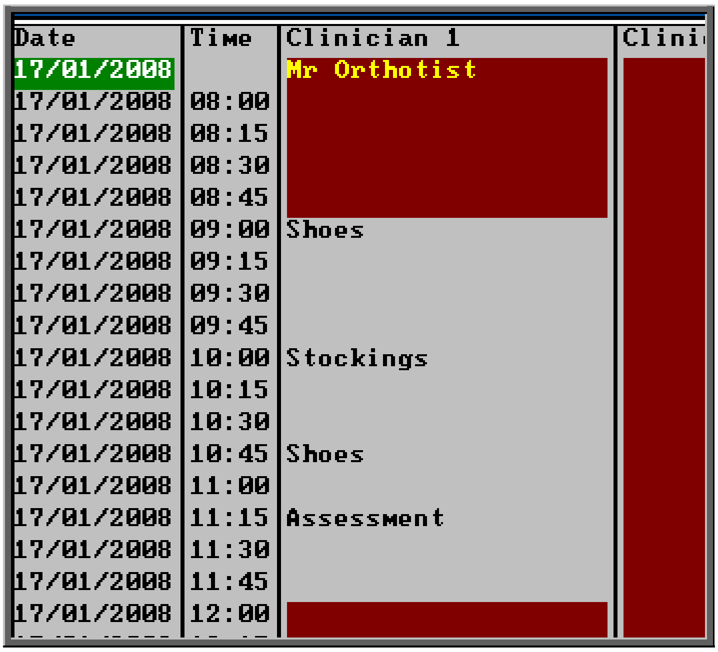
The date will default to today's date, and if you press the **Enter** key (click on OK) you will be taken to the diary page for today. Alternatively you can select a date of your choice and press the **Enter** key (click on OK).

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

The Diary screen default display shows the name of the patients occupying each appointment slot.



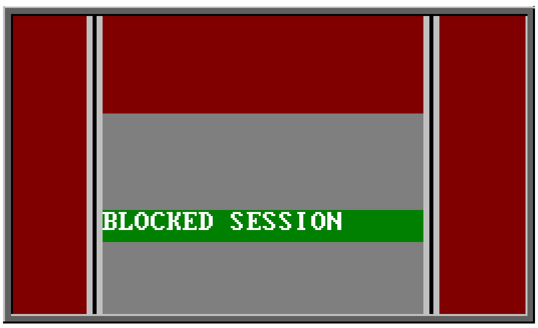
To change the name to show the reason for each appointment slot, click on Display, Notes at the top of the screen.



If you wish to revert back to patient names, click on Display, Names at the top of the screen.

The red area of the screen represents times outside the clinic hours, whereas the lighter grey area is available for making appointments. The darker grey area indicates that the session is blocked. Unlike making an appointment in the Session screen, you **can not** make appointments in the Diary screen that are outside the clinic hours.

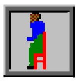
If you are unsure whether the clinic is blocked or not, simply click on the grey area and if it is blocked it will say so.

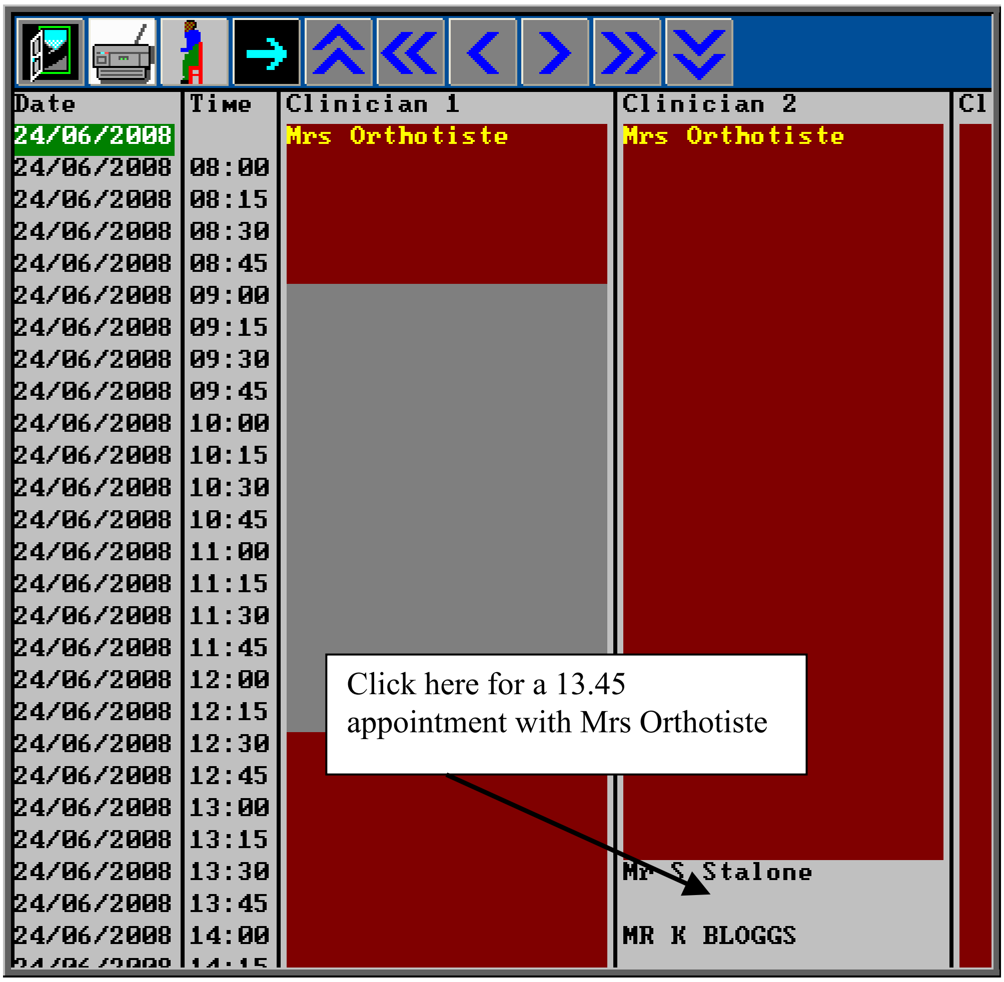


You can make appointments for blocked clinics in the Diary screen. You will be warned that the clinic is blocked, but allowed to continue. (In the same way that it does in the Session screen).

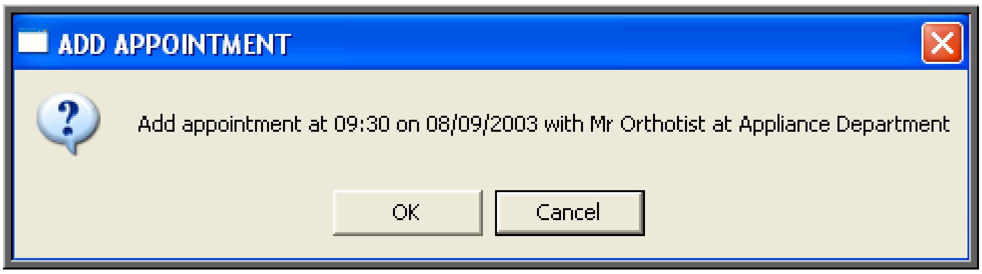
Making the appointment

You will be able to see which appointments have been allocated, as these will contain the patient's name.

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



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



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

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

Patient select the patient from the pop-up list

If a this point, you discover that the patient hasn't yet been registered on OPAS and therefore they are not in the pop-up list, press **Esc** and type **N** to abandon the appointment screen.

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

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

Purchaser if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press **Tab** to show 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 20 – Appointments – Auditing appointments). The *Event* field can also be used for assigning RTT actions The *Event* field can also be used for assigning RTT actions (see Care Episodes – Note 9. 18 Week Journey).

Letter will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities - Note 15. Choices - Letters)

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

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

Case:	Patient:
CE00010	NQ123432
CE00011	NTEMP000009
CE00012	NQWE2345678
CE00014	NXYZ0987654
CE00015	NQ123432
CE00016	NXYZ0987654

Move the green cursor into the Patient: column and type in the patients Hospital number to show the care episodes for that patient.

New — enter Y if this is a new patient, or N if they have been seen before.

Alternatively select

- S for supply
- F for fit
- R for review
- C for cast

Type — enter either

- O for an Out-patient
- I for an In-patient
- W for a Walk-in patient

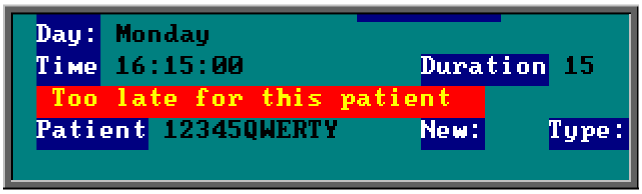
(Note: When an appointment is created for a walk in patient, the *Outcome* field will automatically be marked as Attended.)

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

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.



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

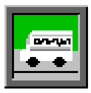
9. Allocating appointments automatically (via order)

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  (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 'goods in' icon  (Goods, In).

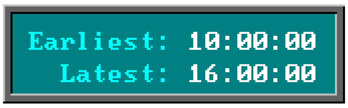
If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you do need to make another appointment.

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)
- Morning/Afternoon/Evening appointment selected (optional)

and also information held on the patient record (a) and system parameter screen (b).

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



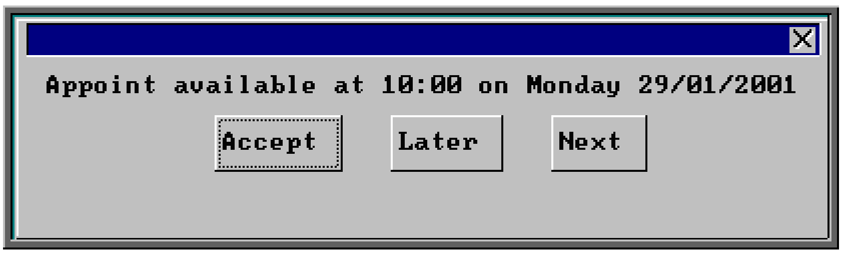
If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.

I

b) If you do not want OPAS to start searching for availability straight away, a delay can be set in the System parameters screen.

To do this, go into Utilities – Choices – System, and enter the number of days in the *Automatic Delay* field within the Appointments section.

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.

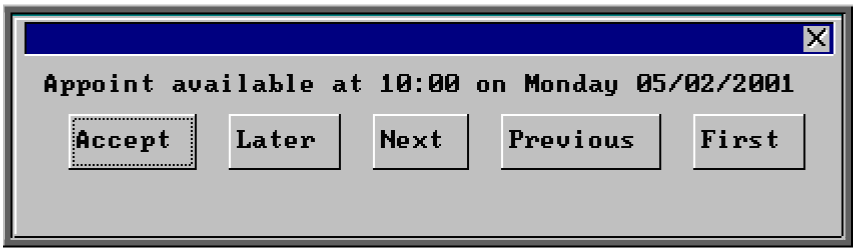
Accept — If you are happy with the first date/time offered click on the Accept button with the mouse (type A).

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 (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 (type N).

If you wish to abandon finding an appointment press Esc

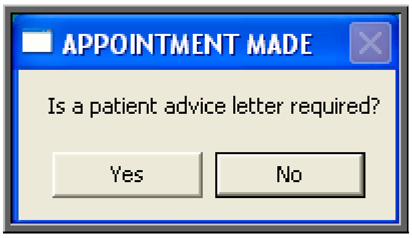
If you select Later and/or Next two more options become available.



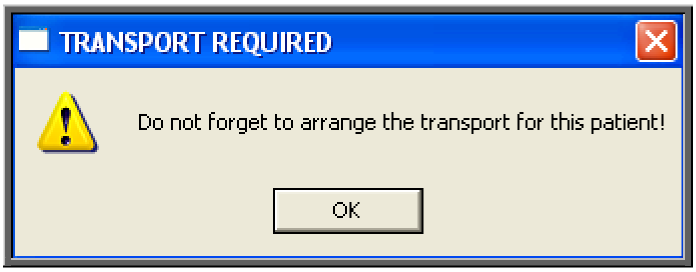
Previous — Click on Previous (type P) to go back to the previous date offered.

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

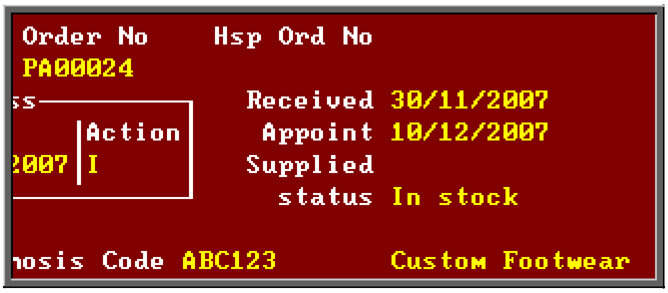
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.



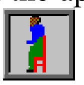
If the patient requires transport, you are reminded to arrange it:



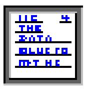
Having arranged the appointment you will be returned to the Order screen where the *Received* field will have been populated with today's date, the *Appointment* field with the date of the accepted appointment and the *Status* changed from On Order to In Stock.



Notes.

1) 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  (Goto, Appointment) to take you to the appointment just made, and edit the *New:* field accordingly.

2) What goes into the *Notes*: field on the appointment can be controlled using a Default.

   To do this go into Utilities – Choices – Defaults. Find default Number 48 and click on the 'update' icon  (Edit, Update). At the bottom of the screen you will be asked to type in the New Default.

   Type the word you want to appear in the *Notes*: field and press **Enter**.

   If you want the *Description* field from the Order to appear in the *Notes*: field, type in the following formulae:

   =dbget("[applianc.description]")

   Contact the OPAS helpdesk if you need help with this new default

3) A default event can be set for appointments made from the order.

To do this, go into Utilities – Choices – System.

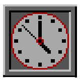
Select the event you want to appear in the *Event for Fittings* (You can press Tab to get a list of events).

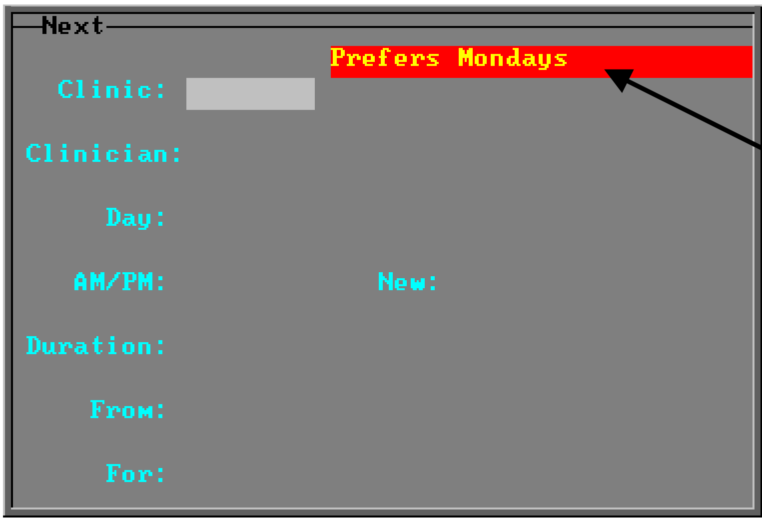
10. Allocating appointments automatically (via patient record)

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  (Data, Find).

Click on the 'next appointment' icon  (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

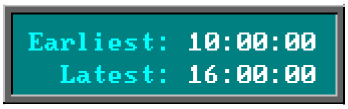
The fields below in red must be completed. The other fields are optional.

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, R for review or C for cast
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.
For	enter the reason for the appointment. This will then be put into the *Notes:* field on the new appointment for you.

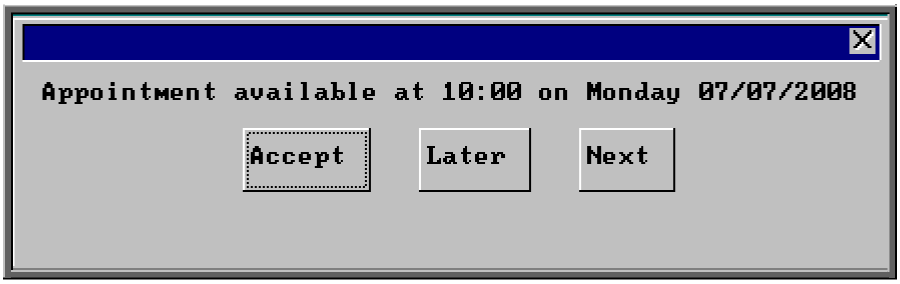
The system will now look for the first available slot from the date selected. If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you need to make another appointment.

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 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.



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 (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 (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 (type N).

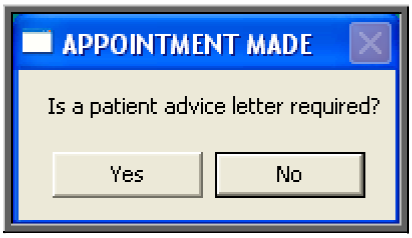
If you wish to abandon finding an appointment press Esc

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

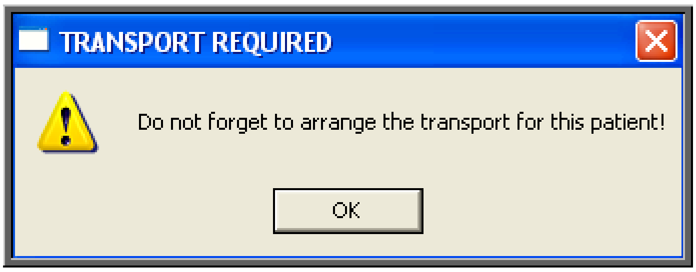
Previous Click on Previous (type P) to go back to the previous date offered.

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

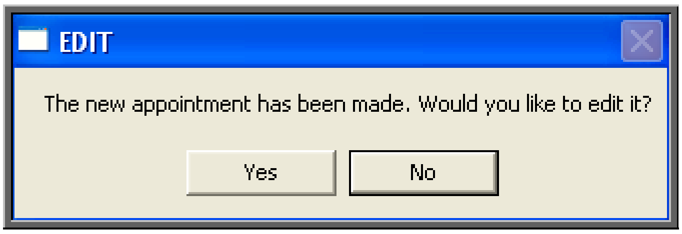
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.



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



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
- to add an event

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.

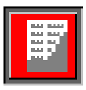
11. Allocating appointments automatically (via waiting list)

Appointments can be made for patients on the waiting list using any of the available methods. If you are using care episodes and need to link the appointment to both the waiting list and the care episode, then the appointment must be made from the Waiting List screen.

a) Making appointments from the Waiting List screen

The Waiting List screen can be accessed by either

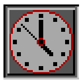
- Menu: Patients

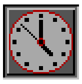
  Find the relevant patient records and click on the 'waiting list' icon  (Goto, Waiting List, Current).

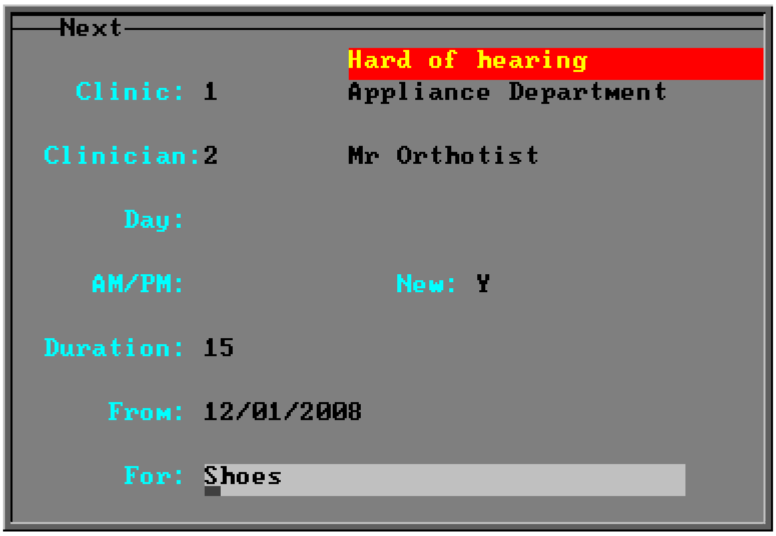
or

- Menu: Waiting List – Current

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

There are 2 ‘clock’ icons on the waiting list screen,  and  .

a) The first ‘clock’ icon  (Appoint, Next) will take you to the Next appointment selection screen.



This screen in the usual way (see Note 10. - Making an appointment manually (via the Patient)). However if you have entered the *Venue:*, *Clinician:*, *APE*, *New*, *Length:* and/or *For:* fields on the Waiting List screen, these fields will automatically flow through into this screen as you enter through each field, saving time on rekeying.

b) The ‘autoclock’ icon  (Appoint, Quick) can be used if the *Venue:* field has been completed on the Waiting List screen. The ‘autoclock’ option bypasses the Next selection screen and makes an appointment based on the information on the Waiting List screen (i.e. *Clinician:*, *APE*, *New*, *Length*: and *For:* fields).

When using the ‘autoclock’ option, OPAS will start looking for the next appointment after the number of days delay set in the System parameter screen. (see below)

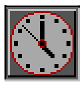
And if the *Length* field has not been completed on the Waiting List screen OPAS will take your default appointment time from the System parameter screen. (see above)

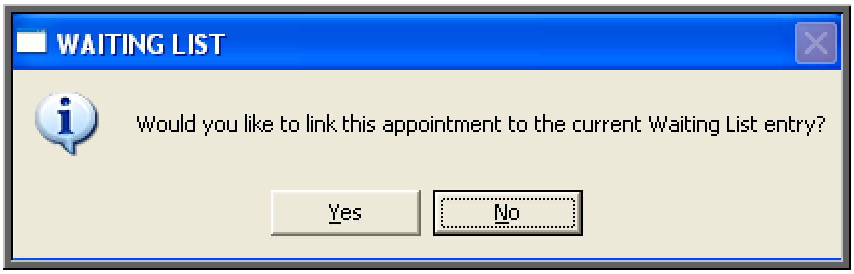
If you select the 'autoclock' option when the Venue has not been selected in the Waiting List screen, the following error message will appear.

Whichever clock is used, the appointment made will be linked to the waiting list record and the date of the appointment will be entered into the *Appointment:* field on the Waiting List screen so that you know there is a future appointment booked.

The Appointment screen will also show that the appointment is linked to the waiting list.

b) Other methods of making appointments

If an appointment is made using the 'clock' icon  on the Patient or Care Episode screen, or manually through the Session or Diary screen, OPAS will check to see if the patient is on the waiting list, and if they are, and an appointment hasn't already been assigned, you will be asked if you wish to link the appointment to the waiting list.



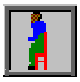
If **Yes** is selected, the date of the appointment will be entered into the *Appointment:* field on the **Waiting List** screen so that you know there is a future appointment booked.

The **Appointment** screen will also show that the appointment is linked to the waiting list.

12. Amending appointments

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  (Appointments, Current)

b) **Appointments – Current – Sessions**. Go to the session the appointment is for and click on the 'maintain' icon  (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  (Edit, Update).

The following fields may be updated. Those in red have a pop-up available. Press **Tab** to access the pop-up, if you need to select an alternate option.

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)

Letter

Type

New

Referral

Referrer

Purchaser

Notes

Comments

Event

Care Episode

Grade

Priority

Full and *Partial*

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)

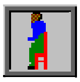
Reminder (entering a date in here will stop a reminder letter being printed – taking the date out will enable the letter to be printed again)

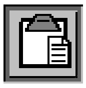
The patient cannot be amended. If you wish to offer the appointment time to another patient, the original appointment should be cancelled, and another one made for the new patient.

13. Cancelling appointments

a) 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  (Appointments, Current)

b) Appointments – Current – Sessions. Go to the session the appointment is for and click on the 'maintain' icon  (Appointments, Maintain).

c) Appointments – Current – Appointments. Find the appointment by searching on the patient's hospital number.

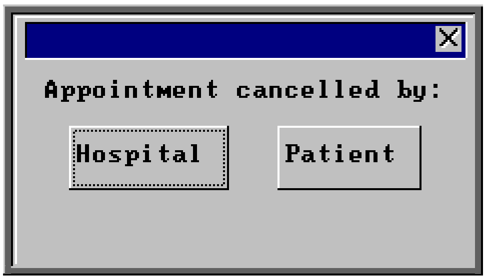
b) Cancelling the Appointment

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

2. You will then be asked to enter the reason for cancelling.

3. Type in the reason (leave blank if you wish to) and click on OK to continue. If you wish to abandon cancelling the appointment, click on Cancel.

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

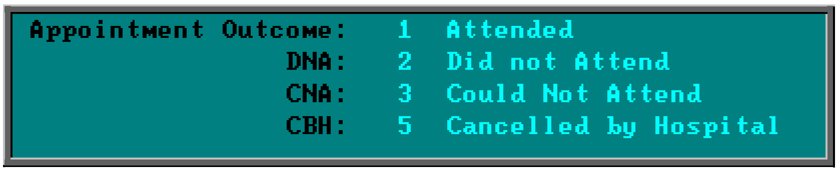


- If Patient is selected the *Outcome* field on the appointment will be automatically populated with Could not Attend.

- 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.



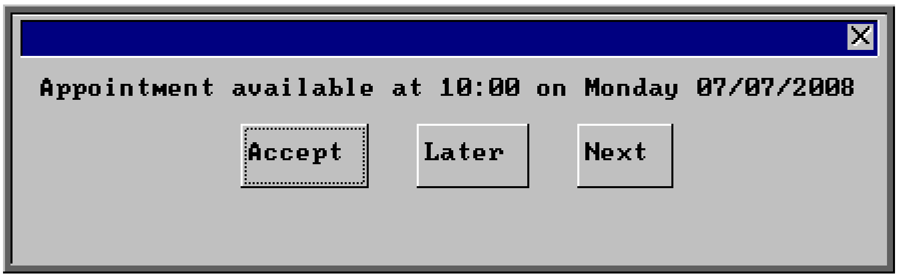
5. If transport was required, you will be told so that the arrangements with the ambulance service can be cancelled.

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

c) 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 tomorrows 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.



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 (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 (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 (type N).

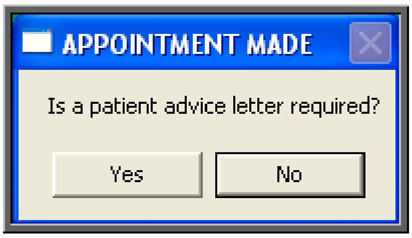
If you wish to abandon finding an appointment press Esc

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

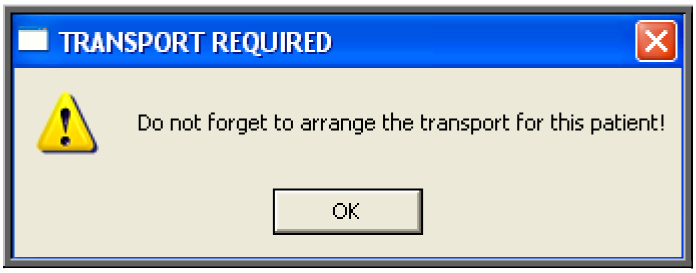
Previous Click on Previous (type P) to go back to the previous date offered.

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

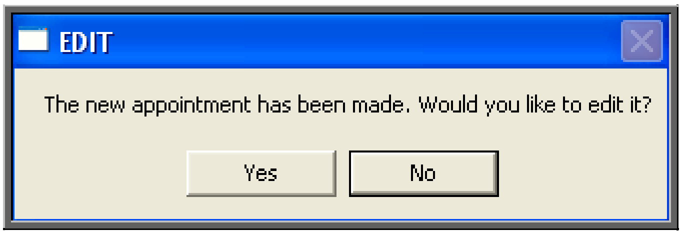
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.



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



You will then be given the opportunity to edit the appointment.

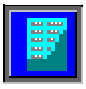


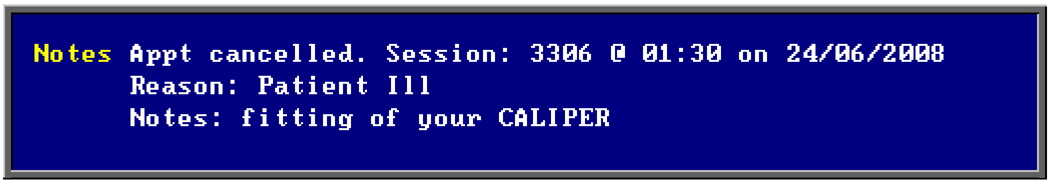
The appointment information that was entered when the original appointment was created will be copied into the new appointment e.g. Notes, Order number etc

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.

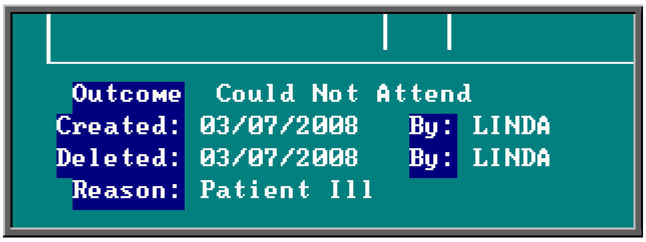
When you have finished editing, press **Ctrl-Enter** to save and return to the appointment that has just been cancelled.

d) Recording Cancelled Appointments

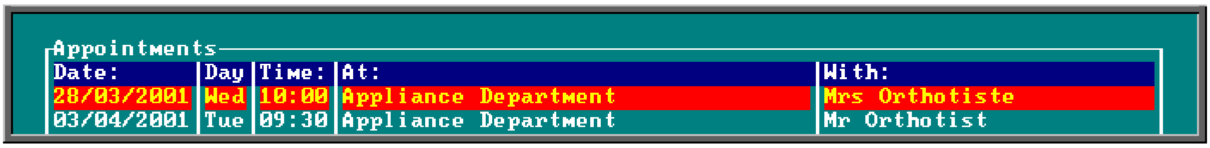
When an appointment has been cancelled a note is automatically entered on the patient record giving the details of the cancelled appointment. Looking at the note in full (clicking on the 'note' icon  (Goto, Notes)) will show why the appointment was cancelled, by whom and the reason for the original appointment.



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



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



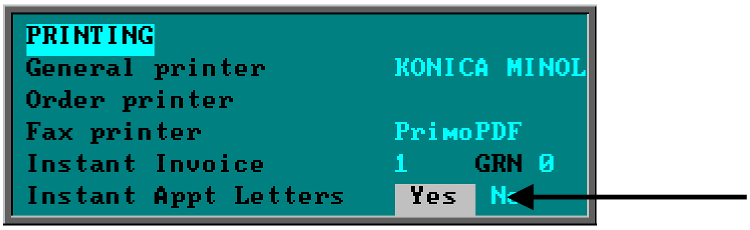
However, whether the parameter is set to Remove or Keep, when an appointment is cancelled, that appointment time becomes available again so that another patient can be offered it. Cancelled appointments will also be taken into the archive when run, so that they can be incorporated into reports.

14. Instant printing appointment letters

There is a switch in the system parameters that will result in appointment letters being printed instantly i.e. as the appointments are raised. This is an alternate method to batch printing (see Note 16. Batch printing appointment/collection letters).

If you want each individual appointment letter to print automatically when you have finished inputting the appointment there are two switches to set.

1) Go into Utilities – Choices – System and select Yes in the *Instant Appt Letters* field.



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

Press the **Enter** key.

2) Go into Appointments – Venues and enter Y in the *Instant:* field for each venue that wants to instant print.

Having two switches enables hospitals to have some venues instant printing while others choose to print in batch.

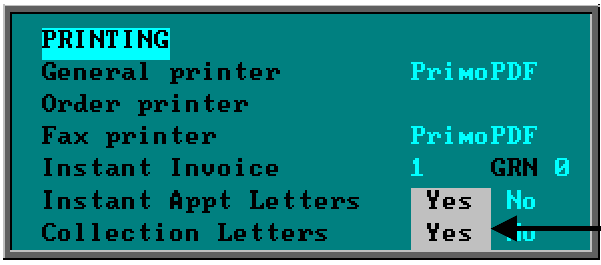
Once these switches have been activated, whenever you make an appointment (using **any** method) the appointment letter will print as soon as the appointment has been completed. The only exception to this is in the Diary screen, where the letter prints once the Diary screen has been exited.

15. Instant printing collection letters

There is a switch in the system parameters that will result in collection letters being printed instantly i.e. as the goods are booked in on the order. This is an alternate method to batch printing (see Note 16. Batch printing appointment/collection letters).

If you want each individual collection letter to print automatically when you book goods as received on the order, there are two switches to set.

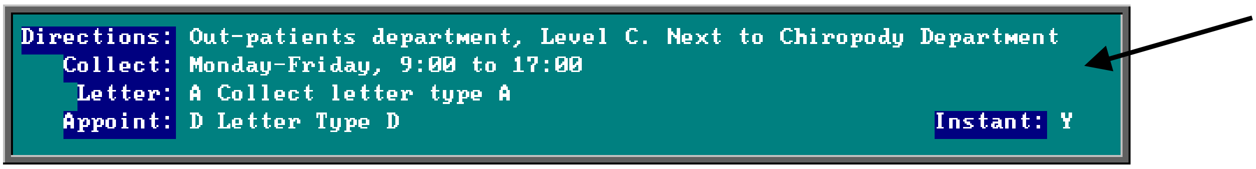
1) Go into Utilities – Choices – System and select Yes in the *Collection Letters* field.



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

Press the **Enter** key.

2) Go into **Appointments – Venues** and enter Y in the *Instant:* field for each venue that wants to instant print.



Having two switches enables hospitals to have some venues instant printing while others choose to print in batch.

16. Batch printing appointment/ collection letters

There are a number of ways of batch 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.

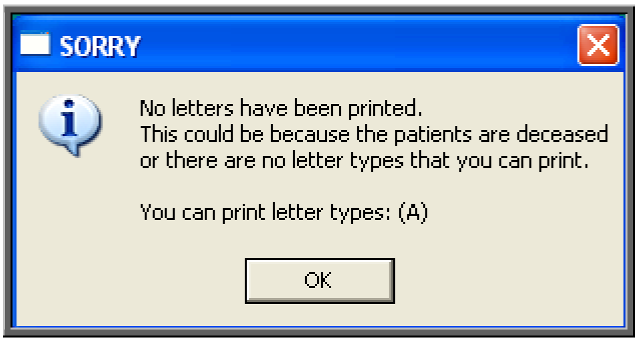
Menu: Appointments – Print – Letters

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  (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 Edit, Update). Then select Appointments – Print – Letters and run Auto-print again.

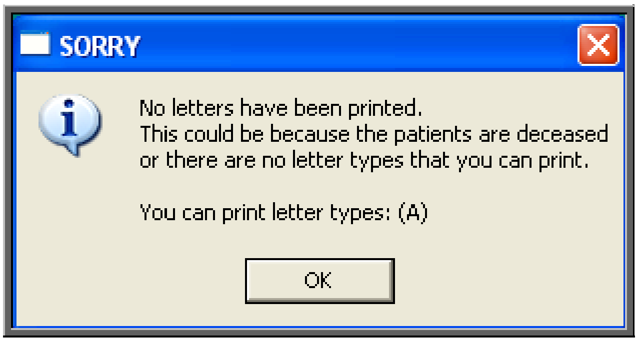
Option 2. Printing outstanding appointment/collection letters for a session.

Menu: Appointments – Current – Sessions

Find the session required and click on the 'letters' icon  (Letters).

To print the letters click on the 'auto-print' icon  (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 37. Users)

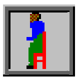
When printing appointment letters from the Sessions screen, this message box will also appear if there are no outstanding appointment letters for this session (i.e. they have already been printed).

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.

In the first two options, OPAS will check that the unprinted appointment letter isn't for an appointment and will not print it if it is. Printing the letter from the Patient screen will print the letter regardless of the appointment date. This can be useful, for example, if you have a patient that needs a copy letter for their employer.

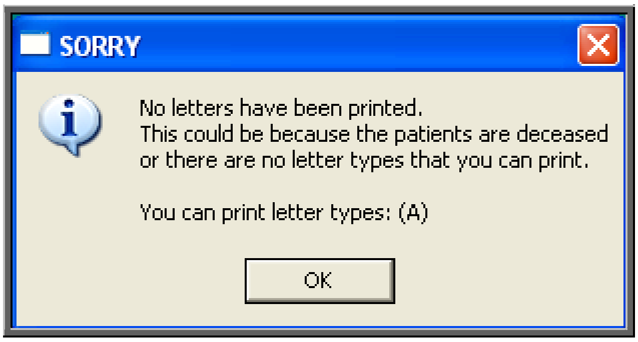
Menu: Patients

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

Now click on the 'letters' icon  (Letters). 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  (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 37. Users)

17. Printing transport memos

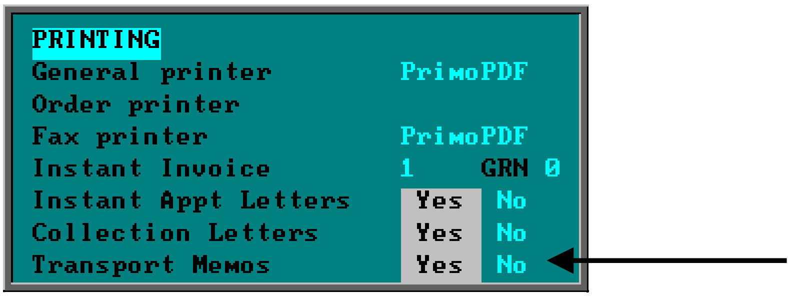
There are four options available for printing transport memos.

Option 1. Instant printing

There is a switch in the system parameters that will result in transport memos being printed instantly i.e. as the appointments are raised.

If you want each individual transport memo to print automatically when you have finished inputting the appointment there are two switches to set.

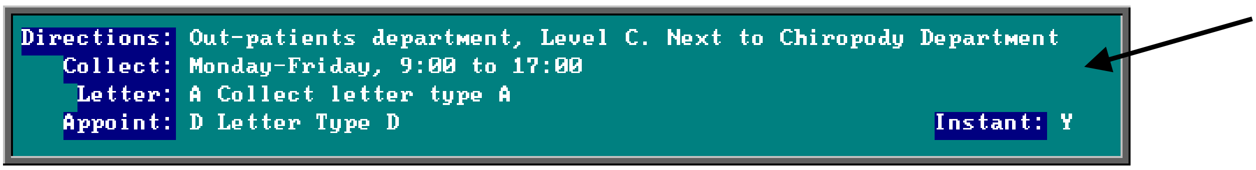
1) Go into Utilities – Choices – System and select Yes in the *Transport Memos* field.



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

Press the **Enter** key.

2) Go into Appointments – Venues and enter Y in the *Instant:* field for each venue that wants to instant print.

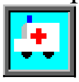


Having two switches enables hospitals to have some venues instant printing while others choose to print in batch.

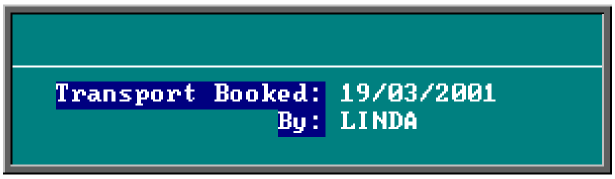
Once these switches have been activated, whenever you make an appointment (using **any** method) the transport memo will print as soon as the appointment has been completed. The only exception to this is in the Diary screen, where the memo prints once the Diary screen has been exited.

Option 2. Batch printing from the letters screen

Menu: Appointments – Print – Letters

If you are in the Letters screen printing appointment and collection letters, then you can use the 'transport' icon  (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.



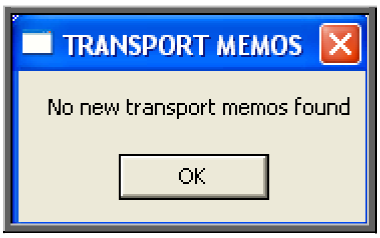
If you need to reprint a transport memo, find the relevant appointment and simply remove the date from the *Transport Booked:* field (using Edit, Update) and run the Transport option again.

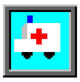
Option 3. Batch printing from the transport screen

Menu: Appointments – Print – Transport

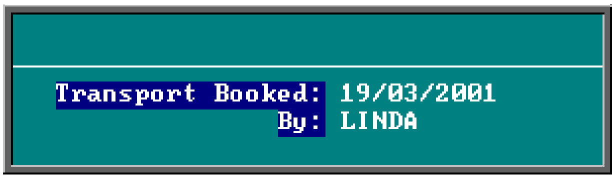
If you only want to print transport memos, you may choose to use this option instead. The Transport screen will show all those appointments that require transport, where the transport memo has not yet been printed and the appointment date is in the future.

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  (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.

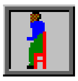


If you need to reprint a transport memo, find the relevant appointment and simply remove the date from the *Transport Booked:* field (using Edit, Update) and run the Transport option again.

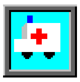
Option 4. Printing from the patient screen

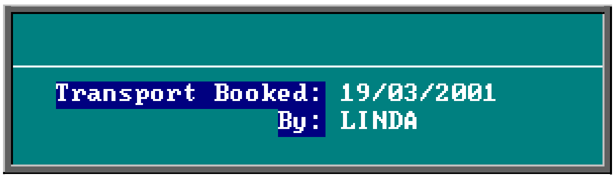
Menu: Patients

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

click on the 'appointment' icon  (Appointments, Current). (If you need to reprint a transport memo, simply remove the date from the *Transport Booked* field (using Edit, Update) first)

Now click on the 'letters' icon  (Letters).

To print the transport memo, click on the 'transport' icon  (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.

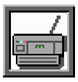


18. Printing clinic lists

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.

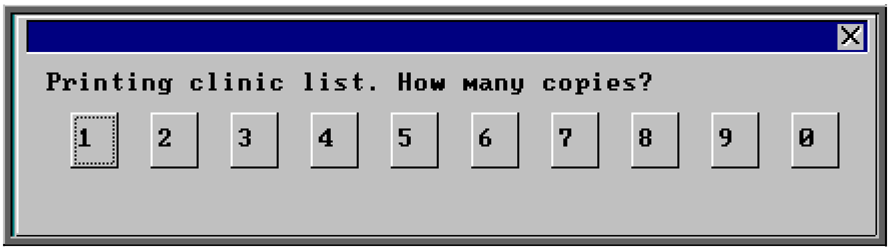
Option 1. Printing individual clinic lists.

Menu: Appointments – Current – Sessions

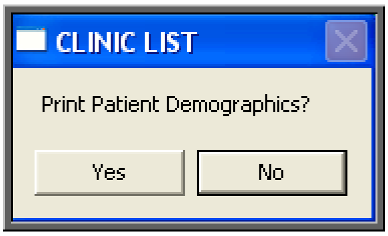
Find the session that you wish to print and click on the 'print' icon  (File, Print) and select List from the drop down menu.

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). This prompt can be switched on/off by going into Utilities – Choices – System.

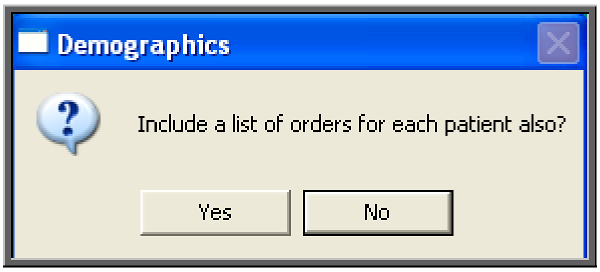
You can then select how many copies of the clinic list are required. If you wish to abandon printing the clinic list select 0.



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 8. Printing Options). This prompt can be switched on/off by going into Utilities – Choices – System.



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.



Note: When clinic lists are printed from the Session screen, a prompt appears to ascertain whether you would like to include collections.

A system parameter allows clinic lists to always include collections, to never include collections or to continue seeing the prompt so that you can choose each time the clinic list is printed.

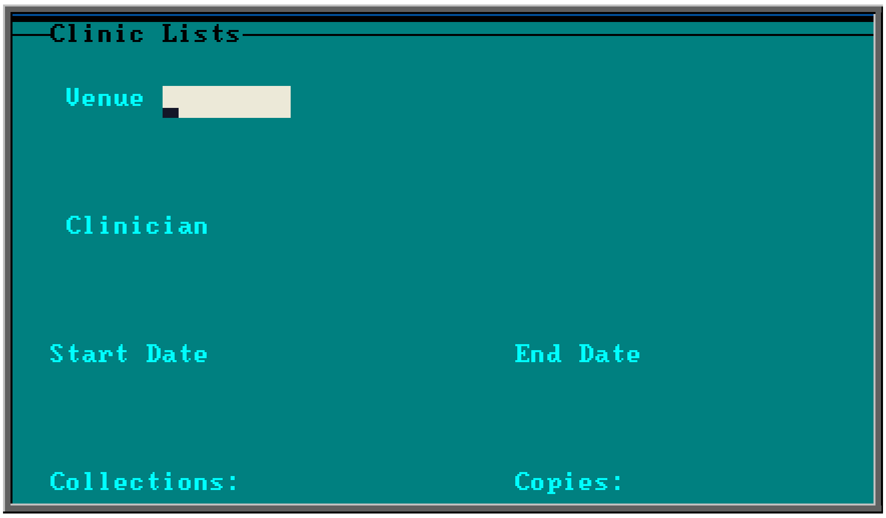
Go to Utilities – Choices – System, and select the appropriate option in the *Collections printed on Clinic Lists?* field.

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

Press the **Enter** key.

Option 2. 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.

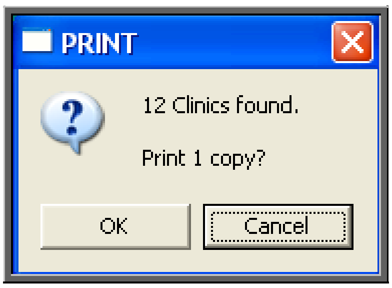
Clinician if you want to print clinic lists for all Clinicians between the date ranges specified leave this field blank (by pressing the **Esc** key when offered the available options), else make your selection.

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 including collections on the list 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.

Note: 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.

19. 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.

Option 1. Updating Appointment Outcome

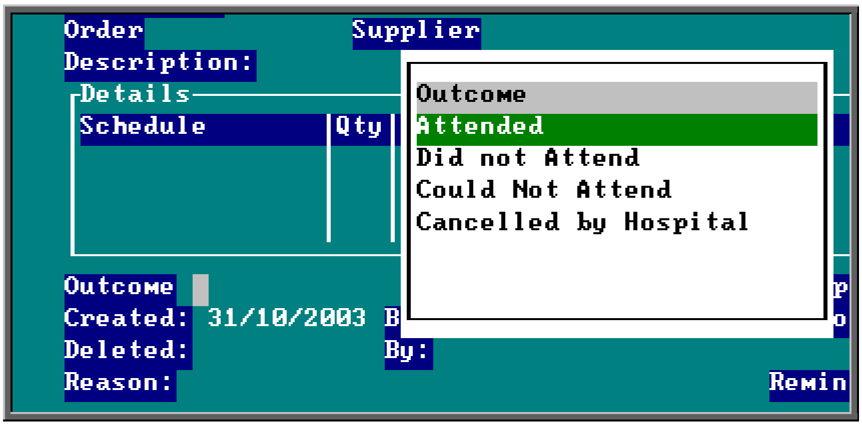
Updating appointment outcome has two benefits. Firstly, it enables statistical information to be produced showing not only how many appointments occurred over a particular period, but also how many of those were attended. Secondly, it enables OPAS to keep track of those people who are not attending their 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 24. Printing DNA letters).

Menu: Appointments – Current – Sessions

Find the session that is to be updated, and click on the 'maintain' icon (Maintain) from the options above the icons. You will now be able to see an appointment screen for each patient that has an appointment at that clinic.

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

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



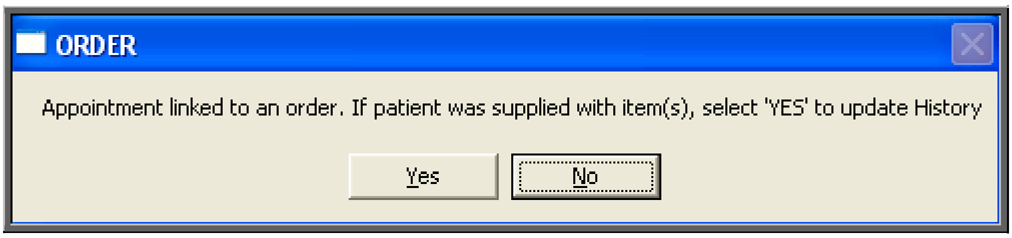
We have set four outcomes up for you to choose from; Attended, Did not Attend, Could not Attend and Cancelled by Hospital. You can set up more options if necessary in Utilities – Choices – Appointment Outcome.

Make your selection and 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.

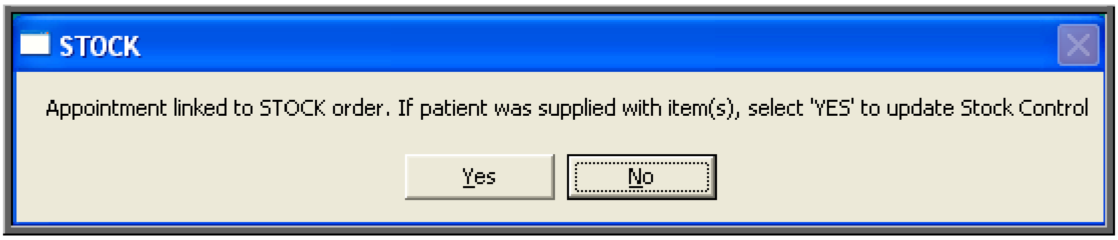
Attended appointments

a) links to the order

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.



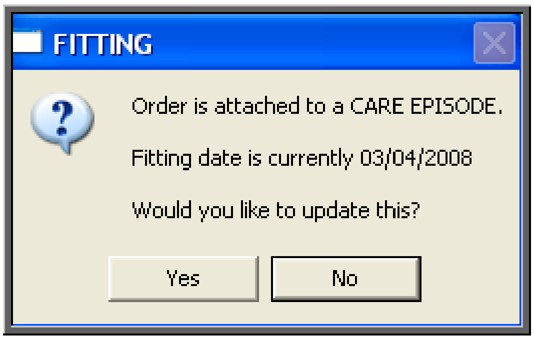
If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated



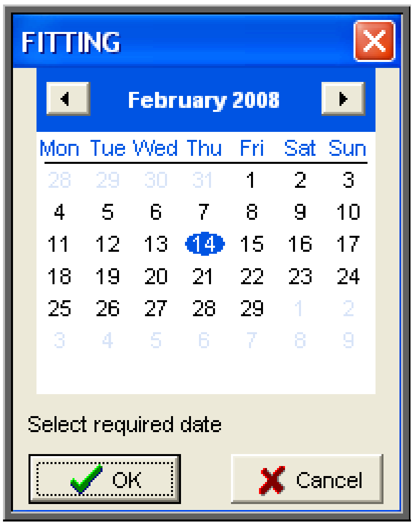
b) links to the care episode

If the patient attended the appointment, and you have selected to update the order as goods supplied, OPAS will then look to see if the appointment/order is linked to a care episode. If it is, you will then be asked whether you would like to update the *Fitting:* field on the care episode.

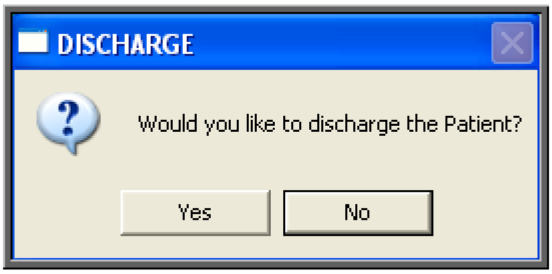
You will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



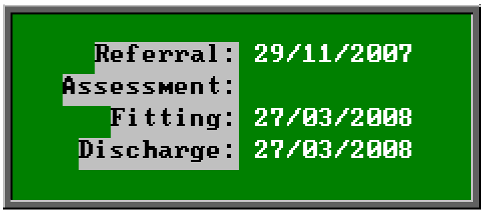
If you choose to update the fitting field, the calendar prompt will appear, so that a date can be selected. The calendar will default to the date of the appointment that has just been marked as Attended.



You then have the option to discharge the patient.

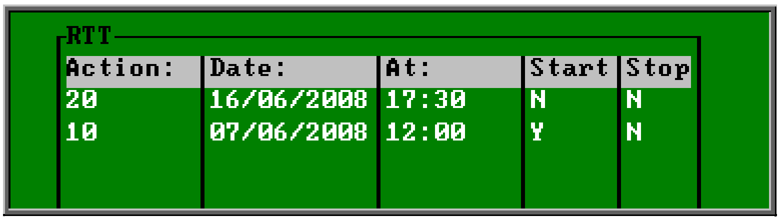


If Yes is selected, then the fitting date selected will also be entered into the *Discharge:* field on the care episode.



c) links to the *Event:* field (RTT)

If the appointment has an event in the *Event:* field that has an RTT (Referral to Treatment) action assigned against the attendance of the appointment, then the RTT table on the care episode will be updated.



d) links to the waiting list

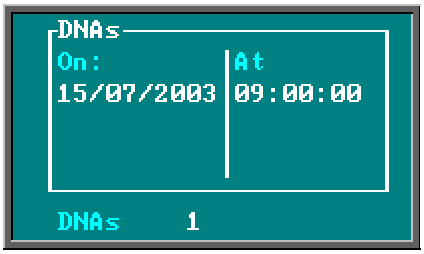
If the appointment is linked to the waiting list (Y in the *waitlist:* field), marking the appointment as attended will update the waiting list screen and remove the patient from the waiting list.

Non- attendance of an appointment

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 tomorrows 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.

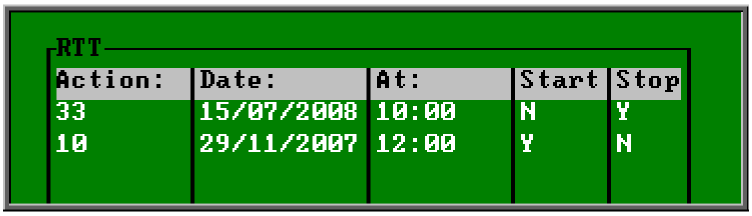
a) links to the DNA screen

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.



b) links to the *Event:* field (RTT)

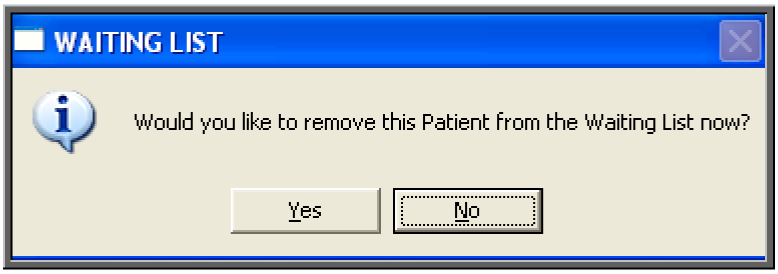
If the appointment has an event in the *Event:* field that has an RTT (Referral to Treatment) action assigned against the non-attendance of the appointment, then the RTT table on the care episode will be updated.



c) links to the waiting list

If the appointment is linked to the waiting list (Y in the *waitlist:* field), the action carried on marking the appointment as DNA will depend on the option set in the system parameter screen.

Ask If a an appointment that is linked to the waiting list is marked as Did Not Attend, and a further appointment is not made, you will be asked if you wish to remove the patient from the waiting list.



Yes If a an appointment that is linked to the waiting list is marked as Did Not Attend, and a further appointment is not made, the patient will be removed from the waiting list.

Option 2. Logging patient arrival/departure

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 click on the 'maintain' icon (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.

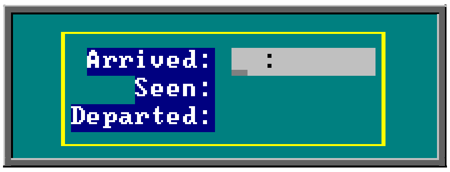
Arrived select to enter the time the patient arrived for their appointment. The current time will appear at the bottom of the screen. This can be amended if necessary, and press **Enter** to accept.

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 (more than one) of the times in one step.

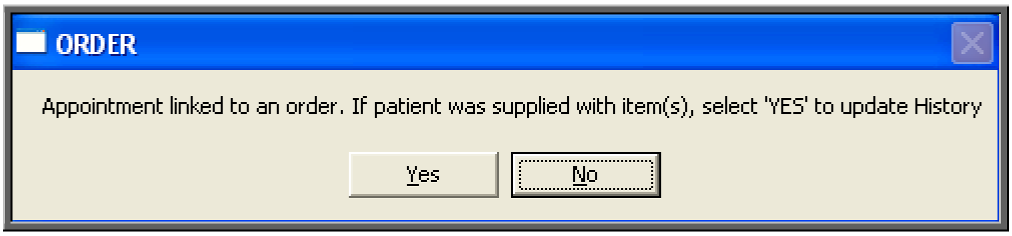


The cursor will move into the log box where you can enter the Arrived, Seen and Departed times. If you do not wish to enter a time in one of these fields, simply press the **Enter** key to move to the next field.

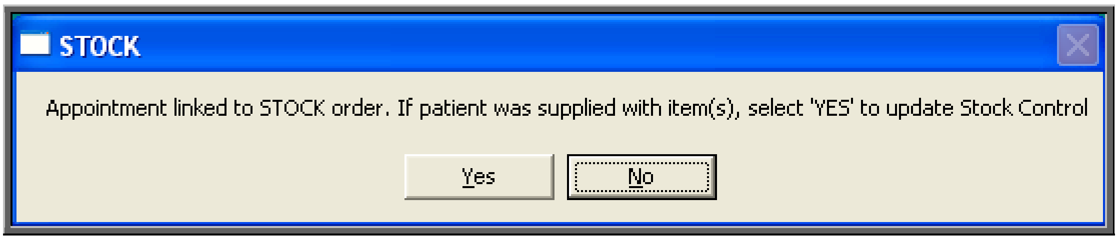
Once the Departed field has been entered, you will then be automatically taken to the next patient with an appointment at that clinic. Enter the times for the next patient and continue to do this until all the appointments have been updated. Once the last appointment has been logged, you will be taken 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.

a) links to the order

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.



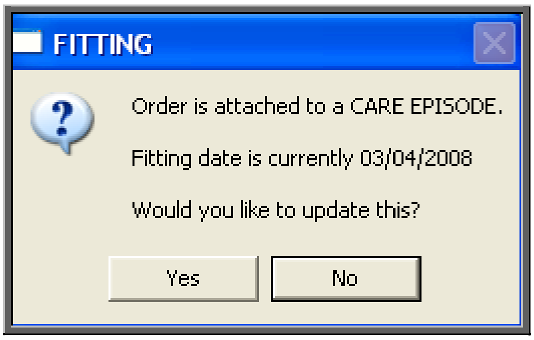
If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated



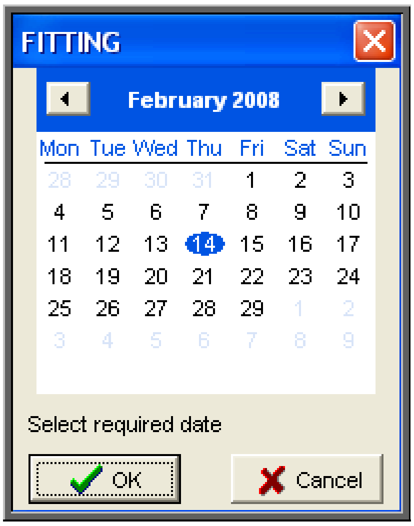
b) links to the care episode

If the patient attended the appointment, and you have selected to update the order as goods supplied, OPAS will then look to see if the appointment/order is linked to a care episode. If it is, you will then be asked whether you would like to update the *Fitting:* field on the care episode.

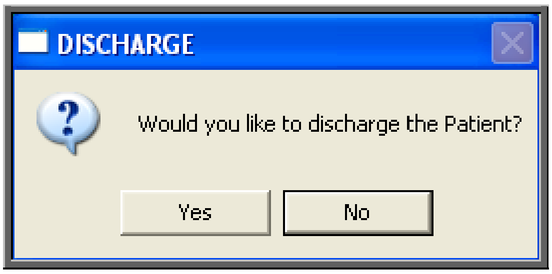
You will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



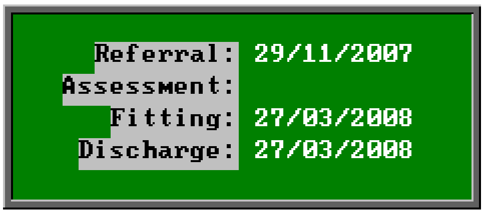
If you choose to update the fitting field, the calendar prompt will appear, so that a date can be selected. The calendar will default to the date of the appointment that has just been marked as Attended.



You then have the option to discharge the patient.

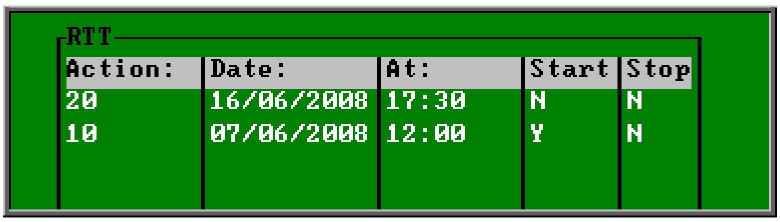


If **Yes** is selected, then the fitting date selected will also be entered into the *Discharge:* field on the care episode.



c) links to the *Event:* field (RTT)

If the appointment has an event in the *Event:* field that has an RTT (Referral to Treatment) action assigned against the attendance of the appointment, then the RTT table on the care episode will be updated.



d) links to the waiting list

If the appointment is linked to the waiting list (Y in the *waitlist:* field), marking the appointment as attended will update the waiting list screen and remove the patient from the waiting list.

20. Auditing appointments

On the appointment screen there is a field called *Event:*. There are two purposes for this field.
One is is to catergorise the type of appointment and against each category allocate set questions and possible responses to be completed after the patient has been seen. However, it can also be used for assigning Referral to Treatment actions against the event (see Care Episodes - Note 9. 18 Week Journey).

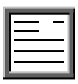
Each event can have multiple questions, and questions can have multiple answers.

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.)

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: Utiliites – Choices – Appointment – Questions

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

Question type in the question

Continue until all the questions have been entered.

2. Setting up the Responses

Menu: Utiliites – 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.

3. Setting up the Events

Menu: Utiliites – Choices – Appointment – Events

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

Event	type in the event
Question up	select the first relevant question for the event from the pop-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.

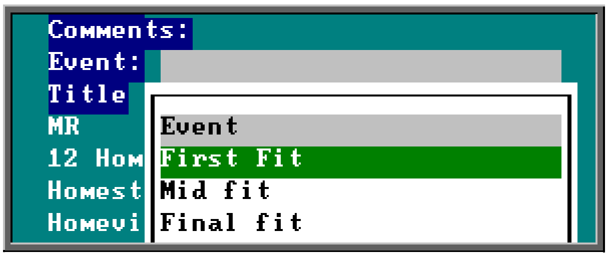
Click on the word Questions above the icons.

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

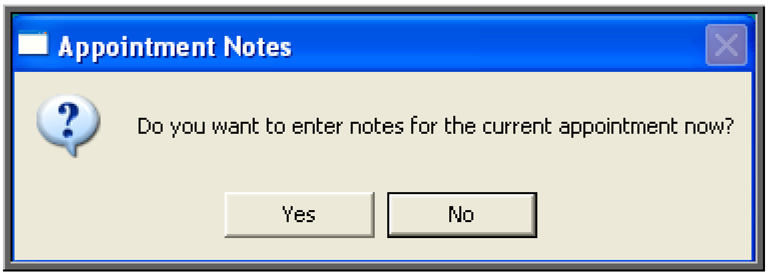
Response	select all the relevant responses required for this question. When you have finished, press **Esc** to make the response pop-up list disapear and then press **Ctrl-Enter** to save.

4. Using the Event field

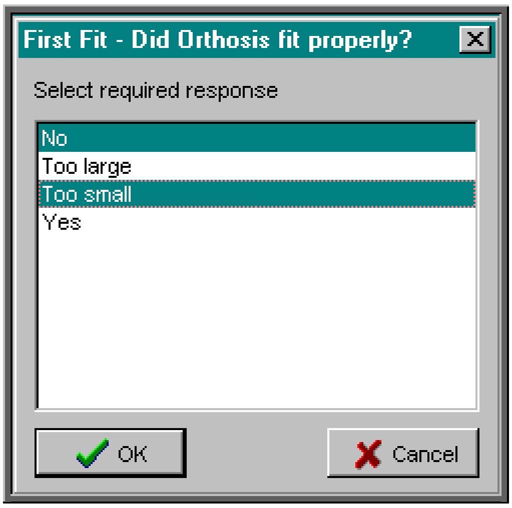
When making an appointment, select the appropriate *Event* from the pop-up list.



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.

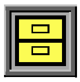
21. Archiving sessions

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.

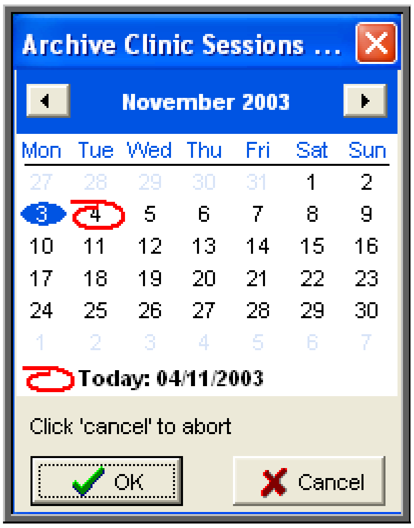
You must be the only user in OPAS when archiving sessions, so ensure everybody is logged off first. (Utilities – Who will tell you who is currently using OPAS)

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  (Appointments, Archive).

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.



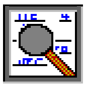
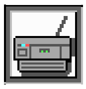
OPAS will now start to archive all the session and their associated appointments up to the date entered. If this task is performed regularly it will only take a short while (no longer than a couple of minutes). When the archive is complete the icons at the top of the screen will reappear.

22. Accessing archived appointments

Once sessions have been archived, those sessions are their associated appointments can still be seen by going into Appointments – Archived – Sessions and Appointments – Archived – Appointments.

a) Printing clinic list for archived sessions

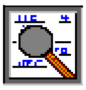
Menu: Appointments – Archived – Sessions.

Click on the 'find' icon  (Data, Find), and select Date from the options at the top of the screen. Enter the date of the archived session you wish to print. Once you have found the session, click on the 'print' icon  (File, Print) and select List.

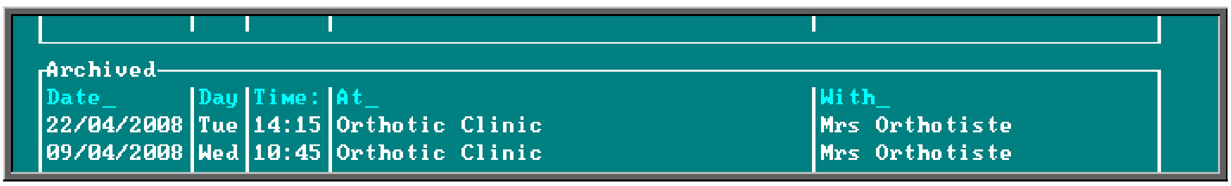
Although the archived session screen layout is different to the current session screen, the printed list can be the same.

b) Looking at patients archived appointments

Menu: Patients

Use the 'find' icon  (Data, Find), to find the relevant patient, and click on Appointments at the top of the screen and select Archived from the drop down menu.

Some patient templates include the archived appointments table (see Patients - Note 1. Introduction).



Archived

Date_	Day	Time:	At_	With_
22/04/2008	Tue	14:15	Orthotic Clinic	Mrs Orthotiste
09/04/2008	Wed	10:45	Orthotic Clinic	Mrs Orthotiste

23. 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

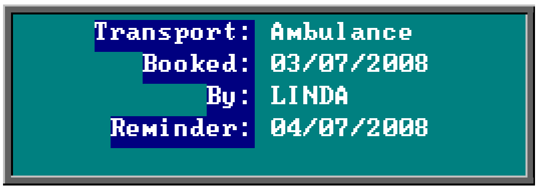
The Reminders screen will show you details of those appointments where 6 weeks have passed since the patient was sent their original appointment letter and it is now only 1-3 weeks away from the appointment date. (Contact the OPAS Helpdesk if you need to change these parameters)

To print the letters click on the 'auto-print' icon  (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 you need to reprint an reminder letter, find the relevant appointment and simply remove the date from the *Reminder:* field (using Edit, Update). Then select Appointments – Print – Reminders and run Auto-print again.

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

24. 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 3 month period. This would mean that if they DNA'd on the 1 Feb 2007 and then again on 28 Apr 2007 they would not get a letter. However, if they then DNA'd again on 1 Nov 2007 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 3 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 (WP) to see the letter. If you wish to edit the letter, click on the 'four coloured squares' icon (Wordprocessor). The data fields are already there, but you need to add your own wording of the letter. (see Utilities – Note 15. Choices - Letters) on word processing functions)

To come out of the letter once you have finished, click on the 'exit' icon (File, Exit), and then click on the 'exit with a question mark' icon (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.

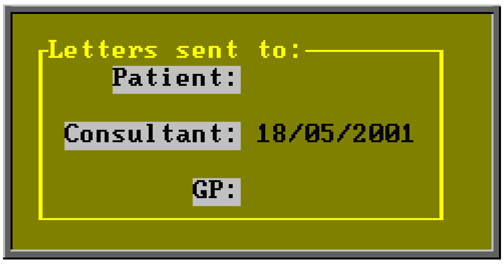
Follow the steps above to edit all the DNA letters you intend to use.

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

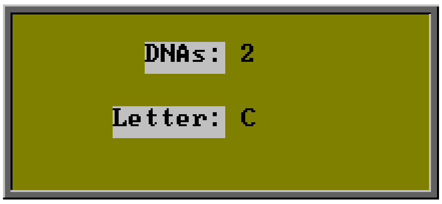
c) Printing the DNA letters in batch

Menu: Appointments – Print – DNAs

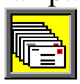
This will show all the patients that have broken the DNA rule (using the criteria defined in the system parameters – see step (a) above). Some of these patients may already have had DNA letters sent. The *Letters sent to* box would indicate if any letters have been produced, and when.

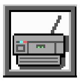


The patient who most recently broke the rule will be shown first. There will be one record for each patient regardless of how many DNAs they have. The appointment date and time will be of their most recent DNA and the DNAs: field will show how many DNAs they have had in your DNA period (using the criteria defined in the system parameters – see step (a) above).



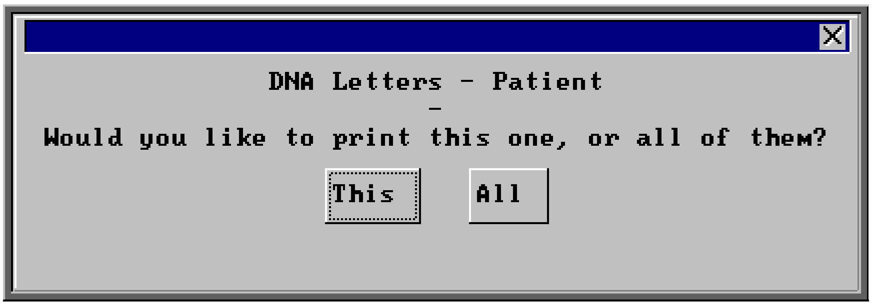
Each DNA has a letter template associated to it. Which letter template is allocated can be set up in Utilities – Choices – Defaults (see Utilities - Note 6. Choices - Defaults). This gives you the ability to select different letter templates for different purchasers/clinics for example.

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  (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 37. Users).

Click on the ‘print’ icon  (File, Print) to access the print menu.

Select whom the DNA letter is to be sent to.

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



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

If All is selected, letters will only be produced if the letter hasn’t been printed already. If This is selected, the letter can be printed even if it has been printed before.

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 21. 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.

d) Printing individual DNA letters

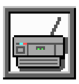
Menu: Patient

At the top of the screen click on Goto, and then DNAs.

This will show **all** the appointment that the patient did not attend, with the most recent 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 6. 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, click on the 'letters' icon  (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 37. Users).

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

Select whom the DNA letter is to be sent to.

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.

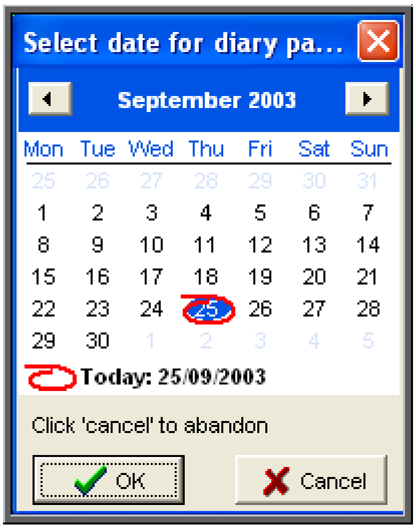
Note: When the letters are printed, a copy will also be printed for any carbon copy recipient that is allocated against that patient (see Patients – Note 21. Carbon Copies).

25. 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.

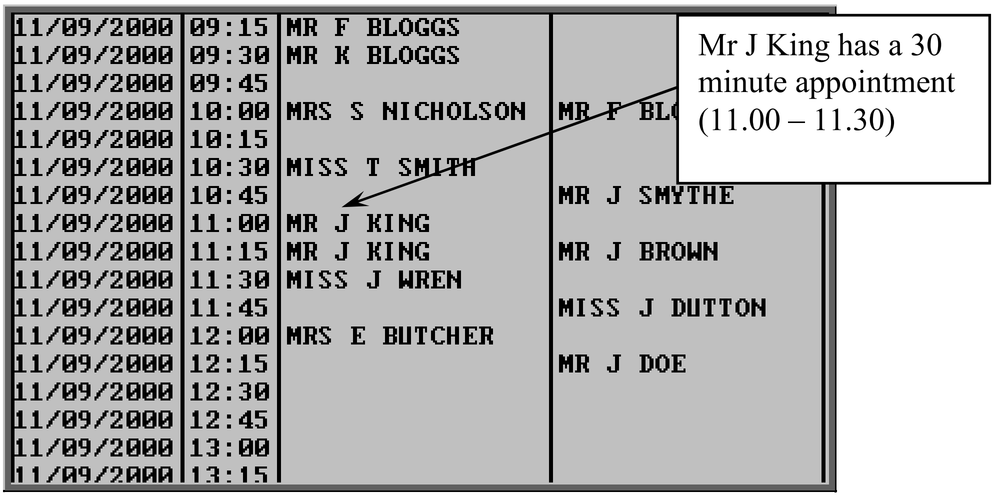
Menu: Appointments – Current – Diary

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 24. Choices - System).

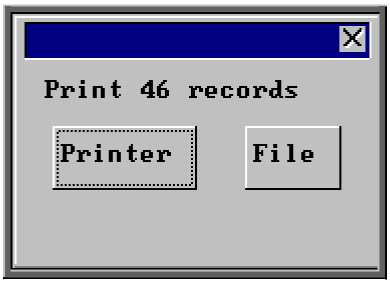
If your system default is set to 15 minutes and you have made an appointment for a patient of 30 minutes, their name will appear twice i.e. on each 15 min slot that covers the 30 minute appointment.



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 (Goto) and enter the new date.

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



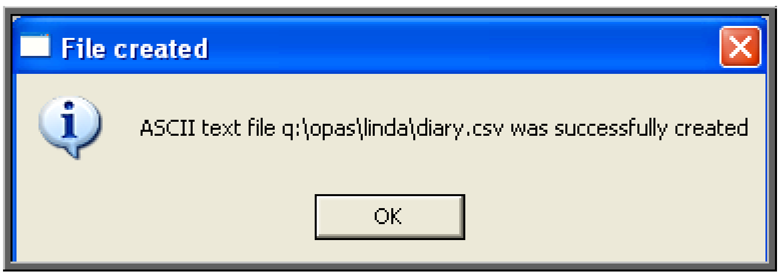
You have the option to print the report or send to a file for exporting into Lotus 123 or MS Excel

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

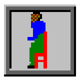
A comma separated variable file will be created called diary.csv. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

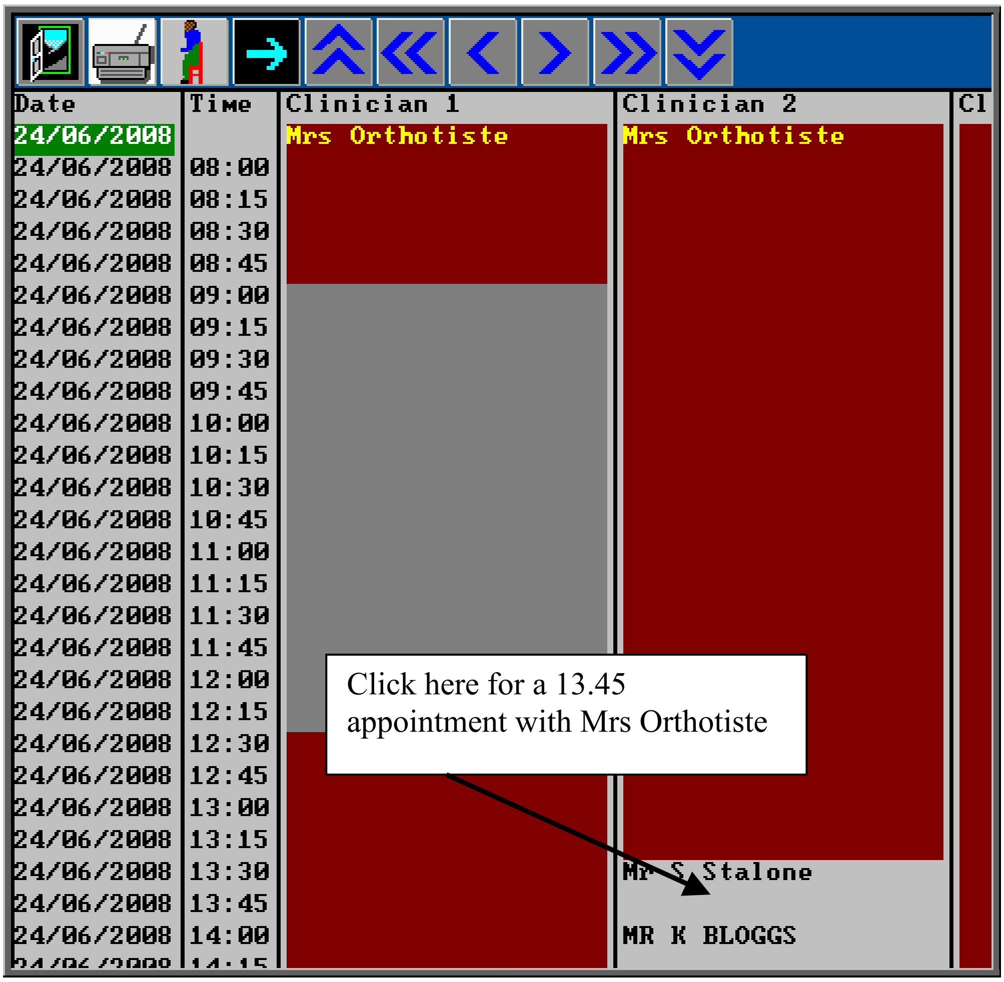


Making manual appointments via the Diary screen.

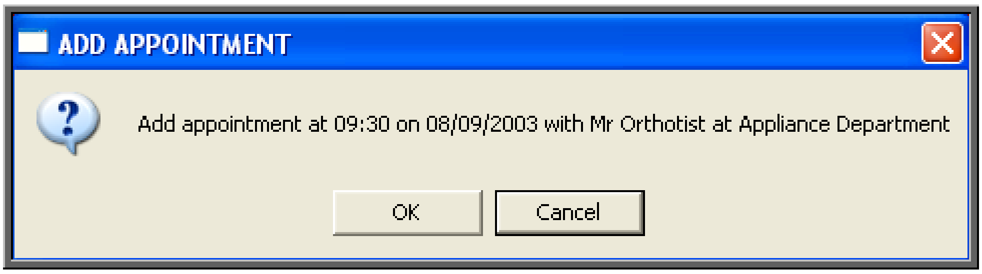
The Diary screen isn't as flexible as the Session screen, in that you can not make appointments outside the clinic times or double book appointment times. However, all sessions for the same day are shown on one screen, and it is easier to see availability.

The red area of the screen represents times outside the clinic hours, whereas the lighter grey area is available for making appointments. The darker grey area indicates that the session is blocked. 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  (Appoint), and then click with the mouse by the slot you wish to take.



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



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

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

Patient — select the patient from the pop-up list

If a this point, you discover that the patient hasn't yet been registered on OPAS and therefore they are not in the pop-up list, press **Esc** and type **N** to abandon the appointment screen.

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

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

Purchaser — if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press **Tab** to show 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.

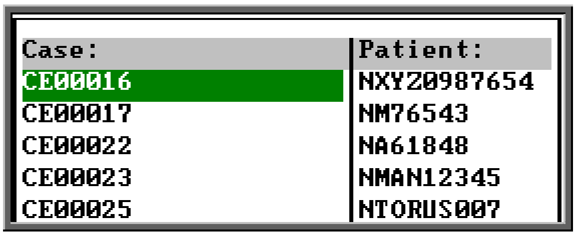
Comments additional comments can be entered here. These do not appear on appointment letters but can be printed on clinic lists.

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 20 – Appointments – Auditing appointments). The *Event* field can also be used for assigning RTT actions (see Care Episodes – Note 9. 18 Week Journey).

Letter will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities - Note 15. Choices - Letters)

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

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



Move the green cursor into the Patient: column and type in the patients Hospital number to show the care episodes for that patient.

New enter Y if this is a new patient, or N if they have been seen before.

Alternatively select

- S for supply
- F for fit
- R for review
- C for cast

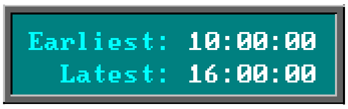
Type enter either

- O for an Out-patient
- I for an In-patient
- W for a Walk-in patient

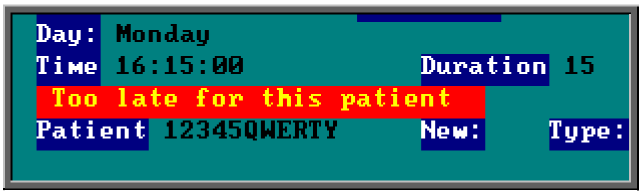
(Note: When an appointment is created for a walk in patient, the *Outcome* field will automatically be marked as Attended)

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

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.

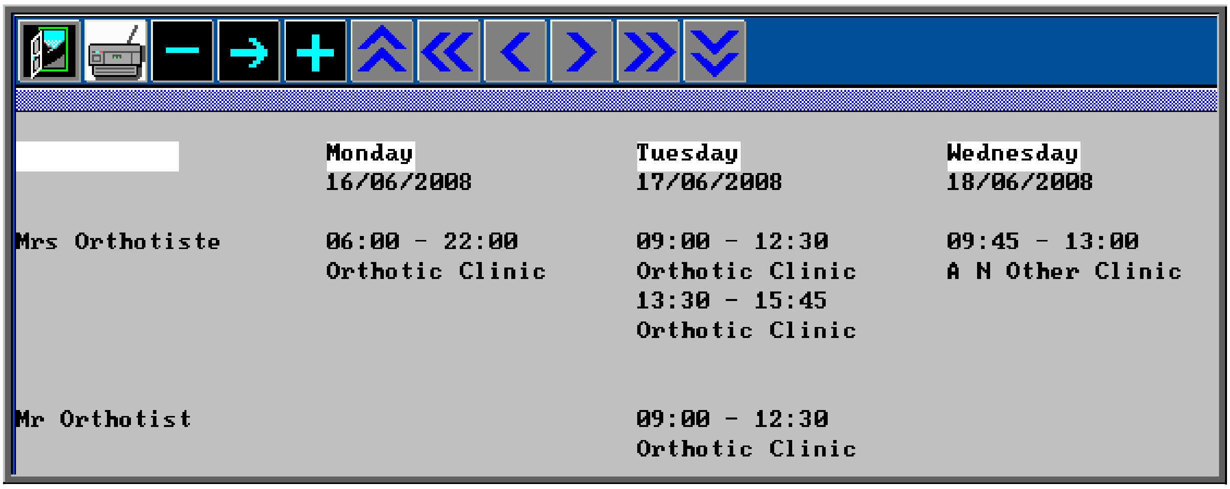


Having been given the warning message, if you continue to make the appointment anyway, the message will dissapear when you have finished filling in the appointment details.

26. Overview

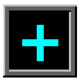
Menu: Appointments – Current – Overview

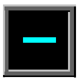
This shows a week of clinics, with details of the Clinicians' clinic times and venues.

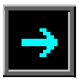


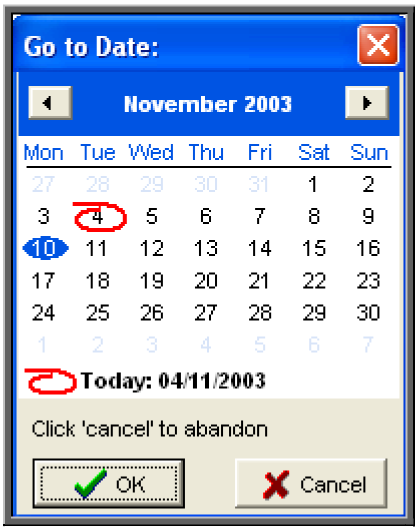
Use the cursor keys (**Right** & **Left**, **Up** & **Down**) to see further columns and rows.

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

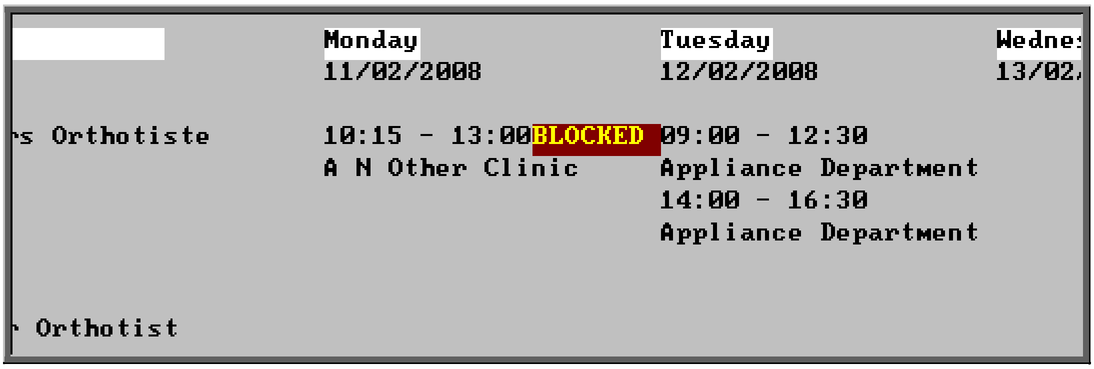
To see the following week, click on the 'plus' icon  (Week, Increase).

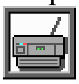
To see the previous week, click on the 'minus' icon  (Week, Decrease).

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



If a session that is showing in the overview is blocked, this will be highlighted with the BLOCKED banner by the side.



To print the overview for the week that you are looking at, click on the 'print' icon  (File, Print).

27. 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.

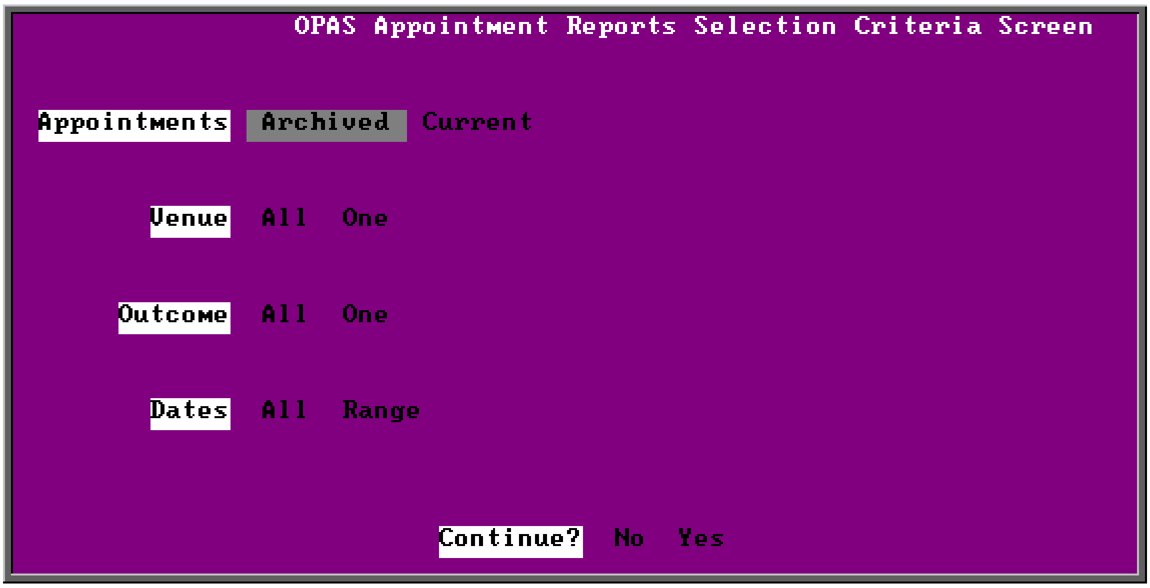
Clicking on the 'clinics' icon  or (Clinics) will take you to the Sessions screen, where you will be able to access all clinic dates for that Clinician. You will be initially taken to the next session for the Clinician but you can move between clinic dates in the usual way.

28. 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.



Appointments

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

Venue

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

Outcome

Select All	if all Outcomes are to be included

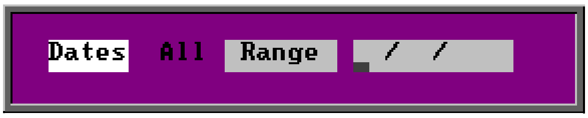
Select One — if only one Outcome is to be included on the report. Use the space bar on your keyboard to move the highlight from All to One and press **Enter**. A pop-up list will appear for you to make your selection from. Your selection will appear on the screen.

Dates

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

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

Type the start date in the space provided in the format DD MM YYYY and press **Enter**.



Now type in the end date in the next space in the format DD MM YYYY and press **Enter**.

Continue

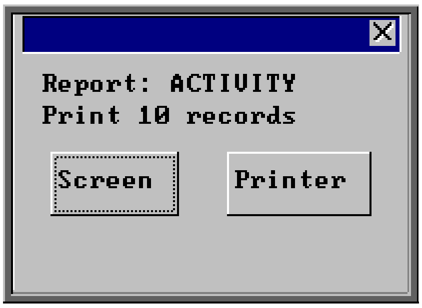
Select No — if you wish to abandon the Ad hoc report screen

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 can show for each venue what type of appointment were seen and the outcomes for those appointments



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, 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.

Below is an example of the **Activity** report.

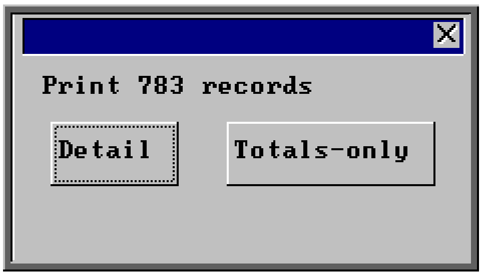
Appointment Activity Report

	Total	New	Supply	Fit	Review	Cast	Other	Attended	DNA
Orthotic Clinic	789	57	7	85	7	4	629	461	30
New Clinic	36	4			2		30	27	4
Test	7						7	6	1
A N Other Clinic	5				1		4	1	1
Diabetic Foot Clinic	3						3	1	1

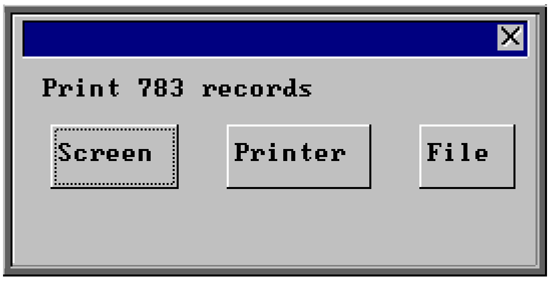
The report layout (activity.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

List

The List report will show all the appointments that matched the criteria and include arrived and seen times. This report will only work if archived appointments are being analysed.



You will be shown how many appointments OPAS has found and ask if you want to see the information in Detail i.e. a line for each order or just Totals-only



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.

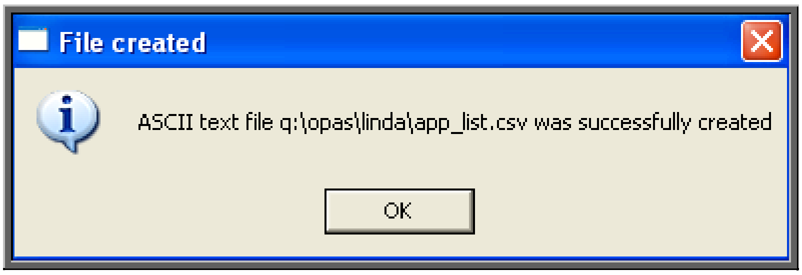
Below is an example of the List report in Detail.

clinicv	Patient	Date:	Time	Arrived:	Seen:
Orthotic Clinic	NG1010589	01/05/2003	09:15:00		
Orthotic Clinic	NG0324777	13/05/2002	09:15:00		
Orthotic Clinic	NTCRUS007	29/02/2000	09:15:00	09:15:00	10:05:00
Orthotic Clinic	NTCRUS009	14/02/2008	09:15:00		
Orthotic Clinic	NLKP12345	04/11/1999	09:15:00	09:00:00	10:25:00
Orthotic Clinic	NAB123456	25/03/2008	09:15:00		
Orthotic Clinic	NG3350674	26/02/2001	09:15:00	09:10:00	09:20:00

The report layout (app_list.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



29. Reports - Batches

All the batch appointment reports (except the No Outcome and 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 21. Archiving sessions).

1. Bookings

This report interrogates the information entered in the booking fields.

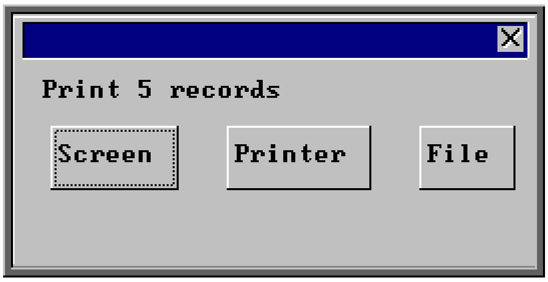
Menu: Reports – Appointments – Batches – Bookings or

Menu: Appointments – Print – Reports – Batches – Bookings

- 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

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.

Below is an example of the **Bookings** report.

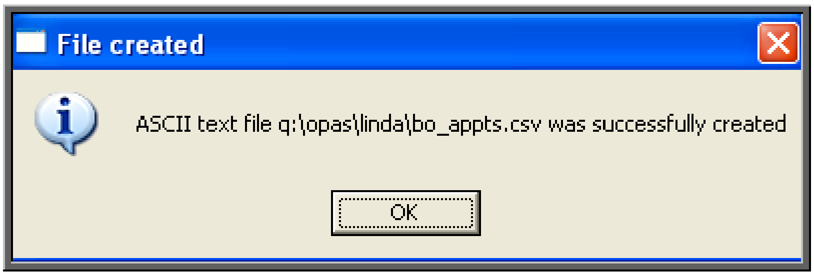
New User NHS Trust
ORTHOTIC DEPARTMENT BOOKING PROGRAMME

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

The report layout (bo_appts.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

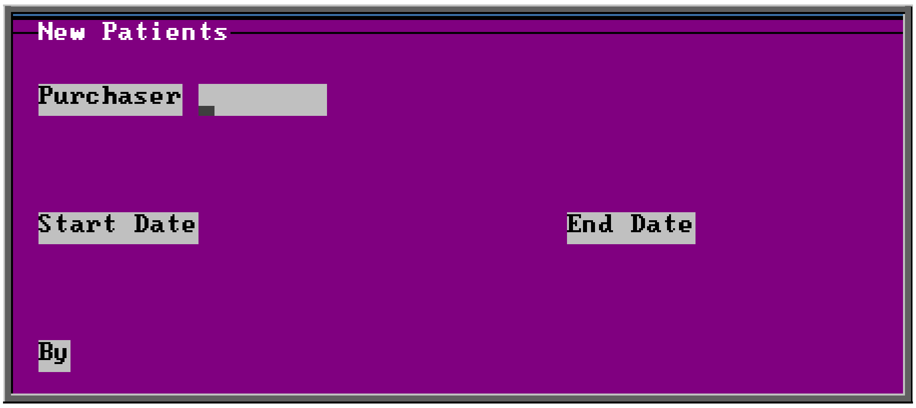


2. New Patients

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.

Menu: Reports – Appointments – Batches – New Patients or

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

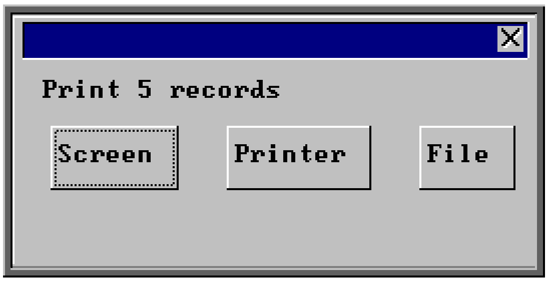


- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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

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.

Below is an example of the **New Patients** report selecting Directorate.

New Patient Appointments by Directorate
01/01/2000 - 04/07/2008

Directorate	Total	Attended OP	Attended IP	Attended Other	DNA OP	DNA IP	DNA Other
General	2	1					
PCT	51	25		1	4		
Trauma & Orthopaedic	1	1					

The report layouts (np_apptc/d/r/v.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

np_appc.csv	if run by clinician
np_appd.csv	if run by directorate
np_appr.csv	if run by referrer
np_appv.csv	if run by venue

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

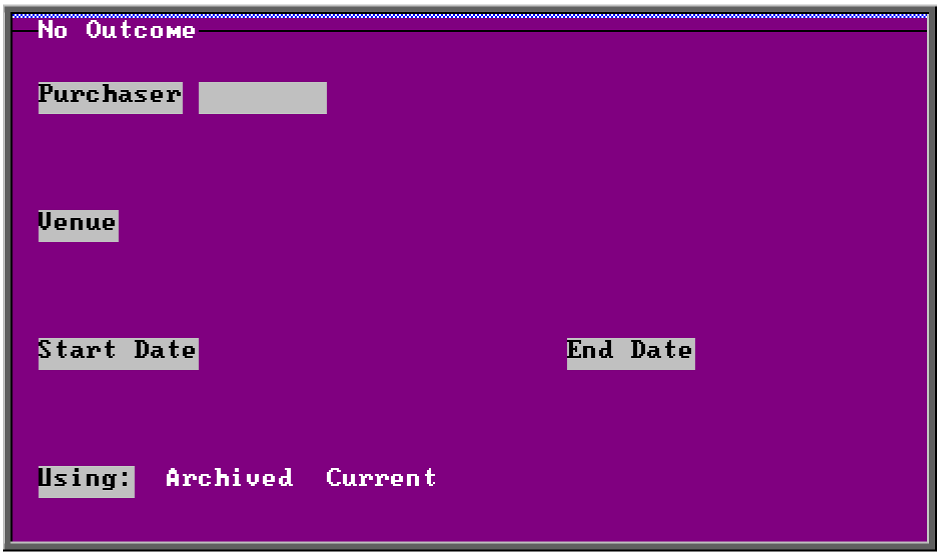
3. No Outcome

This report will show which appointments have had no outcome recorded.

The report can be used for either current or archived appointments.

Menu: Reports – Appointments – Batches – No Outcome or

Menu: Appointments – Print – Reports – Batches – No Outcome



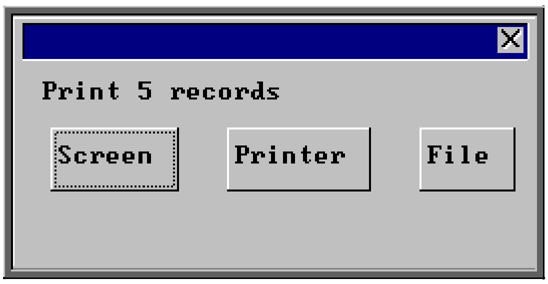
- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- select the Venue required 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

- select whether the report period is for Archived or Current appointments



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.

Below is an example of the No Outcome report.

Appointments without Outcomes

Session	Date	Time:	Patient
2846	29/11/2007	11:20	NG0825852
2846	29/11/2007	11:40	NG8904425
2846	29/11/2007	15:00	NG8404152
2846	29/11/2007	14:30	NG0606286
2846	29/11/2007	14:15	NG0819725
2846	29/11/2007	14:50	NG0606286

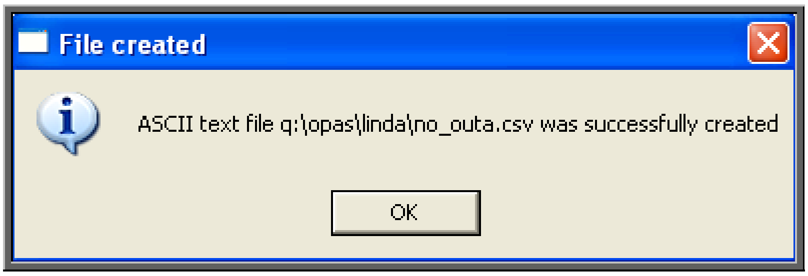
The report layout (no_out.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

no_outa.csv	if run for archived appointments
no_outc.csv	if run for current appointments

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



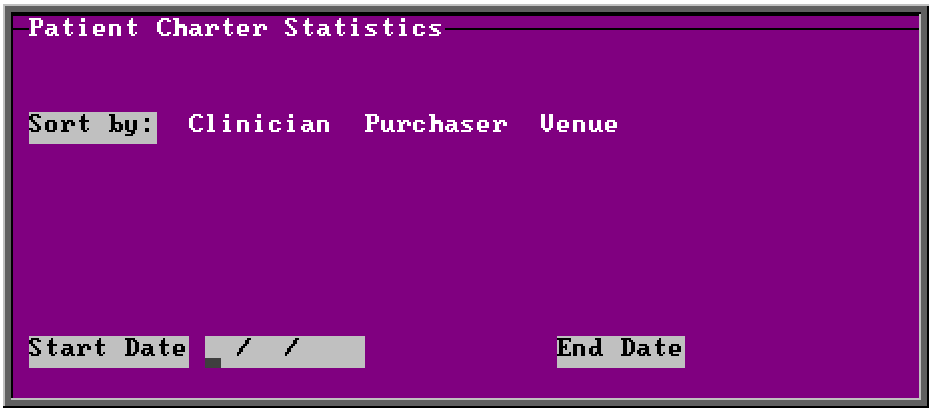
4. Patient Charter Stats

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 (seen within half an hour of arrival if they arrived after their appointment time).

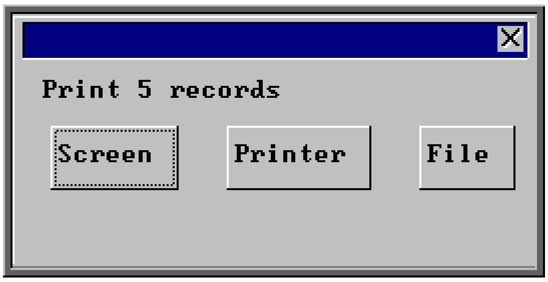
The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

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

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



- select how you wish the information to be displayed i.e. by Clinician, Purchaser or Venue
- 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.

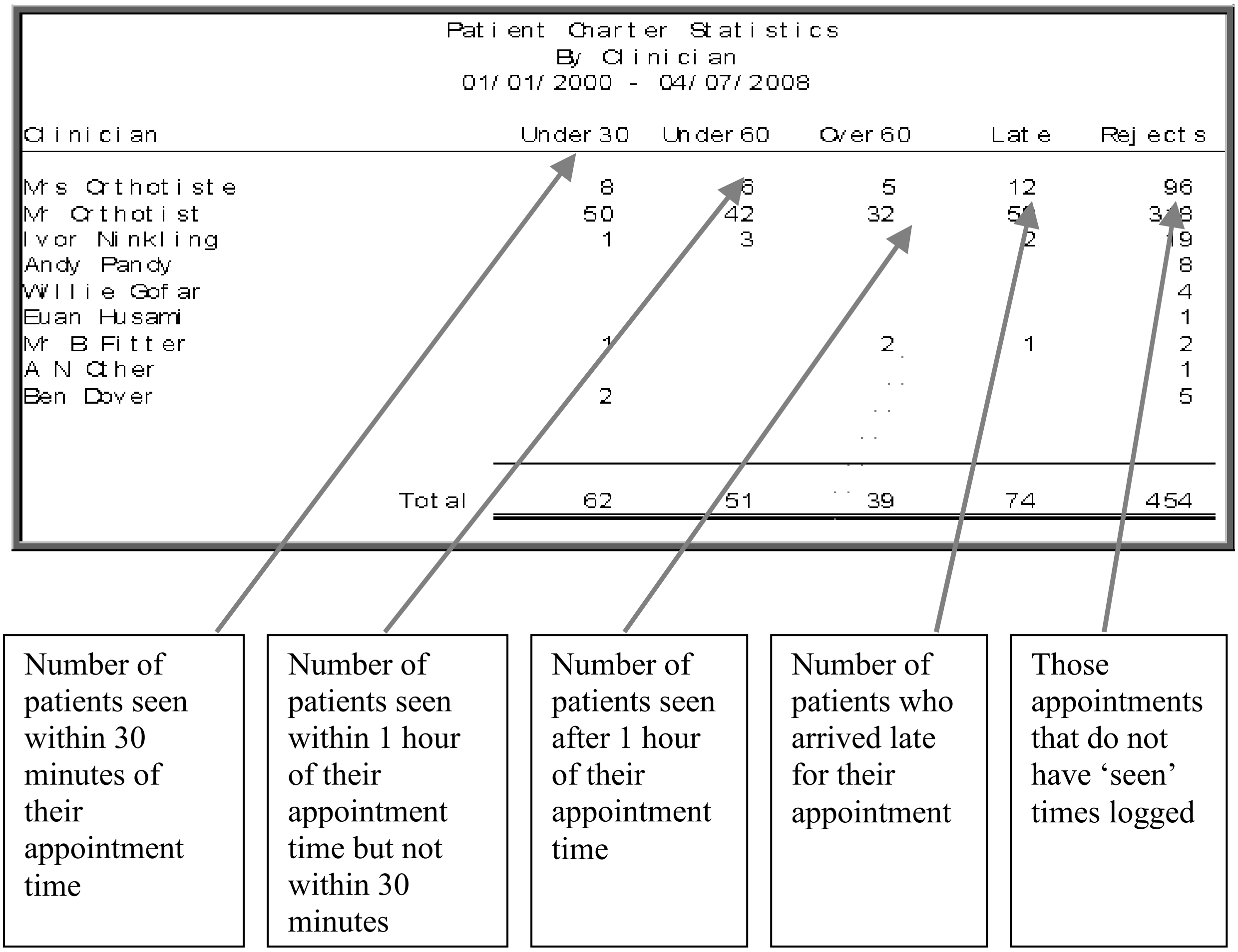
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Patient Charter Stats report selecting Clinician.



Patient Charter Statistics
By Clinician
01/01/2000 - 04/07/2008

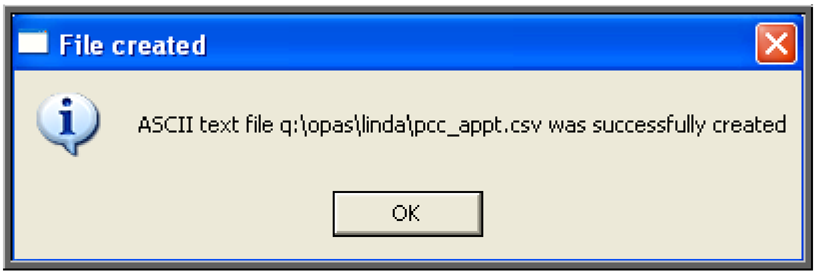
Clinician	Under 30	Under 60	Over 60	Late	Rejects
Mrs Orthotiste	8	6	5	12	96
Mr Orthotist	50	42	32	5[illegible]	3[illegible]8
Ivor Ninkling	1	3		2	19
Andy Pandy					8
Willie Gofar					4
Euan Husami					1
Mr B Fitter	1		2	1	2
A N Other					1
Ben Dover	2				5
Total	62	51	39	74	454

File

A comma separated variable file will be created called

pcc_appt.csv	if run by clinician
pcp_appt.csv	if run by purchaser
pcv_appt.csv	if run by venue

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



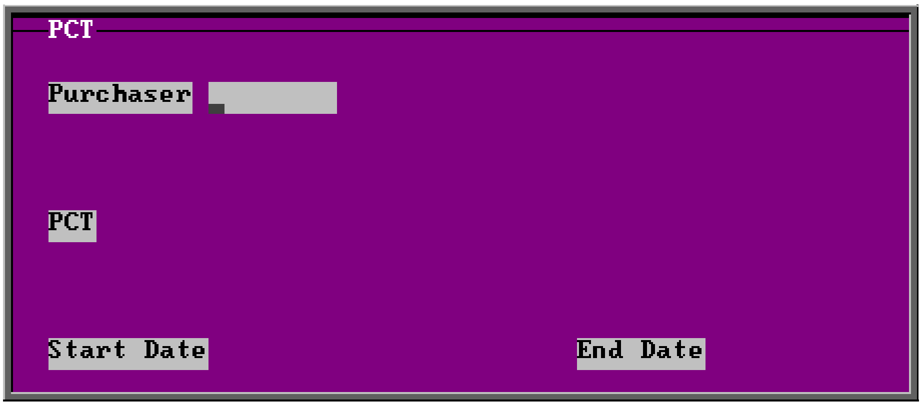
5. PCT

This report will provide a breakdown of PCT activity. An appointment report providing a summary of PCT activity is available in Reports – Appointments – Summaries.

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

Menu: Reports – Appointments – Batches – PCT or

Menu: Appointments – Print – Reports – Batches – PCT

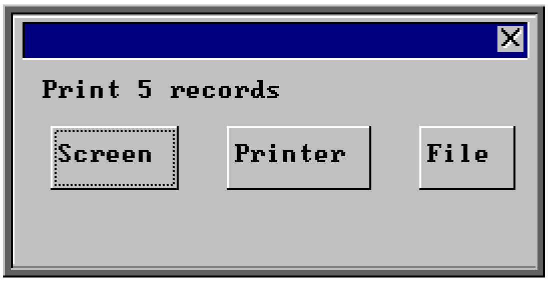


- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- select the PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs 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

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.

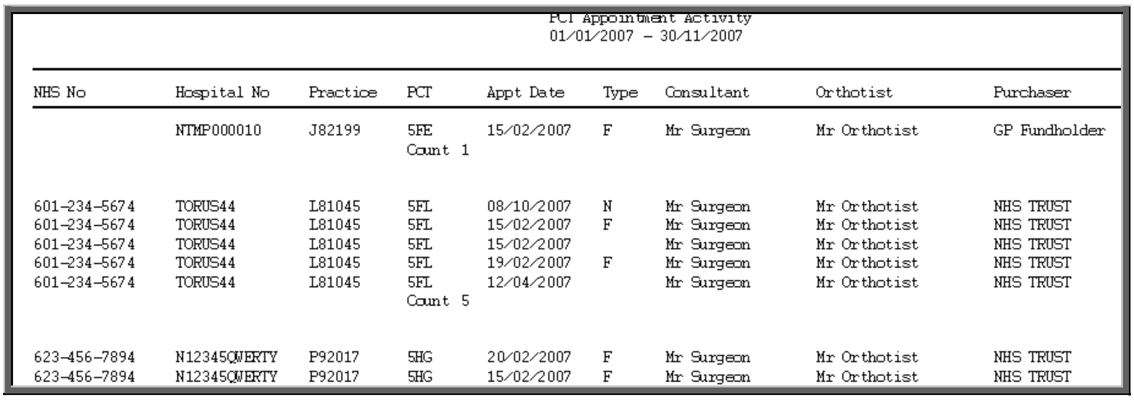
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the PCT report.



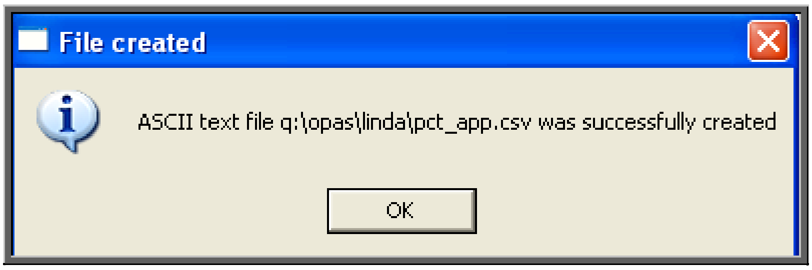
PCT Appointment Activity
01/01/2007 – 30/11/2007

NHS No	Hospital No	Practice	PCT	Appt Date	Type	Consultant	Orthotist	Purchaser
	NTMP000010	J82199	5FE	15/02/2007	F	Mr Surgeon	Mr Orthotist	GP Fundholder
			Count 1					
601-234-5674	TORUS44	L81045	5FL	08/10/2007	N	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	15/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	15/02/2007		Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	19/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	12/04/2007		Mr Surgeon	Mr Orthotist	NHS TRUST
			Count 5					
623-456-7894	N12345QWERTY	P92017	5HG	20/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
623-456-7894	N12345QWERTY	P92017	5HG	15/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST

The report layout (pct_app.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



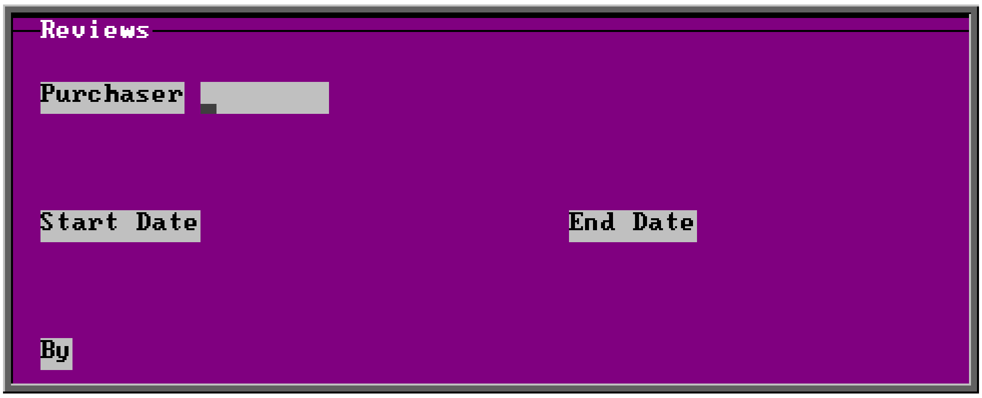
6. Reviews

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 anything other than Y entered.

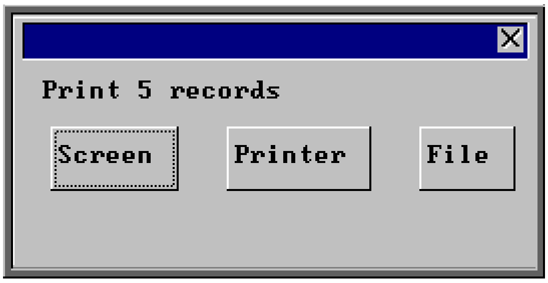
The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

Menu: Reports – Appointments – Batches – Reviews or

Menu: Appointments – Print – Reports – Batches – Reviews



- 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

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.

Below is an example of the Review report selecting Direcorate.

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		

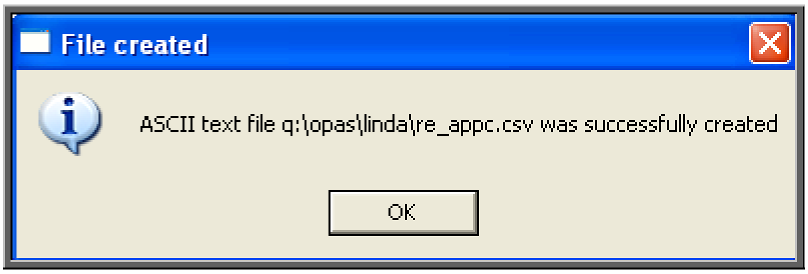
The report layouts (re_apptc/d/r/v.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

re_appc.csv	if run by clinician	re_appr.csv	if run by referrer
re_appd.csv	if run by directorate	re_appv.csv	if run by venue

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



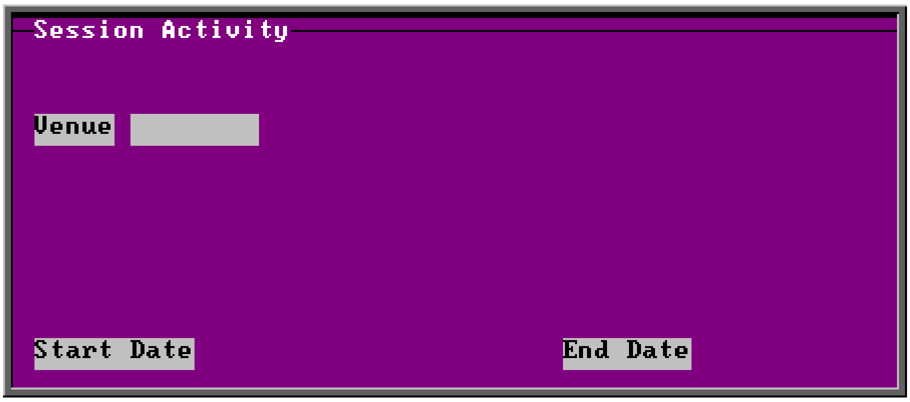
7. Sessions

This report is will provide a breakdown of session activity. (This replaces the session report that used to be within the ad hoc menu)

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

Menu: Reports – Appointments – Batches – Sessions or

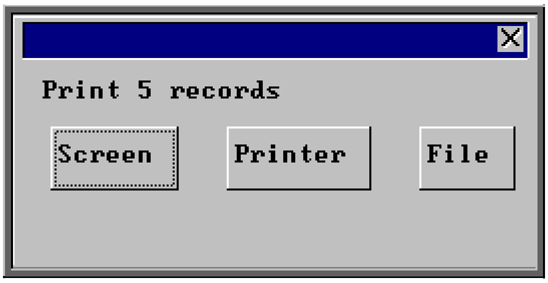
Menu: Appointments – Print – Reports – Batches – Sessions



- select the Venue required 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

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.

Below is an example of the Session report.

Sessions Report
All Venues
01/01/2007 - 01/12/2007

Venue	Monday	Tuesday	Wednesday	Thursday	Friday	Weekend	All
Appliance Department	56	88	14	43	13		214
MARTINS NOT SO SPECIAL CLINIC		1	1				2
Grand Total	56	89	15	43	13	0	216

The report layout (se_appts.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

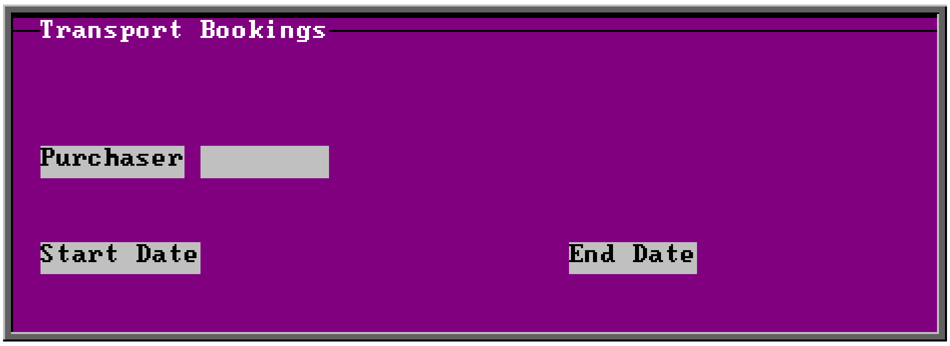
A comma separated variable file will be created called se_appts.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

8. Transport

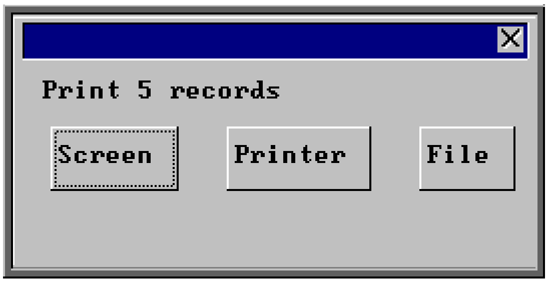
Unlike the other batch appointment reports, this report will only look at current appointments, as the purpose of this report is to see current bookings that have been made.

Menu: Reports – Appointments – Batches – Transport or

Menu: Appointments – Print – Reports – Batches – Transport



- 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

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.

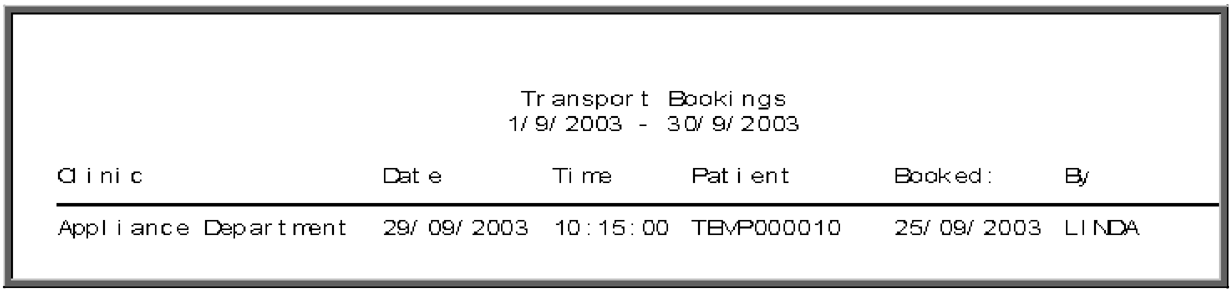
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

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	TEMP000010	25/09/2003	LINDA

The report layout (tr_appts.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

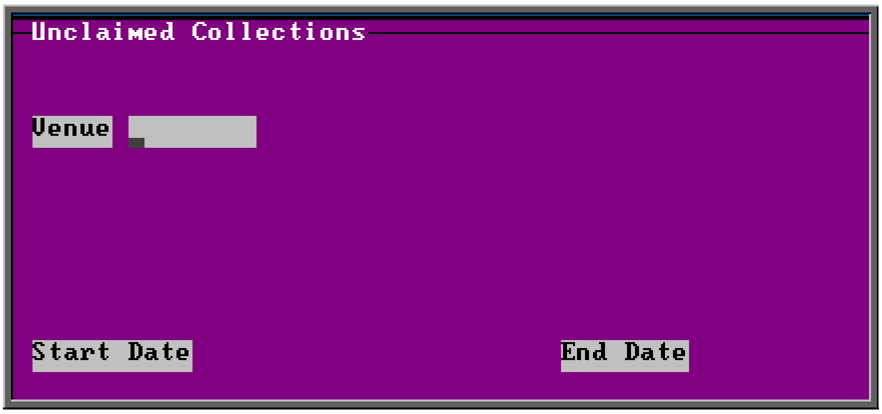
A comma separated variable file will be created called tr_appts.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

9. Uncollected

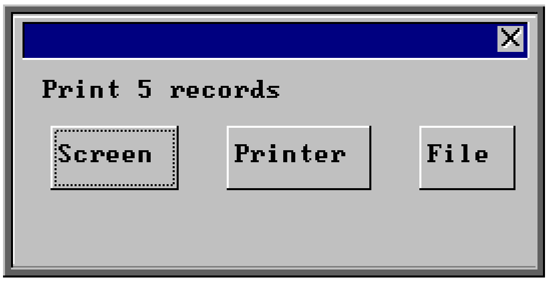
This report has two functions. Firstly it will report on those orders where the goods have not been collected, and then secondly, give you the option to send a reminder collection letter to those patients. OPAS determines which orders have not been collected by looking for orders where the ACO field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

Menu: Reports – Appointments – Batches – Uncollected or

Menu: Appointments – Print – Reports – Batches – Uncollected



- select the Venue 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

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.

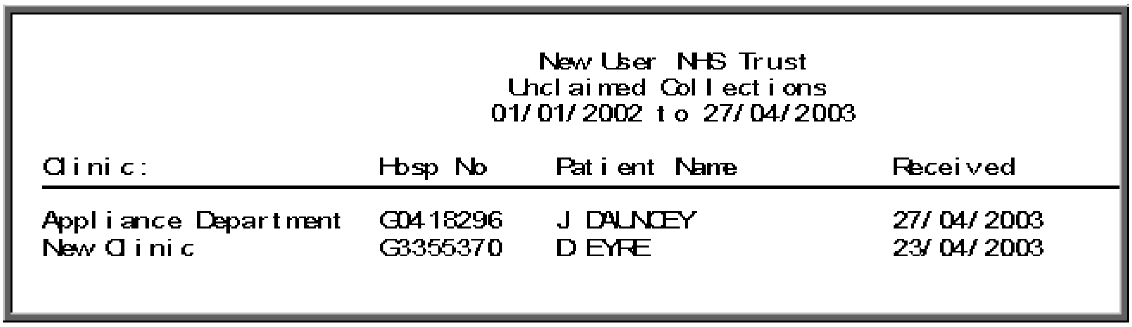
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

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 DAUNCEY	27/04/2003
New Clinic	G3355370	D EYRE	23/04/2003

The report layout (bat_ucol.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

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.

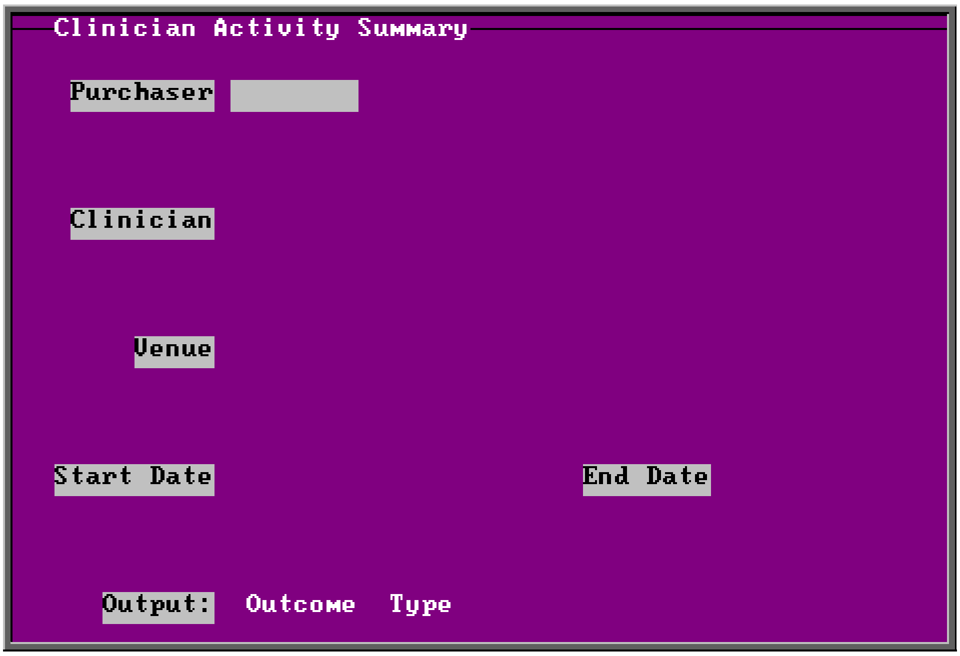
30. Reports – Summaries

All these batch summary appointment reports work on archived information, so ensure the appointments for the period you wish to report on has been archived (see Appointments – Note 21. Archiving sessions). The summary reports can be run to analyse appointment type or appointment outcome.

1. Clinician

Menu: Reports – Appointments – Summaries – Clinician or

Menu: Appointments – Print – Reports – Summaries – Clinician



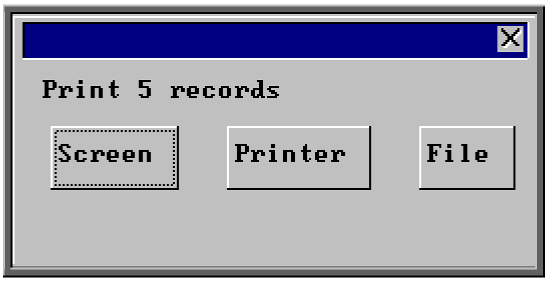
- select the Purchaser required from the pop-up list. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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

- 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

- select whether the report should analyse by Outcome or Type



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.

Below is an example of the Clinician report selecting Outcome.

New NHS Trust
Clinician Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

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

Clinician	Total	Time	%age	0	1	2	3	4	5	6	Collect
Ben Dover	8	225	2.2%		8						
Mr B Fitter	5	180	1.8%		5						
Willie Gofar	4	60	0.6%		4						
Euan Husami	1	15	0.1%		1						
Ivor Ninkling	24	355	3.5%	9	14				1		
Mr Orthotist	551	7240	72.3%	136	312	24	42		37		28
Mrs Orthotiste	129	1800	18.0%	45	63	9	2		10		23
A N Other	1	15	0.1%		1						
Andy Pandy	8	120	1.2%		7	1					1
Grand Total	731	10010		190	415	34	44	0	48	0	52

Count 9

Below is an example of the Clinician report selecting Type

Clinician Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Clinician	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
Ben Dover	8	225	2.2%						5	2	1
Mr B Fitter	5	180	1.8%	1					4		
Willie Gofar	4	60	0.6%	1					3		
Euan Husami	1	15	0.1%						1		
Ivor Ninkling	24	355	3.5%	2		4			17	1	
Mr Orthotist	551	7240	72.3%	39	9	72	8	2	412	32	5
Mrs Orthotiste	129	1800	18.0%	19	1	8		2	117	5	
A N Other	1	15	0.1%						1		
Andy Pandy	8	120	1.2%			1			8		
Grand Total	731	10010		62	10	85	8	4	568	40	6

Count 9

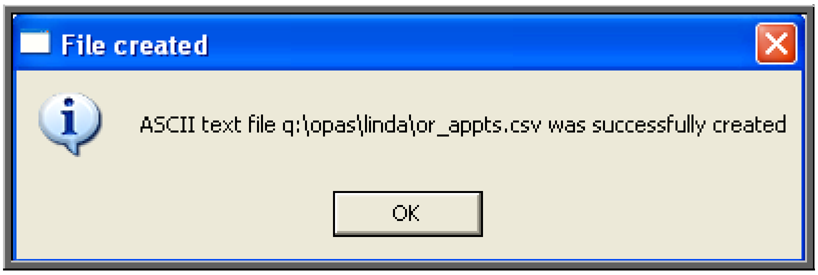
File

A comma separated variable file will be created called

or_appts.csv if analysed by outcome

ot_appts.csv if analysed by type

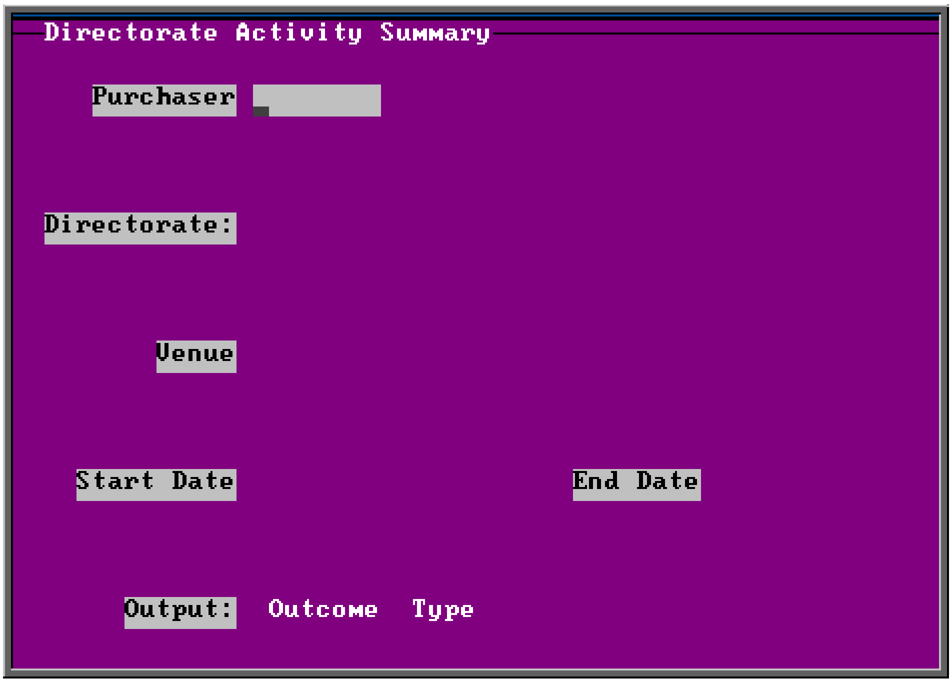
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



2. Directorate

Menu: Reports – Appointments – Summaries – Directorate or

Menu: Appointments – Print – Reports – Summaries – 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

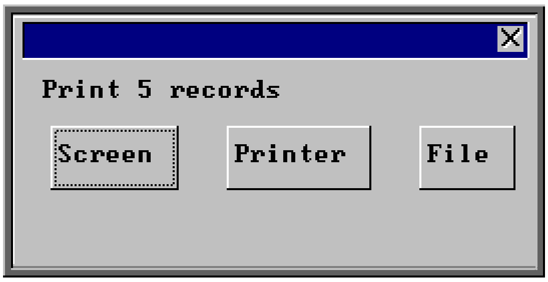
- select a Directorate from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Directorate field empty will result in all directorates being selected

- 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

- select whether the report should analyse by Outcome or Type



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

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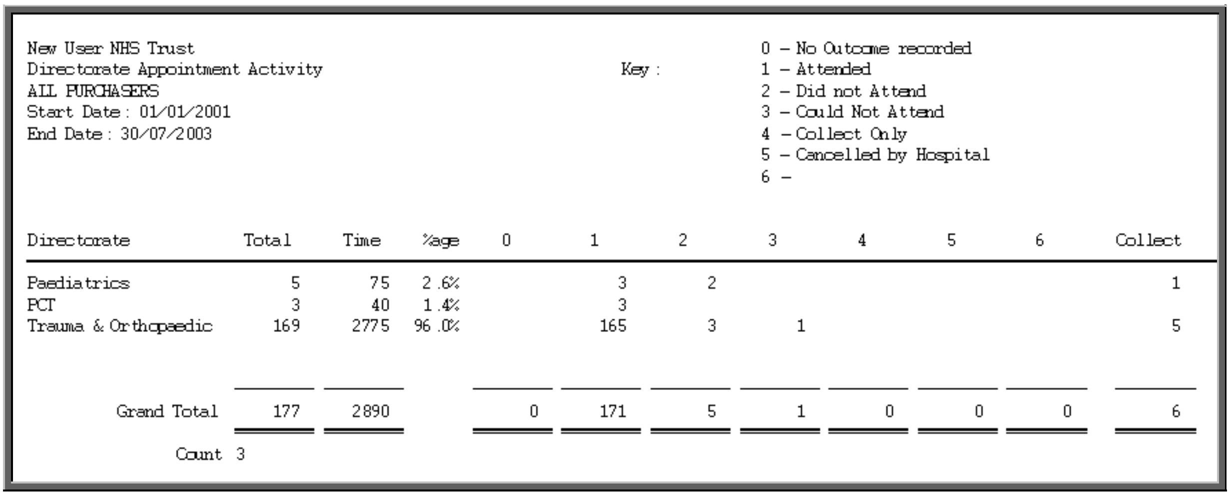
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Directorate report selecting Outcome.



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

Below is an example of the Directorate report selecting Type

Directorate Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Directorate	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
	62	655	6.5%	2	2	1	1	1	79		2
General	22	295	2.9%	3	2	7	3		8		
PCT	635	8835	88.3%	56	6	74	3	3	474	40	4
Trauma & Orthopaedic	12	225	2.2%	1		3	1		7		
Grand Total	731	10010		62	10	85	8	4	568	40	6

Count 4

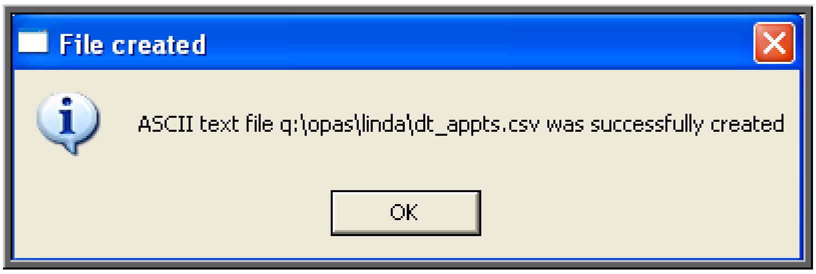
File

A comma separated variable file will be created called

di_appts.csv if analysed by outcome

dt_appts.csv if analysed by type

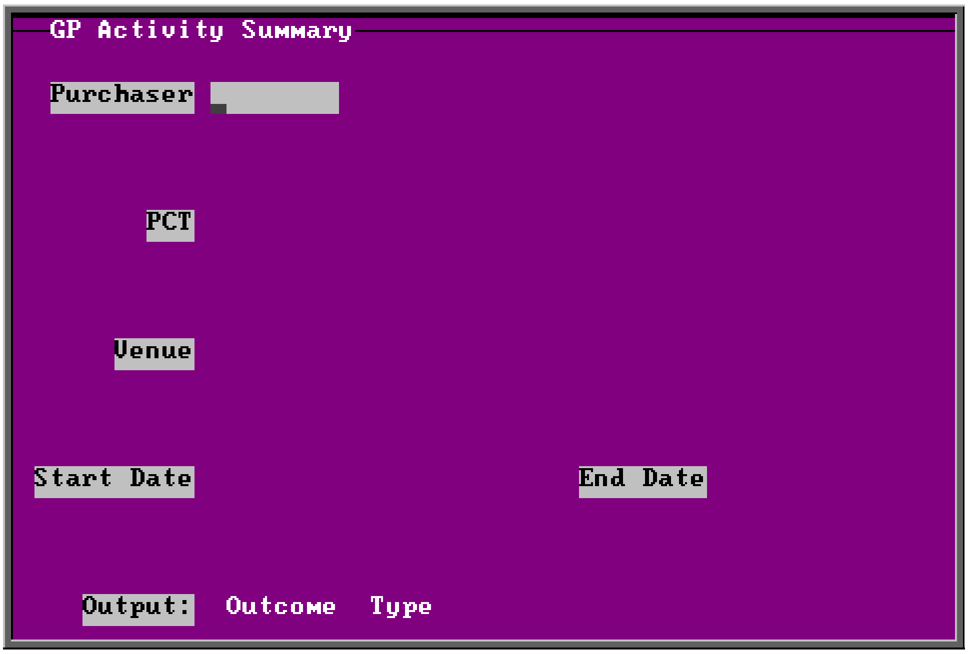
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



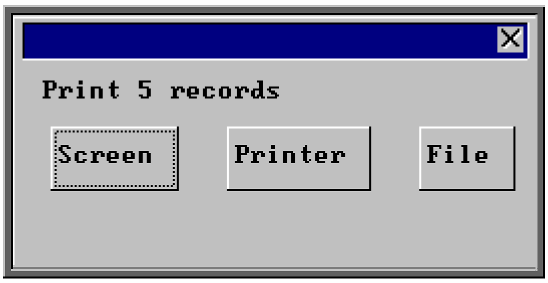
3. GP Activity

Menu: Reports – Appointments – Summaries – GP Activity or

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



- 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 PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected
- select the Venue required 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
- select whether the report should analyse by Outcome or Type



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.

Below is an example of the GP Activity report selecting Outcome.

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
		95	1650		92	3					
G0230753	BENNET RB	1	15		1						
G2313537	WOOLAS KD	6	90		6						
G3291821	LIEBERT IJ	24	350		24						2
G3305708	BRACE CA	1	15		1						
G3316902	HUSSAIN S	1	15		1						
G3355370	EYRE DH	1	30		1						3
G3399279	WORTHINGTON JRM	1	15		1						
G3399420	PENRICE GJ	1	15		1						
G3408120	DONALDSON TJ	1	15		1						
G8102216	MAITI SK	3	45		3						
G8203801	JONES IP	4	60		4						
G8409872	SCHUMM 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				

Below is an example of the **GP Activity** report selecting **Type**

New NHS Trust
GP Appointment Activity
ALL PURCHASERS
ALL PCTS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

GP Ref	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
	241	3635	36.3%	22	5	15	3	2	208		6
G0102005 ALLEN EB	1	15	0.1%						4		
G0102926 ANDERSON MG	2	30	0.3%			1			1		
G0107725 ALEXANDER PJ	8	30	0.3%						6	2	
G0110134 ALLEN JP	1	15	0.1%						1		
G0218616 BROOKES M	2	45	0.4%	1		1			4		
G0230753 BENNET RB	2	15	0.1%						2		

File

A comma separated variable file will be created called

gp_appts.csv if analysed by outcome

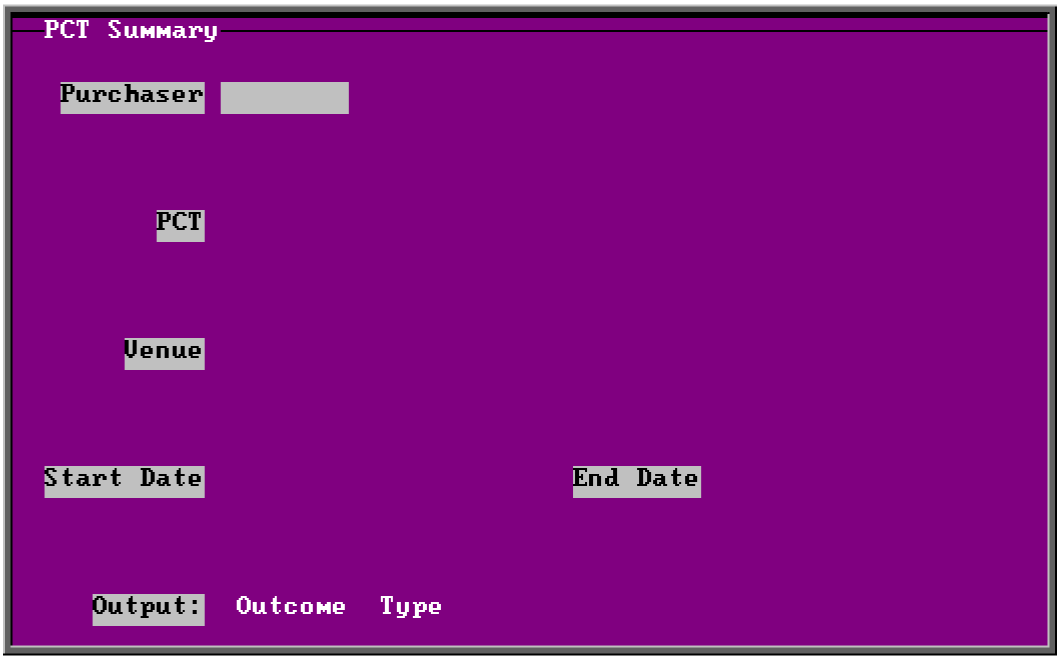
gt_appts.csv if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

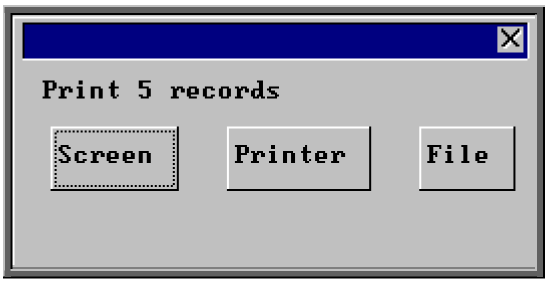
4. PCT

Menu: **Reports – Appointments – Summaries – PCT** or

Menu: **Appointments – Print – Reports – Summaries – PCT**



- 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 PCT required from the pop-up list. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected
- select the Venue required 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
- select whether the report should analyse by Outcome or Type



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.

Below is an example of the PCT report selecting Outcome.

New NHS Trust
PCT Appointment Activity
ALL PURCHASERS
ALL PCTS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

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

PCT		Total	Time	%age	0	1	2	3	4	5	6	Collect
		280	4045	40.4%	79	161	12	13		15		23
5A8	GREENWICH TEACHING PCT	2	15	0.1%	2							1
5EM	NOTTINGHAM CITY PCT	1	15	0.1%	1							
5FE	PORTSMOUTH CITY TEACHING PCT	1	15	0.1%	1							1
5FL	BATH AND NORTH EAST SOMERSET PCT	35	650	6.5%	11	15	3	3		3		

Below is an example of the PCT report selecting Type

New NHS Trust
PCT Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

PCT		Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward
		280	4045	40.4%	25	5	16	4	2	242	3
5A8	GREENWICH TEACHING PCT	2	15	0.1%	1		1			1	
5EM	NOTTINGHAM CITY PCT	1	15	0.1%						1	
5FE	PORTSMOUTH CITY TEACHING PCT	1	15	0.1%			1			1	
5FL	BATH AND NORTH EAST SOMERSET	35	650	6.5%	7		4			23	1

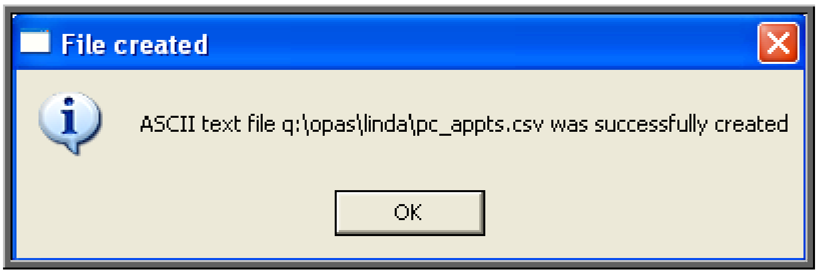
File

A comma separated variable file will be created called

pc_appts.csv   if analysed by outcome

pt_appts.csv   if analysed by type

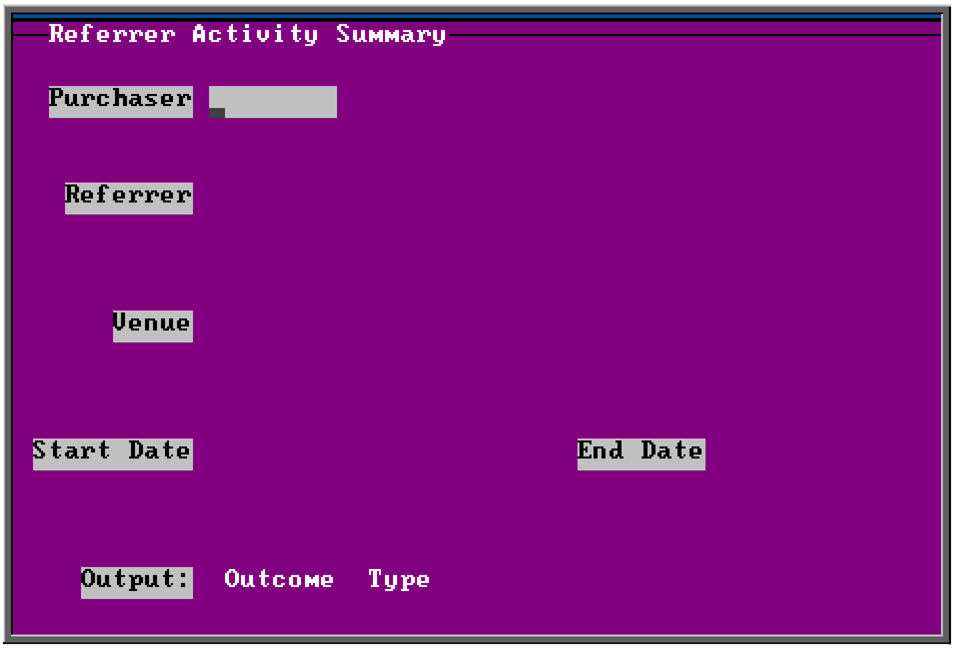
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



5. Referrers

Menu: Reports – Appointments – Summaries – Referrers or

Menu: Appointments – Print – Reports – Summaries – Referrers



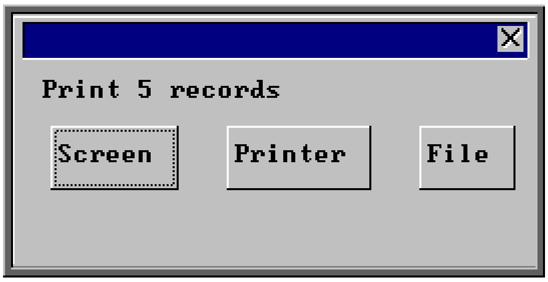
- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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

- select the Venue required 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
- select whether the report should analyse by Outcome or Type



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.

Below is an example of the Referrer report selecting Outcome.

New NHS Trust
Referrer Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

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

Referrer	Total	Time	%age	0	1	2	3	4	5
	60	640	6.4%	34	5	9	5		7
A N Other	29	430	4.3%	19	5	3	1		1
Direct Access GP	15	225	2.2%	11	3	1			
Mr Bloggs	2	15	0.1%	1					1
Mr N Parrish	4	40	0.4%		3		1		
mr smith	5	90	0.9%		5				
Mr Surgeon	616	8570	85.6%	125	394	21	37		39
Grand Total	731	10010		190	415	34	44	0	48

Count 7

Below is an example of the **Referrer** report selecting **Type**

New NHS Trust
Referrer Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Referrer	Total	Time	%age	New	Review	Fit	Supply	Cast
	60	640	6.4%	1	2	1	1	1
A N Other	29	430	4.3%	3	2	10	4	
Direct Access GP	15	225	2.2%	2	2	4		
Mr Bloggs	2	15	0.1%	1				
Mr N Parrish	4	40	0.4%					
mr smith	5	90	0.9%	1				
Mr Surgeon	616	8570	85.6%	54	4	70	3	3
Grand Total	731	10010		62	10	85	8	4

Count 7

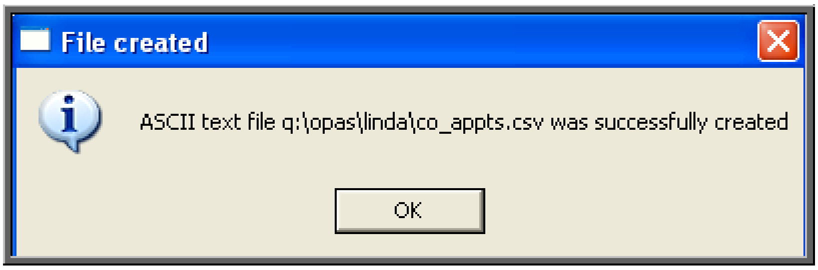
File

A comma separated variable file will be created called

co_appts.csv if analysed by outcome

ct_appts.csv if analysed by type

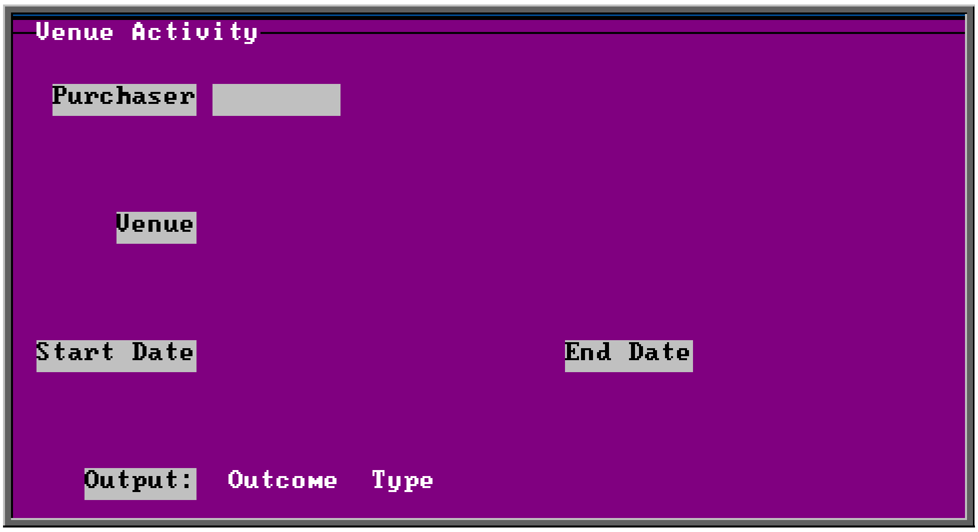
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



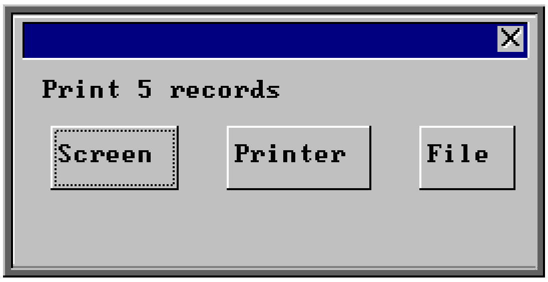
6. Venues

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

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



- 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
- select whether the report should analyse by Outcome or Type



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Screen

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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.

Below is an example of the Venue report selecting Outcome.

New NHS Trust
Venues Appointment Activity
ALL PURCHASERS
Start Date: 01/01/2000
End Date: 04/07/2008

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	%age	0	1	2	3
A N Other Clinic	5	90	0.9%	3	1	1	
Diabetic Foot Clinic	3	60	0.6%	1	1	1	
LINDAS SPECIAL CLINIC	11	165	1.6%		11		
MARTINS NOT SO SPECIAL CLINIC	1	10	0.1%		1		
New Clinic	30	630	6.3%	4	22	3	1
Orthotic Clinic	648	8355	83.5%	182	348	27	43
Test	7	100	1.0%		6	1	
TEST AREA	11	165	1.6%		11		
testing	14	420	4.2%		13	1	
Yet Another Test	1	15	0.1%		1		
Grand Total	731	10010		190	415	34	44

Count 10

Below is an example of the Venue report selecting Type

New NHS Trust
Venue Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Directorate	Total	Time	%age	New	Review	Fit	Supply	Cast	Other
A N Other Clinic	5	90	0.9%		1				4
Diabetic Foot Clinic	3	60	0.6%						3
LINDAS SPECIAL CLINIC	11	165	1.6%	1					10
MARTINS NOT SO SPECIAL CLINIC	1	10	0.1%						1
New Clinic	30	630	6.3%	4	2				27
Orthotic Clinic	648	8355	83.5%	55	7	85	7	4	494
Test	7	100	1.0%						7
TEST AREA	11	165	1.6%	1			1		11
testing	14	420	4.2%	1					10
Yet Another Test	1	15	0.1%						1
Grand Total	731	10010		62	10	85	8	4	568

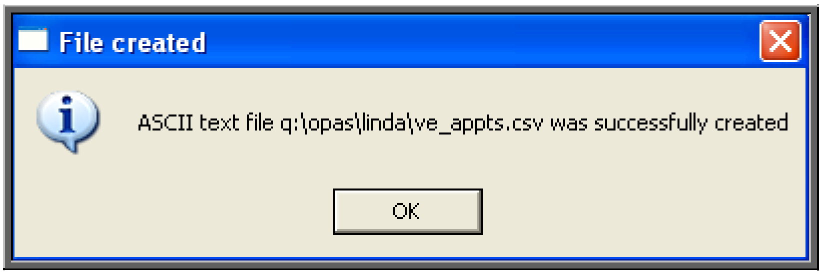
Count 10

File

A comma separated variable file will be created called

ve_appts.csv	if analysed by outcome
vt_appts.csv	if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



Stock Control

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 trusts 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

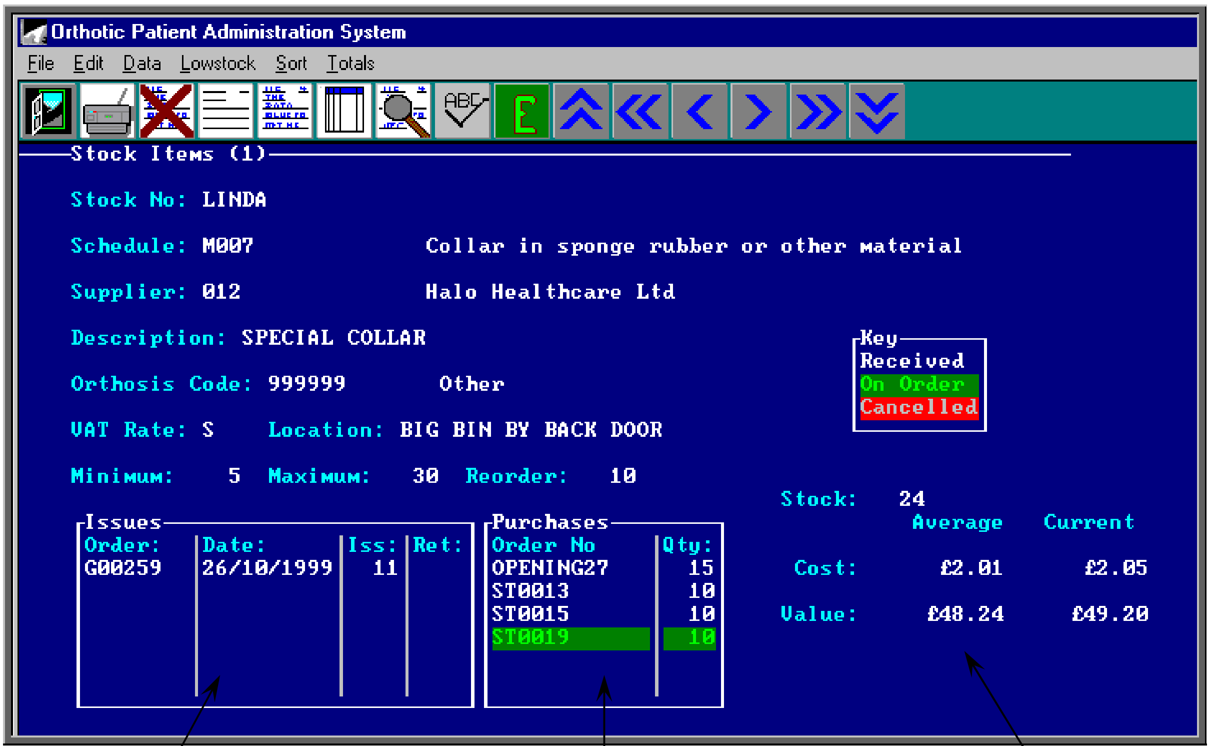
Menu: Stock Control – 1st System – Items

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



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

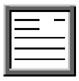
Each stock item shows a list of issues and purchases for that item, with transactions that are on order or cancelled shown in different colours, plus the current stock level and values.

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  (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 20 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

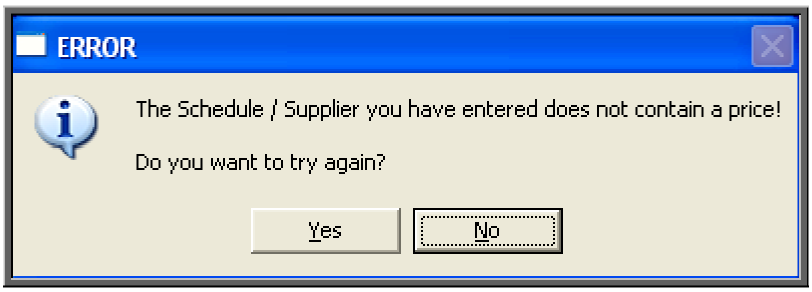
Upon selecting Yes, you will be taken into the Stock Item screen to complete the fields below. The message **Price not found for this item / supplier** will appear on the screen, but the message can be ignored at this stage.

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.

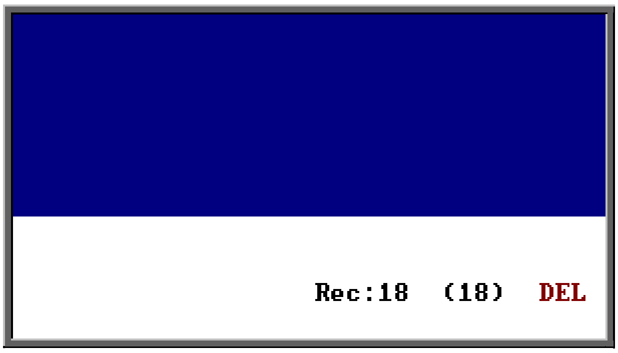
Note: If adding a new item and the supplier/item combination is not valid the following prompt will appear.



Click on Yes to return to the screen and try again.

To abandon the screen, click on No.

If the screen is abandoned, the incomplete stock item record will be marked as deleted (bottom right corner of the screen).



Once you have set a price up for the item and wish to update the item screen you will need to reactivate (undelete) the record by clicking on the ‘undelete’ icon  (Edit, Delete). Then the record can be updated.

However, take care – DO NOT choose to update the record before the price has been set in OPAS. Once you start editing the stock item screen you will not be able to exit the screen until all the fields are completed successfully.

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.

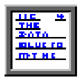
Maximum enter the maximum stock of this item that you wish to hold.

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 16. Stock transactions)

3. Updating a stock item

Menu: Stock Control – 1st System – Items

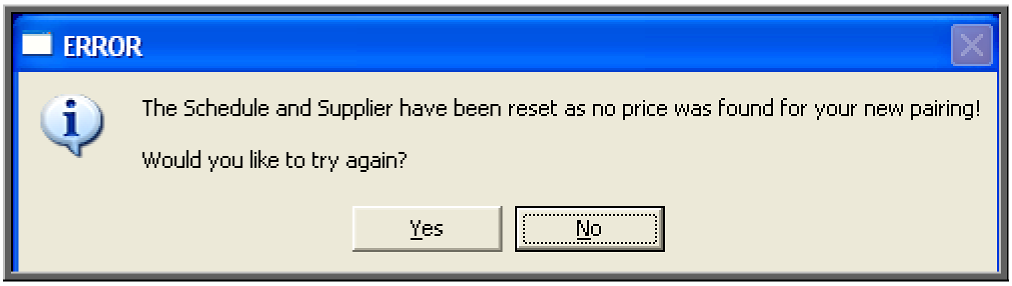
Find the relevant stock item and then click on the 'update' icon  (Edit, Update).

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:

Schedule	*Location*
Supplier	*Minimum*
Description	*Maximum*
Orthosis Code	*Reorder*
Vat Code	

If you update the *Schedule* and/or *Supplier* with an invalid combination the following prompt will appear.



To abandon the screen leaving the information as it was before, click on Yes. Click on No to return to the screen and try again.

Note: Amending your current stock level is achieved by adding a manual transaction (see Stock Control – Note 16. Stock transactions)

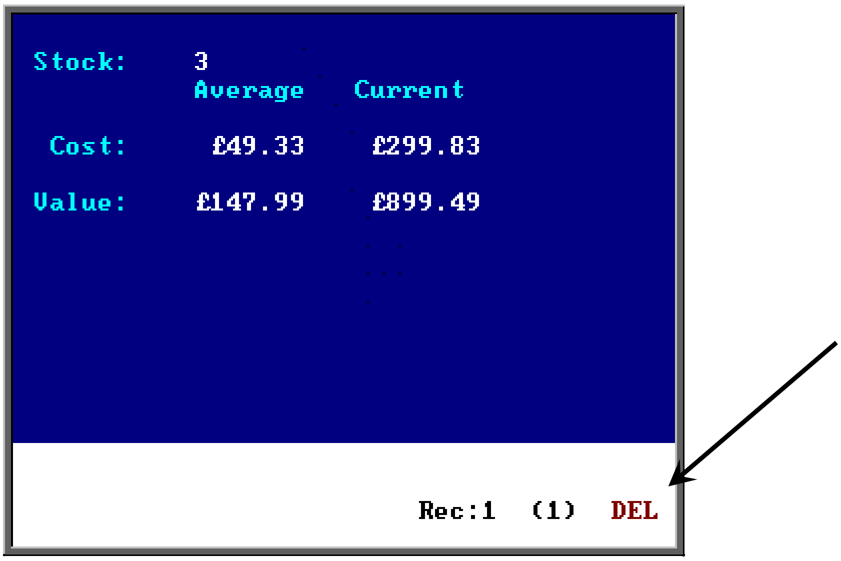
4. Deleting a stock item

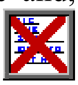
Menu: Stock Control – 1st System – Items

Find the relevant stock item and then click on the 'delete' icon  (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 stock item record is marked as deleted.



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

If you want to permanently remove the record, then having marked the record for deletion, click on Edit and select Krunch. This procedure cannot be reversed and will permanently remove all stock items that are marked as deleted. It will not, however, remove any orders where the item was used and issues and purchases of that item can still be seen in Stock Control – 1st System – Transactions.

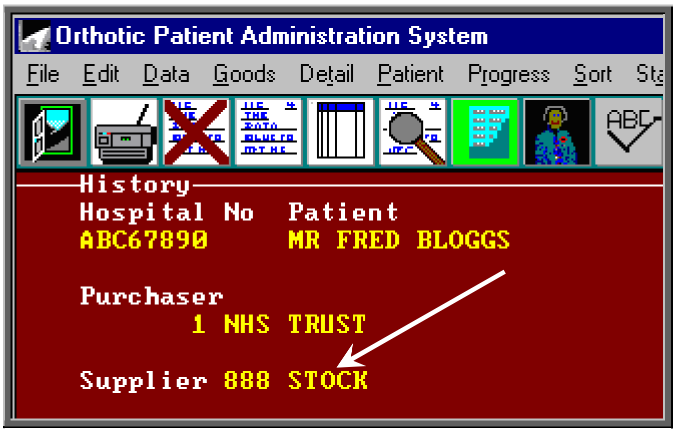
5. Issuing stock

Menu: Patients

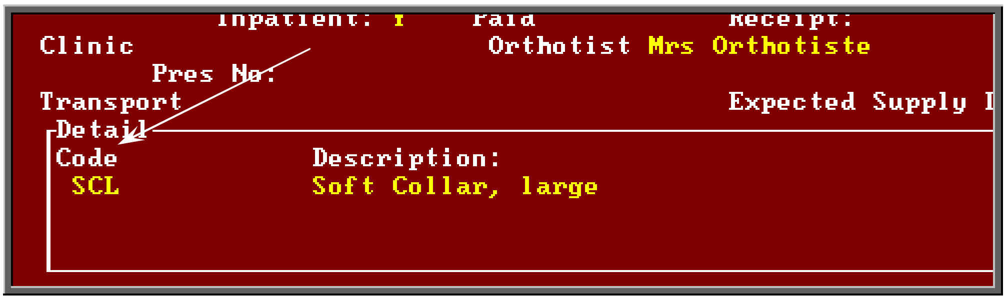
When an item that you hold in stock is issued to patient you still need to add an order from the patient screen (as you would if you were having to order the item from a supplier - see Orders – Note 2. Adding an order).

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.



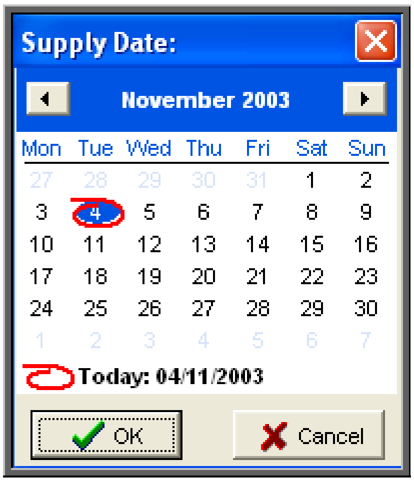
- when you reach the *Code* field in the Details box you need to select the Stock No for the item (as set up in the Stock Items screen – see Stock Control - Note 2. Stock items) and not the OPrice/NSI schedule code for that item.



- 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.

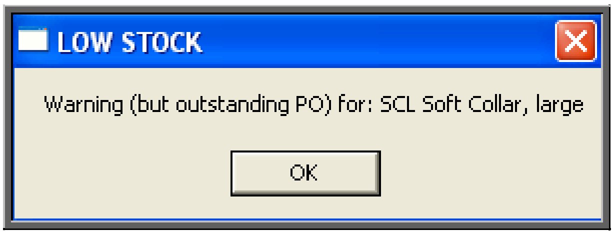
If you select Yes, you will then be asked to select the date the goods were supplied. Today's date will be highlighted but this can be changed if necessary. (Press Cancel here if you wish to abandon updating stock control.)



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  (Edit, Enter).

Date	shows as today but can be changed if required.
Order No	the next order number in sequence shows, but can be changed if required.
Supplier	is selected from the list of suppliers.
Invoice	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 for the Supplier (Utilities – Choices – Finance – Accounts), 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 is valid for the supplier selected, then the *Description*, *Orthosis Code*, *(V)at 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.

Notes: additional information can be entered

Press **Ctrl-Enter** to finish.

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.

7. Printing purchase orders

The purchase order can be printed instantly as the order is raised, or manually.

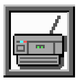
a) Instant printing

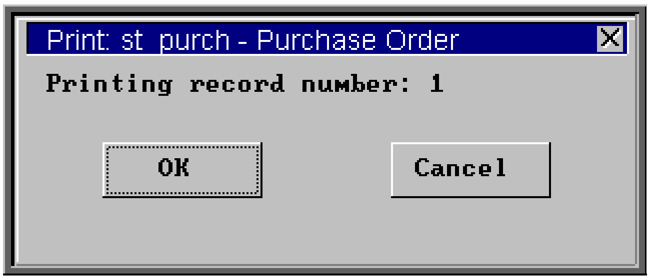
If you want each individual order to print automatically when you have finished inputting it, go into Utilities – Choices – System and enter the number of copies required in the *Stock Orders* field.

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

Press the **Enter** key.

b) Printing manually

To print the order, click on the 'print' icon  (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.

This option is also used for reprinting purchase orders.

8. Faxing purchaser orders

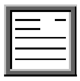
Individual suppliers can be set up to have their orders faxed directly to them.

Note: This uses the same functionality that is used for faxing patient orders, so you do not need to change any settings if faxing is already switched on.

To be able to fax orders direct to the supplier, your computer must have a fax driver and this needs to be entered in the *Fax printer* field in the system parameters screen (Utilities – Choices – System)

Menu: Utilities – Choices – History – Fax

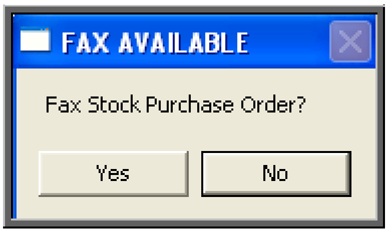
If you wish to fax orders to all suppliers then leave this screen blank. Otherwise, specify those suppliers you wish to fax to by adding them in this screen.

To specify particular suppliers for faxing, click on the 'enter' icon  (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.

Once a supplier has been identified as a fax supplier, whenever an order for that company is entered onto OPAS, you will be asked after completing the order if you would like to fax it straight away.



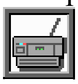
If No is selected, you will still have the opportunity to fax the order later individually.

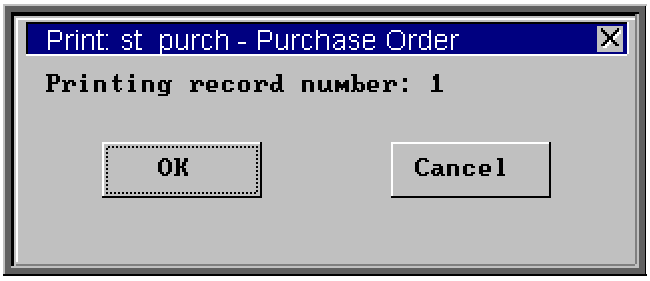
Select Yes to fax the order.

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.

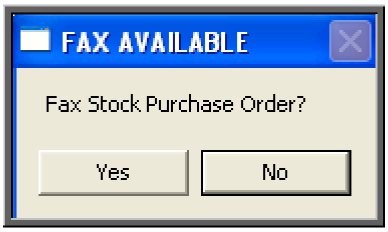
The supplier number should remain at the bottom of the Order screen until the fax is sent. We are aware though that some fax software clears the fax number from the Order screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should happen.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

Re-faxing orders

The purchase order can be re-faxed at anytime by clicking on the 'print' icon  (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.



Select Yes to fax 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.

9. Emailing purchase orders

Individual suppliers can be set up to have their orders emailed directly to them.

Note: This uses the same functionality that is used for emailing patient orders, so you do not need to change any settings if emailing is already switched on (see Orders – Note 11. Emailing Orders).

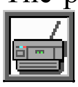
Once a supplier has been identified as an email supplier, whenever an order for that company is entered onto OPAS, you will be asked after completing the order if you would like to fax it straight away.

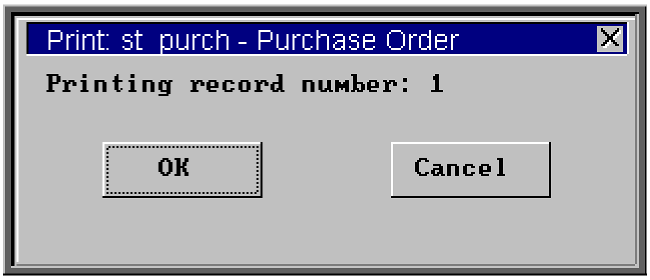
If you do not wish to e-mail the order, click on No.

If you do not e-mail the order now, you can always do it later.

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.

Re-emailing orders

The purchase order can be re-emailed at anytime by clicking on the 'print' icon  (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.

Select Yes to email the order.

Note: Orders can only be e-mailed to suppliers that have been set up in Utilities – Choices – History – E-mails.

10. Amending a stock purchase order

Menu: Stock Control – 1st System – Purchases

Find the relevant purchase order and then click on the 'update' icon  (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**.

11. Cancelling a stock purchase order

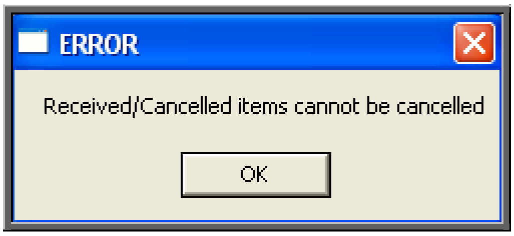
Menu: Stock Control – 1st System – Purchases

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 (F6 and F5).

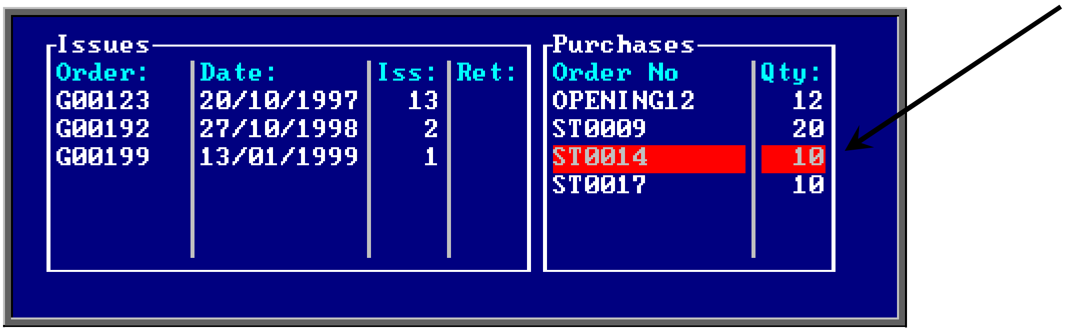
Once you are looking at the line that you wish to cancel, click on the 'delete' icon (Cancel).

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 (File, Return) the lines that you have cancelled will be highlighted in red.

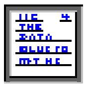
Also, when you next go into Stock Control – 1st System – Items the order number will be highlighted in red so that you can see from that screen too that the line has been cancelled.



12. Purchase order numbers

Each stock system can have its own prefix for its purchase order numbers.

Menu: Utilities – Choices – Default

Find default Numbers 66- 70 and click on the 'update' icon  (Edit, Update).
At the bottom of the screen you will be asked to type in the New Default.

Type in the formula below where "??" is the prefix required, and press **Enter**.

```
="??"¦right(str(100000) + [count]),4)
```

This should be set for you during your Stock Control training. Contact the OPAS helpdesk if you need help.

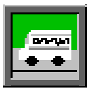
13. Booking goods in

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 'good in' icon  (Receive).

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.

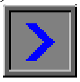
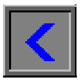
Once items have been marked as received

- 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 that one line on the order, move forwards and backwards through the Items screens using the 'arrow' icons  and  (F6 and F5).

Once you are looking at the line that you wish to book in click on the 'goods in' icon  (Receive).

If the line has already been booked in the following message will appear.

Once the line has been received

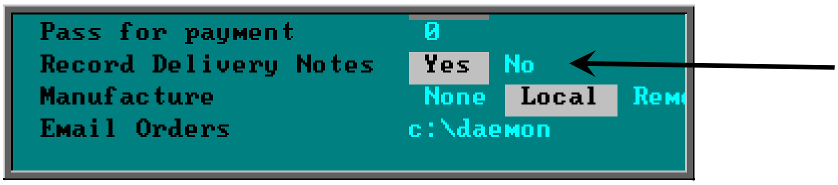
- the *Status* field on the Items screen will show as Received
- the *Received* field will show today's date
- the *By* field will show who booked the goods in

and when you return to the main purchase order screen (by pressing Esc, clicking on the 'exit' icon  (File, Return)

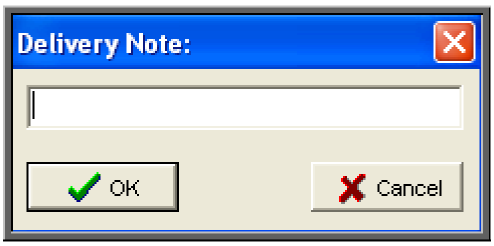
- the date the lines were received will be entered in the *Received* field (to the right of the *Total* field) N.B. This may not be visible to some of you without moving to the right of your screen with the right arrow key on your keyboard.
- the lines that you have booked in will no longer be highlighted in green.

c) Recording delivery notes

If the *Record Delivery Notes* field is switched on in the system parameters (Utilities – Choices – System), then delivery notes can be recorded on Stock orders as well as on Patient orders.

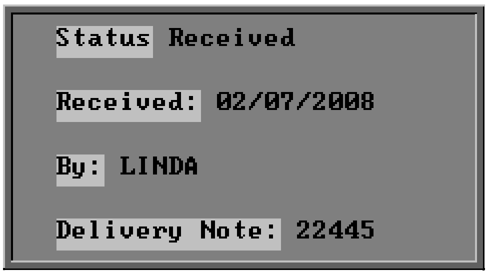


If the *Record Delivery Notes* field is set to Yes, the following prompt will appear.



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 item screen, which can be accessed by clicking on the word *Item* above the icons on the Purchase Order screen.)



14. 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  (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.

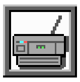
15. Passing stock invoices for payment

Menu: Stock Control – 1st System – Purchases

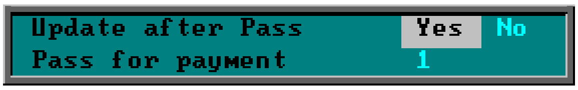
Once the Purchases screen has been updated with invoice details the next step is to pass the invoices for payment. There are two purposes for doing this:

1. To produce a report listing those invoices that are being passed for payment.

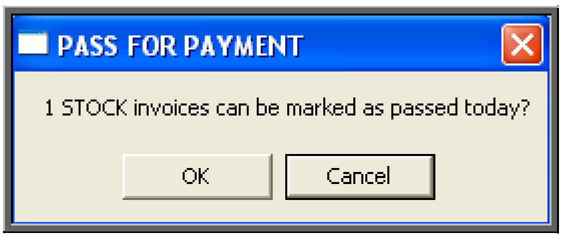
2. To mark the invoices with today's date so that you know when the invoice was passed on to you Finance Department for payment.

Click on the 'print' icon  (File, Print) and select Pass for payment.

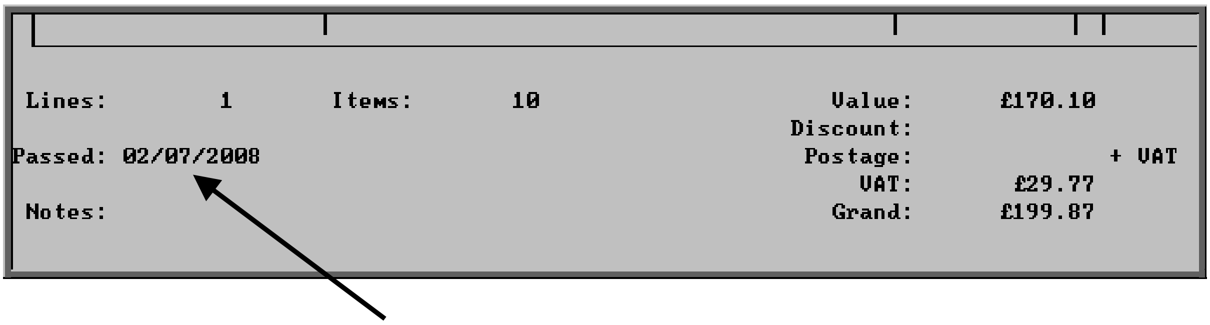
The system will then find those invoices that can be passed to the accounts department for payment (i.e. those invoices that have an invoice date entered and that have not been passed already) and prints a list of those invoices. As with all reports, the layout of this list can be modified if required. Within the system parameters (Utilities – Choices – System) you can set the number of copies of this report needs to be printed. If you do not wish to print this report when running pass for payment, enter a 0 in this option. (Note: this parameter also controls the number of copies of the pass for payment report for non-stock invoices)



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.



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

16. 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  (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**.

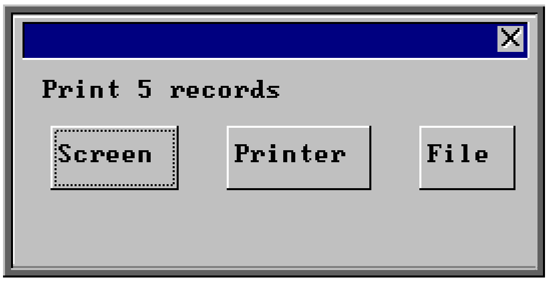
Alternatively, press **Ctrl-Enter** to save and exit the screen at any point after the *Date:* field.

17. 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.



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.

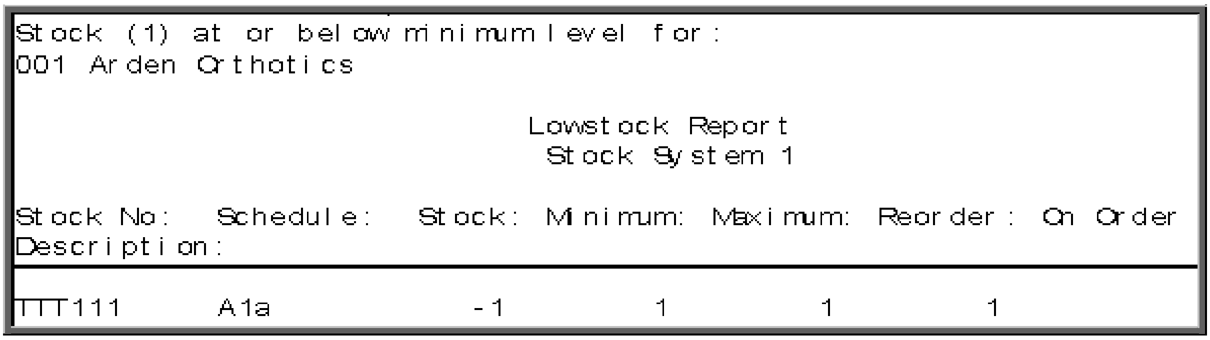
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Low Stock report.



Stock (1) at or below minimum level for :
001 Arden Orthotics

Lowstock Report
Stock System 1

Stock No:	Schedule:	Stock:	Minimum:	Maximum:	Reorder :	On Order
Description:						
TTT111	A1a	-1	1	1	1	

The report layout (lowstock.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

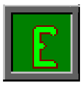
A comma separated variable file will be created called lowstock.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

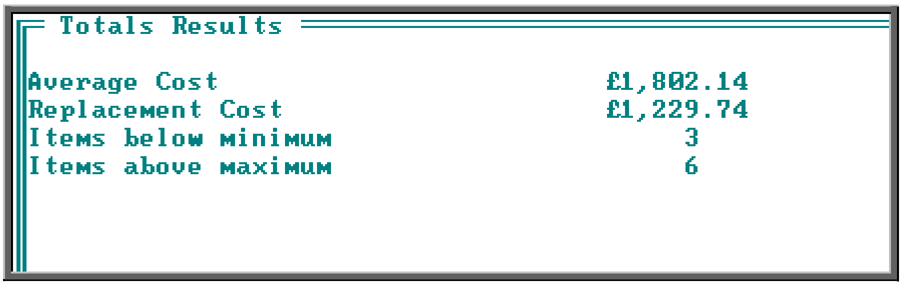
This report can also be run from Reports – Stock – Low Stock

18. 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  (Totals), and the information will be displayed on the screen.



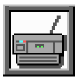
This can be printed by pressing **Alt-P**.

19. 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  (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.

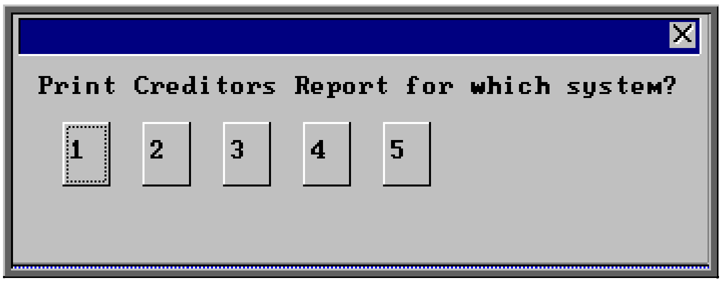
Stock No:	Description:	Qty:	Cost:	Replace:
SCL	Soft Collar, large	38	œ205.58	œ77.90
SCM	SOFT COLLAR MEDIUM	44	œ111.32	œ90.20
SCXL	SOFT COLLAR EXTRA LARGE	26	œ69.42	œ53.30
MECM	MEDIUM SOFT COLLAR	32	œ91.84	œ65.60
A000001	ERI UYERYERUGH	3	œ875.34	œ886.14
ESK03	SK KNEE BRACE SMALL	3	œ69.00	œ0.00
ESK05	SK KNEE BRACE MED	0	œ0.00	œ0.00
APOSL	Post Op Slipper Large	2	œ6.00	œ0.00
APOSM	Post Op Slipper Medium	12	œ36.00	œ0.00
LINDA	SPECIAL COLLAR	24	œ48.24	œ49.20
OGB10M	ANALOG H/A	6	œ282.00	œ0.00
SCS	Surgical Collar Small	4	œ7.40	œ7.40
SCEXL		16	œ0.00	œ0.00
	Grand Total		œ1,802.14	œ1,229.74

20. Batch Reports

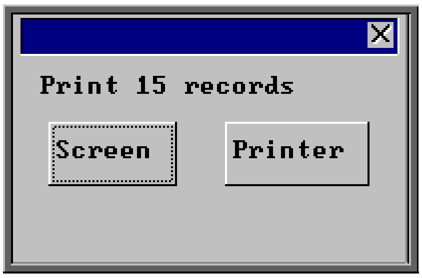
As well as the reports that can be run from various stock screens, the following reports are available from the Reports menu.

a) Creditors

Menu: Reports – Stock – Creditors



Select which stock system the report is to be run for.



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, 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.

Below is an example of the Creditors report.

Stock Purchases System 1
Orders Received but not invoiced
Printed 02/07/2008

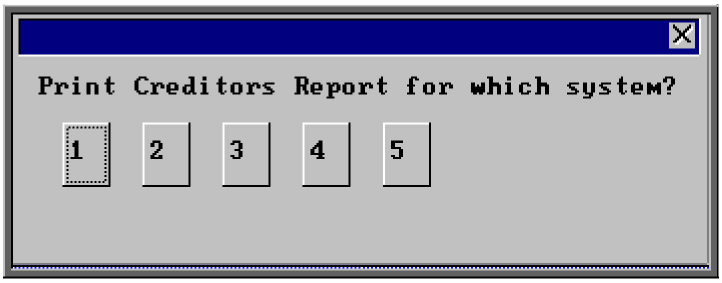
Ordered	Received	Order No	Supplier	Net :	VAT:	Grand:
19/05/1998	25/08/2000	ST0011	012	28.70	5.02	33.72
06/08/1998	25/08/2000	ST0012	012	57.40	10.05	67.45
26/10/1999	25/08/2000	ST0013	012	20.00	3.50	23.50
25/08/2000	25/08/2000	ST0014	012	41.00	7.18	48.18
25/08/2000	25/08/2000	ST0015	012	20.50	3.59	24.09
25/08/2000	25/08/2000	ST0016	012	20.50	3.59	24.09
25/08/2000	11/10/2000	ST0017	012	61.50	10.76	72.26
10/10/2000	10/10/2000	ST0019	012	790.48	138.33	928.81
06/07/2004	Part only	ST0021	012	823.20	144.06	967.26
13/01/2008	13/01/2008	ST0024	001	12.34	2.16	14.50
13/01/2008	13/01/2008	ST0025	001	12.34	2.16	14.50
13/01/2008	13/01/2008	ST0026	001	12.34	2.16	14.50
13/01/2008	20/04/2008	ST0027	001	61.70	10.80	72.50
06/02/2008	Part only	ST00191	012	340.20	59.54	399.74
19/04/2008	02/07/2008	ST0028	012	170.10	29.77	199.87
			Grand Total	2,472.30	432.66	2,904.96

The report layout (stcredit.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

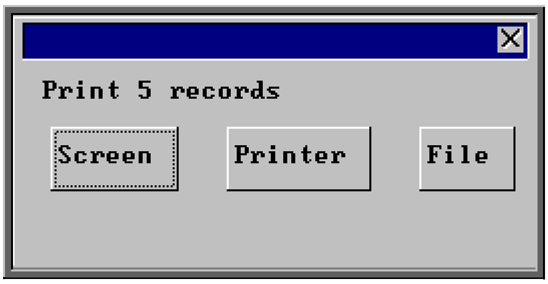
b) Low Stock

Menu: Reports – Stock – Low Stock

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.



Select which stock system the report is to be run for.



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 **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.

Below is an example of the Low Stock report.

Stock (1) at or below minimum level for :
001 Arden Orthotics

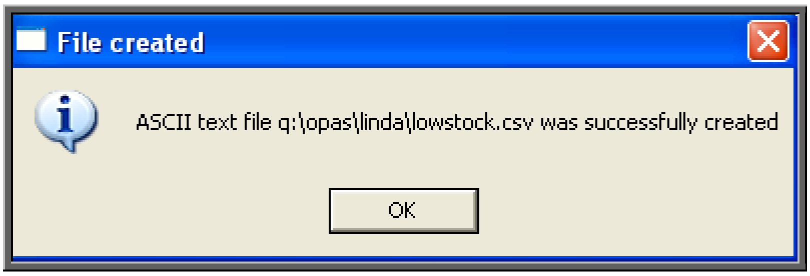
Lowstock Report
Stock System 1

Stock No:	Schedule:	Stock:	Minimum:	Maximum:	Reorder:	On Order
Description:						
TTT111	A1a	-1	1	1	1	

The report layout (lowstock.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

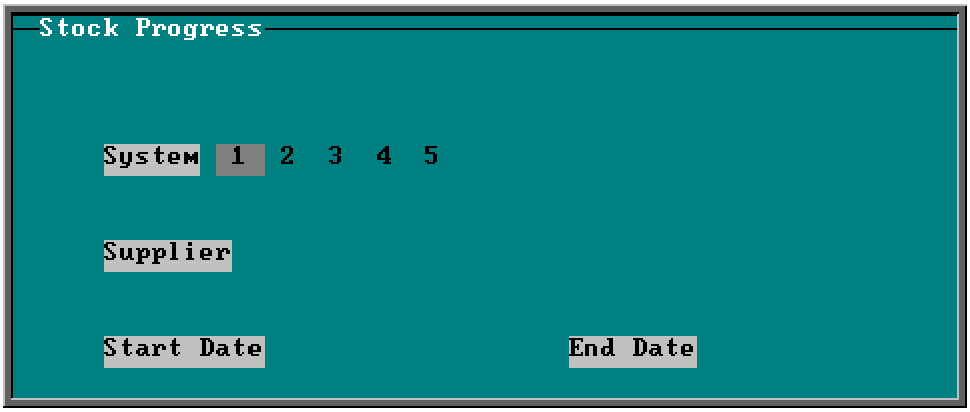
A comma separated variable file will be created called lowstock.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



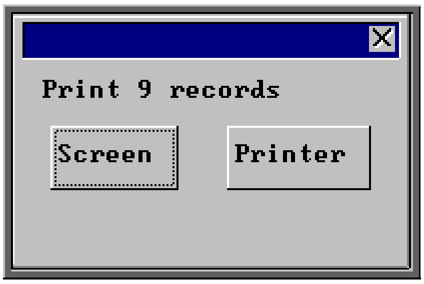
c) Progress

Menu: Reports – Stock – Progress

This report interrogates your Stock Purchase Orders and finds those that have not yet been received.

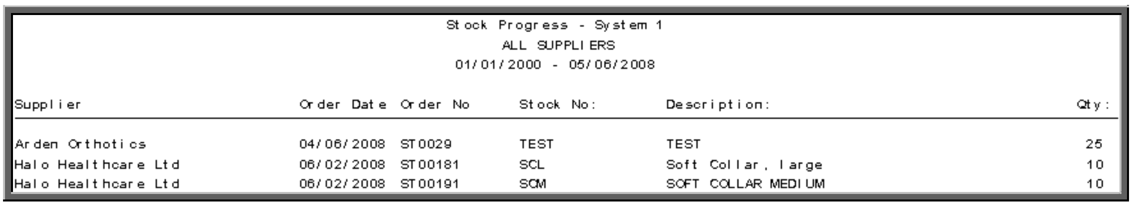


- select the Stock System required
- select the Supplier required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected
- enter the Start date of the required date range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



Once the data has been found you have the option to see the report on screen or to be printed

Below is an example of the Progress report.



Stock Progress - System 1
ALL SUPPLIERS
01/01/2000 - 05/06/2008

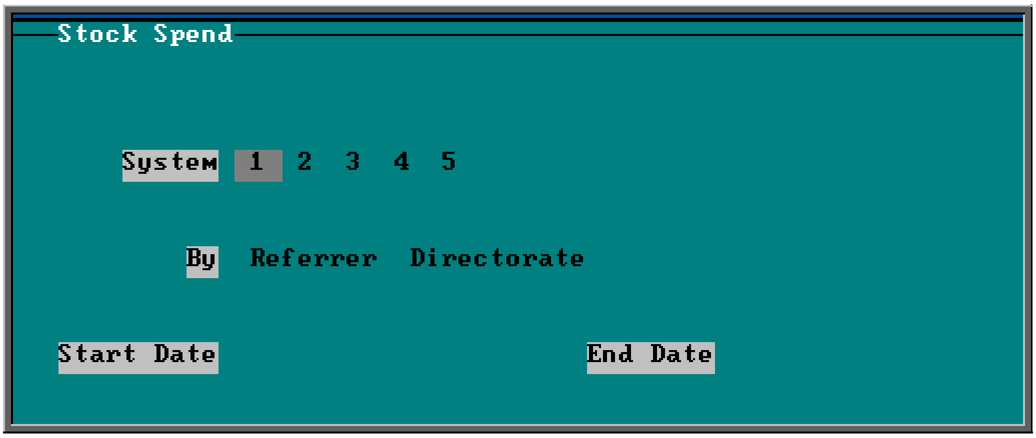
Supplier	Order Date	Order No	Stock No:	Description:	Qty:
Arden Orthotics	04/06/2008	ST0029	TEST	TEST	25
Halo Healthcare Ltd	06/02/2008	ST00181	SCL	Soft Collar, large	10
Halo Healthcare Ltd	06/02/2008	ST00191	SCM	SOFT COLLAR MEDIUM	10

The report layout (st_prog.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

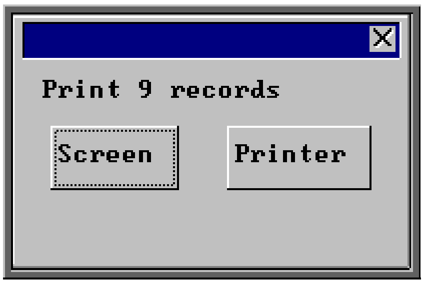
d) Spend

Menu: Reports – Stock – Spend

This report lists items that have been supplied.



- select the Stock System required
- select whether the report should be analysed by Referrer or Direcorate
- 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

Below is an example of the Spend report selecting Referrer.

Stock Spend Report - Stock System 1
02/01/2008 - 31/01/2008
By Referrer

Referrer	Date:	Patient	Stock No:	Price
	13/01/2008	BFTRDSX1457	TEST	12.34
	13/01/2008	NG0325118	TEST	12.34
			Total	24.68
Mr Surgeon	10/01/2008	NX232323	TEST	12.34
	13/01/2008	NG0325228	TEST	12.34
			Total	24.68
Direct Access GP	10/01/2008		STM25X16A	12.34
	10/01/2008		TEST	12.34
	13/01/2008	NS7654321	TEST	12.34
			Total	37.02
			Grand Total	86.38

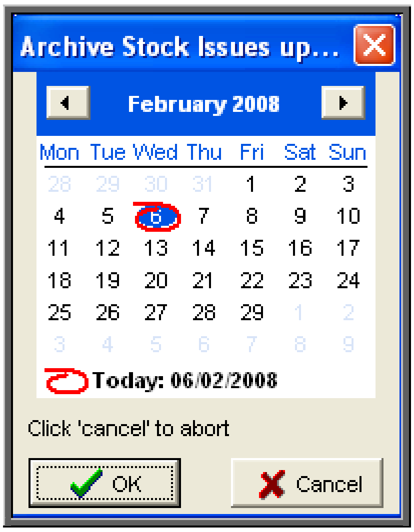
The report layouts (st_sp_co.dfr and st_tr_di.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

21. Archiving

Once you have been using stock control for several years, you may notice that going into the stock Items screen becomes increasingly slow. This is due to all the transactions that are held on the Items screen in the Issues and Purchases tables. For this reason, we have an archive facility in the stock control system which should be run on a regular basis (like the appointment archive).

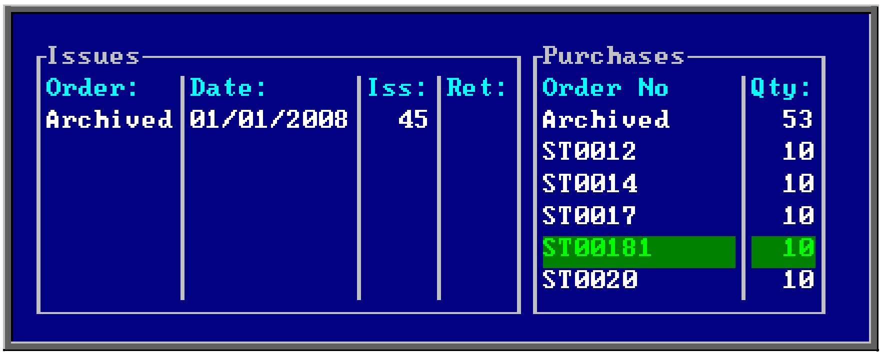
Menu: Stock Control – Archive.

A calendar prompt will appear. Select the date transactions should be archived up until.



Having selected the date, all manual and issue transactions before that date will be archived, **and** any purchase orders that have a *Passed* date (so only purchase orders that have been passed for payment) prior to that date.

The Issues and Purchases tables on the Items screen will be updated with a brought forward archive balance to represent those transactions that have been archived.



Archived transactions can still be viewed using Stock Control – 1st System – Archived – Purchases and Stock Control – 1st System – Archived – Transactions.

Appendix 7a – Stock Items **EXAMPLE**

Description	Schedule Number	Supplier	Price	Stock Number	Opening Stock
Soft Collar – Small	M007	012	39.20	STCOL-S	5
Soft Collar – Medium	M007	012	39.20	STCOL-M	7
Soft Collar - Large	M007	012	39.20	STCOL-L	2

Appendix 7b – Stock Items

Description	Schedule Number	Supplier	Price	Stock Number	Opening Stock

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

36. Financial report – Orders

37. Financial report – Payments

38. Financial report – Profit

39. Financial report – Progress

40. Financial report – Purchases

41. Financial report – Quarterly

42. Financial report – Received

43. Financial report – Reclaim VAT

44. Financial report – Referrers

45. Financial report – Returns

46. Financial report – Schedules

47. Financial report – Statements

48. Financial report – Supplier Spend

49. Financial report – Wards

50. Financial report – Workshop

51. Financial report – YTD (Year to Date)

52. Patients Reports (Batches)

53. Patients report – Amputee

54. Patients report – Conditions

55. Patients report – Ethnicity

56. Patients report – Registered

57. Patients report – Reviews

58. Patients report – Services

59. Prescriptions Reports (Batches)

60. Prescriptions report – Charges

61. Prescriptions report – Expired

62. Prescriptions report – New

63. Stock Control (Batches)

64. Stock Control – Creditors

65. Stock Control – Lowstock

66. Stock Control – Progress

67. Stock Control – Spend

68. Waiting List (Batches)

69. Waiting List – Archived

70. Waiting List – Current

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, care episodes, stock 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, Care Episode reports, Financial reports, Patients reports, Prescriptions reports, Stock reports and Waiting List 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.

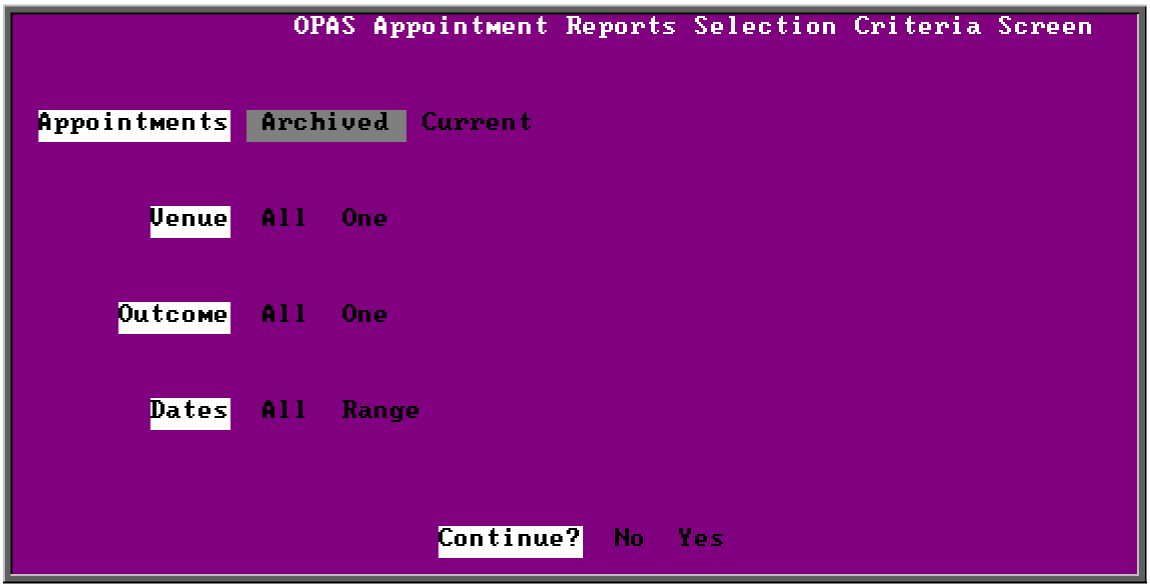
Finally, and I cannot stress this enough, the format of the printed report can be tailored to suit your requirements. Just like your order and letters layouts were customised when you first started using OPAS, so can your reports. So, if you print a report and it shows the patient's hospital number and 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.



Appointments

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

Venue

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

Outcome

Select All	if all Outcomes are to be included

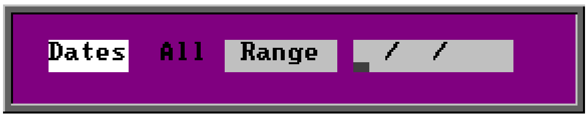
Select **One** — if only one Outcome is to be included on the report. Use the space bar on your keyboard to move the highlight from **All** to **One** and press **Enter**. A pop-up list will appear for you to make your selection from. Your selection will appear on the screen.

Dates

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

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

Type the start date in the space provided in the format DD MM YYYY and press **Enter**.



Now type in the end date in the next space in the format DD MM YYYY and press **Enter**.

Continue

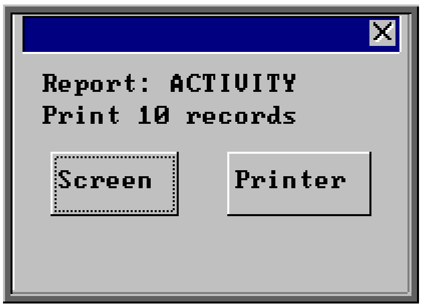
Select **No** — if you wish to abandon the **Ad hoc** report screen

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 can show for each venue what type of appointment were seen and the outcomes for those appointments



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, 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.

Below is an example of the **Activity** report.

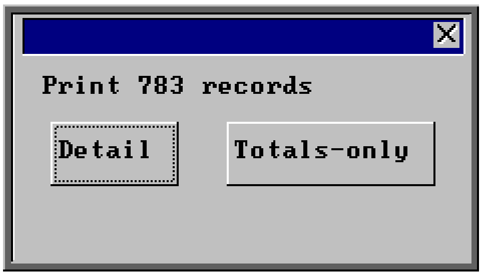
Appointment Activity Report

	Total	New	Supply	Fit	Review	Cast	Other	Attended	DNA
Orthotic Clinic	789	57	7	85	7	4	629	461	30
New Clinic	36	4			2		30	27	4
Test	7						7	6	1
A N Other Clinic	5				1		4	1	1
Diabetic Foot Clinic	3						3	1	1

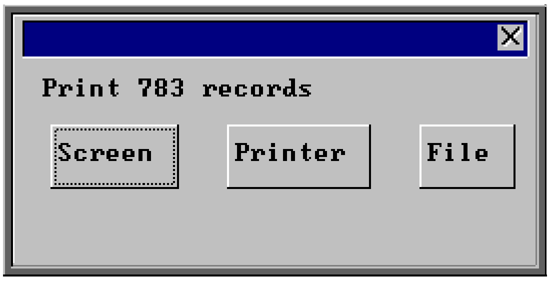
The report layout (activity.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

List

The List report will show all the appointments that matched the criteria and include arrived and seen times. This report will only work if archived appointments are being analysed.



You will be shown how many appointments OPAS has found and ask if you want to see the information in Detail i.e. a line for each order or just Totals-only



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

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Printer

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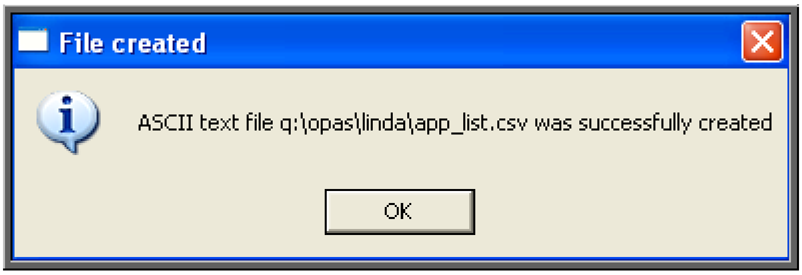
Below is an example of the List report in Detail.

Clinicv	Patient	Date:	Time	Arrived:	Seen:
Orthotic Clinic	NG1010589	01/05/2003	09:15:00		
Orthotic Clinic	NG0324777	13/05/2002	09:15:00		
Orthotic Clinic	NTCRUS007	29/02/2000	09:15:00	09:15:00	10:05:00
Orthotic Clinic	NTCRUS009	14/02/2008	09:15:00		
Orthotic Clinic	NLKP12345	04/11/1999	09:15:00	09:00:00	10:25:00
Orthotic Clinic	NAB123456	25/03/2008	09:15:00		
Orthotic Clinic	NG3350674	26/02/2001	09:15:00	09:10:00	09:20:00

The report layout (app_list.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



3. Appointments Reports (Batches)

Menu: Reports – Appointments – Batches or

Menu: Appointments – Print – Reports – Batches

All the batch appointment reports (except the No Outcome and Transport report) work on archived information, so ensure the appointments for the period you wish to report on has been archived (see Appointments – Note 21. Archiving sessions).

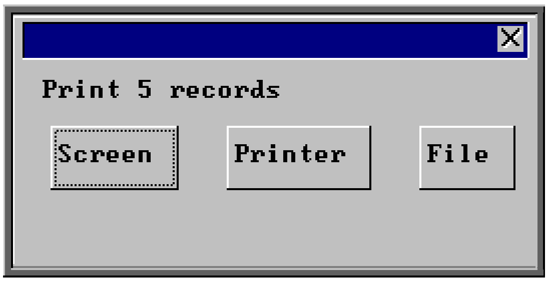
4. Batches – Bookings

This report interrogates the information entered in the booking fields.

Menu: Reports – Appointments – Batches – Bookings or

Menu: Appointments – Print – Reports – Batches – Bookings

- 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



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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.

Below is an example of the Bookings report.

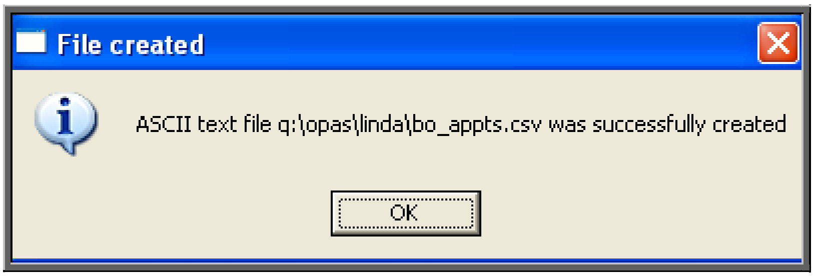
New User NHS Trust
ORTHOTIC DEPARTMENT BOOKING PROGRAMME

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

The report layout (bo_appts.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

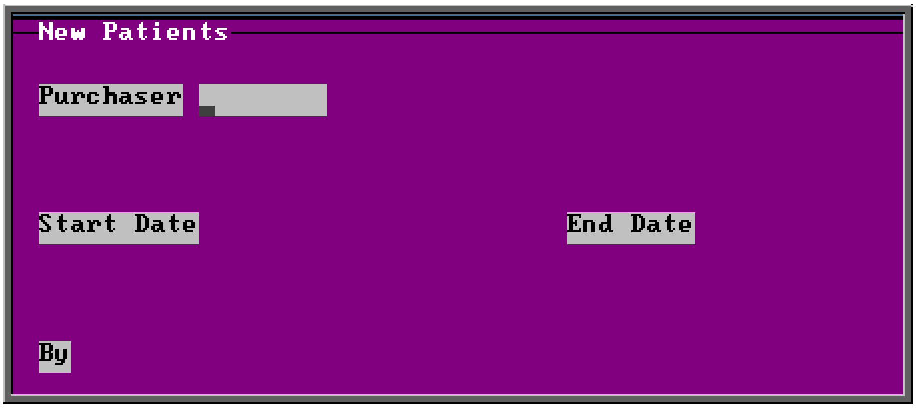


5. Batches – New Patients

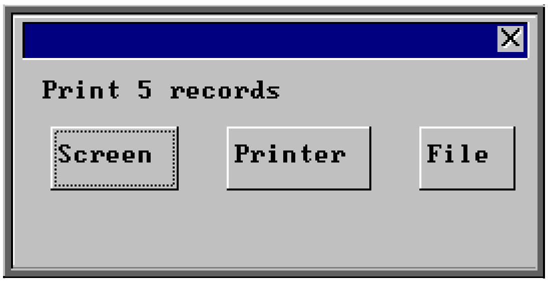
This report interrogates the appointment information for new patients only. OPAS knows which appointments are for new patients by looking at the *New* field on the appointment and selecting those with a Y entered.

Menu: Reports – Appointments – Batches – New Patients or

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



- 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-p box are Clinician, Directorate, Referrer or Venue



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Printer

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Below is an example of the New Patients report selecting Directorate.

New Patient Appointments by Directorate
01/01/2000 - 04/07/2008

Directorate	Total	Attended OP	Attended IP	Attended Other	DNA OP	DNA IP	DNA Other
General	2	1					
PCT	51	25		1	4		
Trauma & Orthopaedic	1	1					

The report layouts (np_apptc/d/r/v.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

np_appc.csv	if clinician is selected
np_appd.csv	if directorate is selected
np_appr.csv	if referrer is selected
np_appv.csv	if venue is selected

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

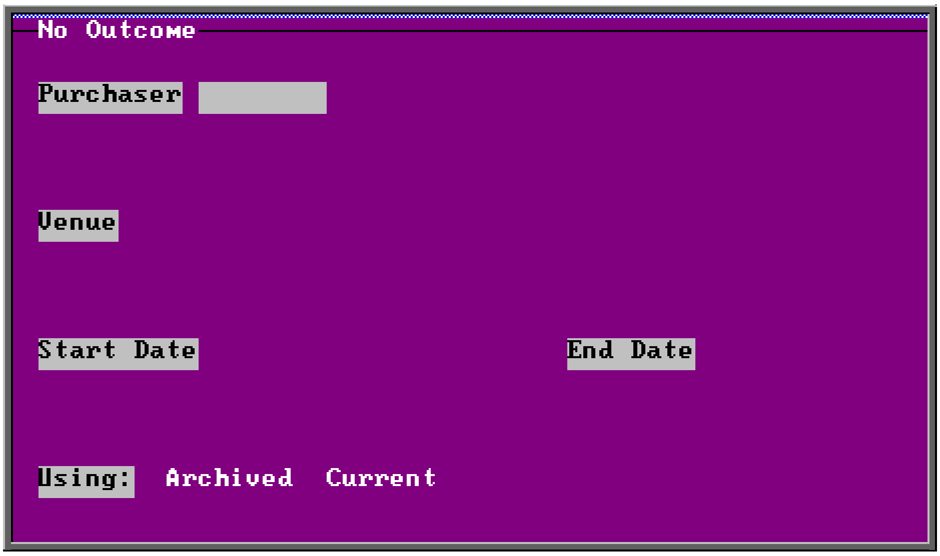
6. Batches – No Outcome

This report will show which appointments have had no outcome recorded.

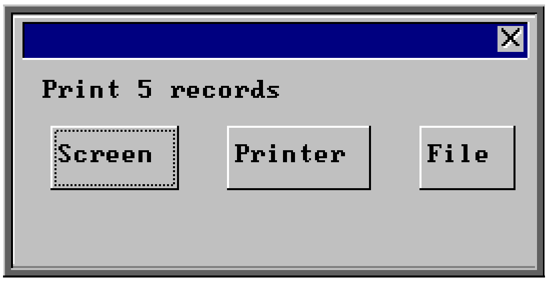
The report can be used for either current or archived appointments.

Menu: Reports – Appointments – Batches – No Outcome or

Menu: Appointments – Print – Reports – Batches – No Outcome



- 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 Venue required 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
- select whether the report period is for Archived or Current appointments



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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.

Below is an example of the No Outcome report.

Appointments without Outcomes

Session	Date	Time:	Patient
2846	29/11/2007	11:20	NG0825852
2846	29/11/2007	11:40	NG8904425
2846	29/11/2007	15:00	NG8404152
2846	29/11/2007	14:30	NG0606286
2846	29/11/2007	14:15	NG0819725
2846	29/11/2007	14:50	NG0606286

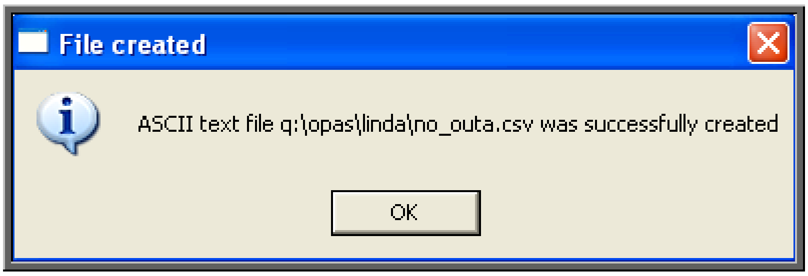
The report layout (no_out.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

no_outa.csv   if run for archived appointments no_outc.csv if run for current appointments

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



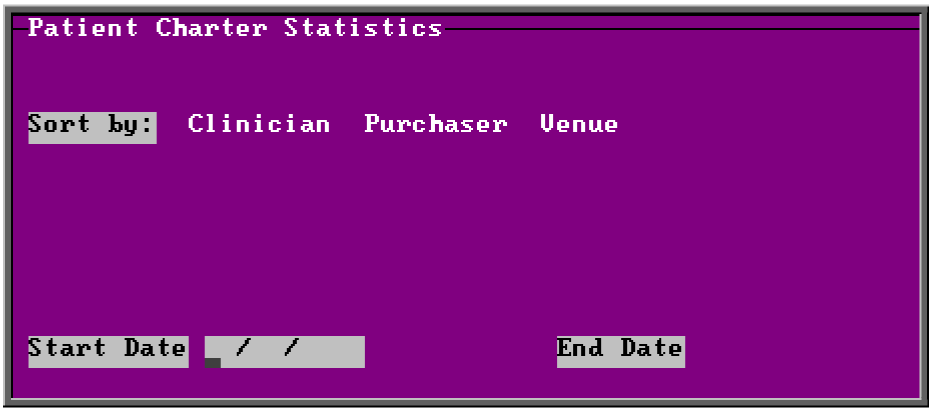
7. Batches – Patient Charter Stats

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 (seen within half an hour of arrival if they arrived after their appointment time).

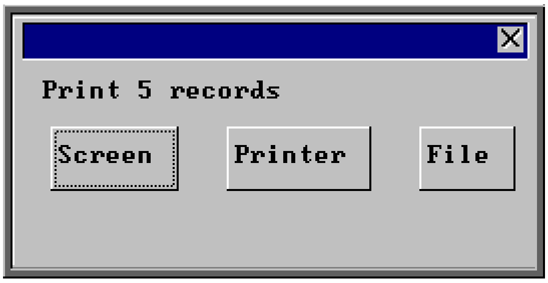
The report will only look at archived appointments, so make sure that the period you wish to report on has been archived.

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

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



- select how you wish the information to be displayed i.e. by Clinician, Purchaser or Venue
- 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

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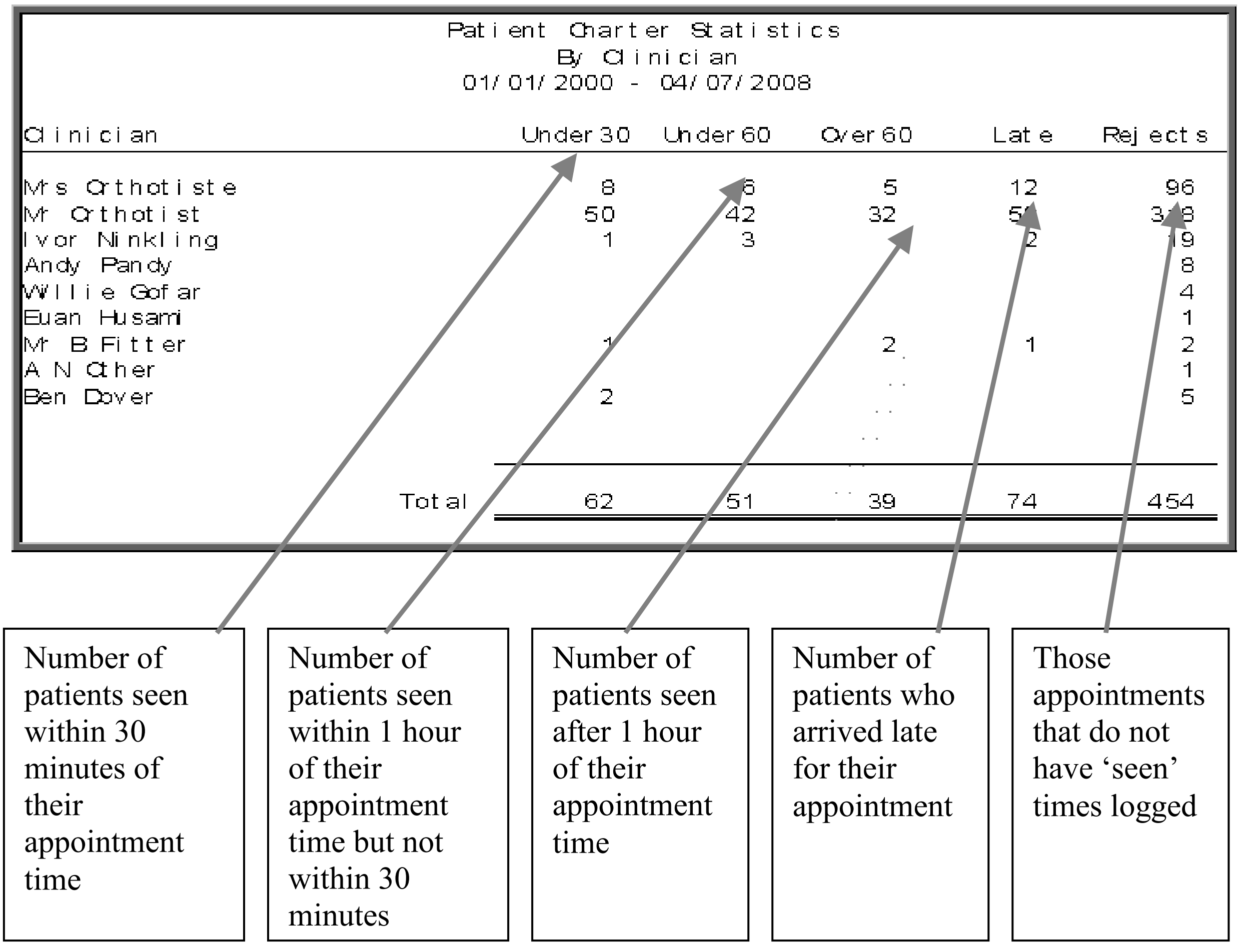
Press Esc to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press Esc again to return to the menu.

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.

Below is an example of the Patient Charter Stats report selecting Clinician.



Patient Charter Statistics
By Clinician
01/01/2000 - 04/07/2008

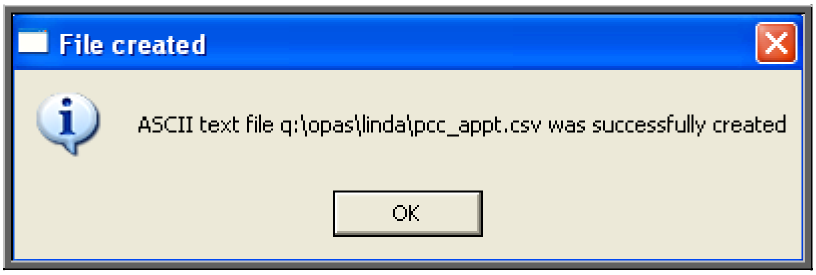
Clinician	Under 30	Under 60	Over 60	Late	Rejects
Mrs Orthotiste	8	6	5	12	96
Mr Orthotist	50	42	32	5[illegible]	3[illegible]8
Ivor Ninkling	1	3		2	19
Andy Pandy					8
Willie Gofar					4
Euan Husami					1
Mr B Fitter	1		2	1	2
A N Other					1
Ben Dover	2				5
Total	62	51	39	74	454

File

A comma separated variable file will be created called

pcc_appt.csv	if clinician is selected
pcp_appt.csv	if purchaser is selected
pcv_appt.csv	if venue is selected

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



8. Batches – PCT

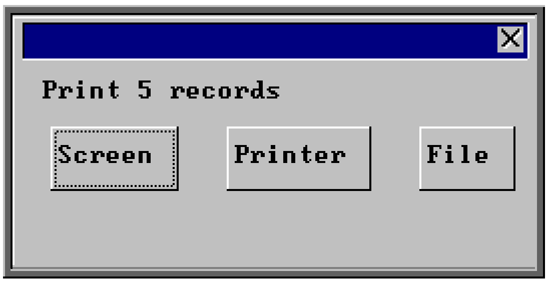
This report will provide a breakdown of PCT activity. An appointment report providing a summary of PCT activity is available in Reports – Appointments – Summaries.

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

Menu: Reports – Appointments – Batches – PCT or

Menu: Appointments – Print – Reports – Batches – PCT

- 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 PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs 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



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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.

Below is an example of the PCT report.

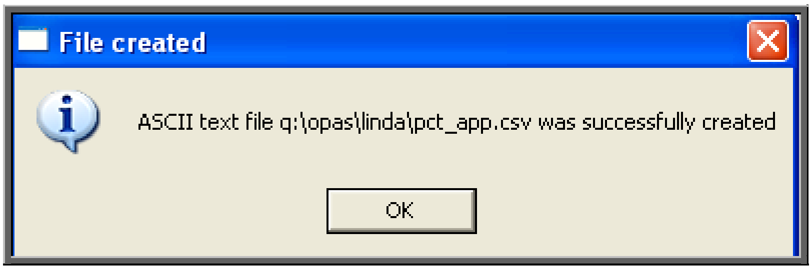
PCT Appointment Activity
01/01/2007 – 30/11/2007

NHS No	Hospital No	Practice	PCT	Appt Date	Type	Consultant	Orthotist	Purchaser
	NTMP000010	J82199	5FE	15/02/2007	F	Mr Surgeon	Mr Orthotist	GP Fundholder
			Count 1					
601-234-5674	TORUS44	L81045	5FL	08/10/2007	N	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	15/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	15/02/2007		Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	19/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	5FL	12/04/2007		Mr Surgeon	Mr Orthotist	NHS TRUST
			Count 5					
623-456-7894	N12345QWERTY	P92017	5HG	20/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
623-456-7894	N12345QWERTY	P92017	5HG	15/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST

The report layout (pct_app.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



9. Batches – Reviews

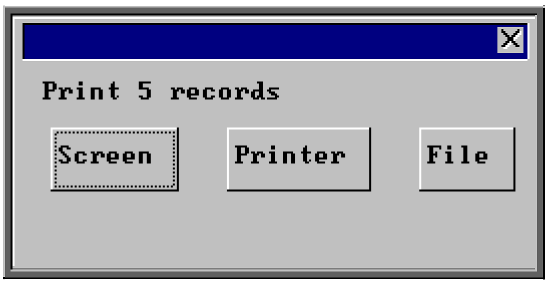
This report interrogates the appointment information for review patients only. OPAS knows which appointments are for review patients by looking at the *New* field on the appointment and selecting those with anything other than Y entered.

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

Menu: Reports – Appointments – Batches – Reviews or

Menu: Appointments – Print – Reports – Batches – Reviews

- 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



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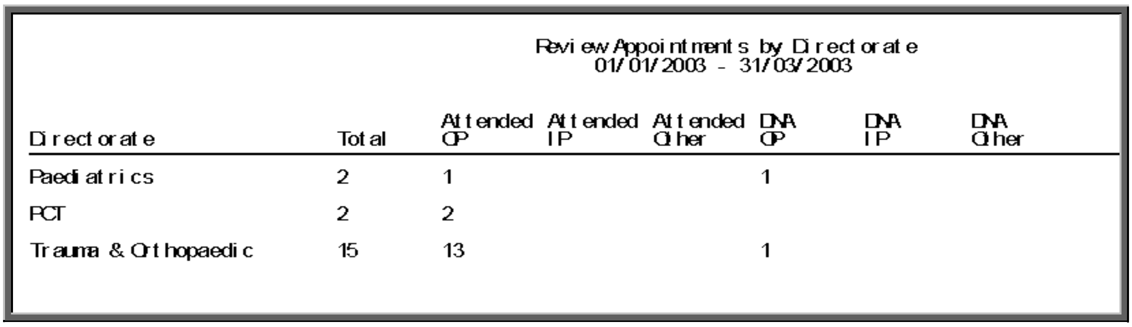
Printer

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.

Below is an example of the Review report selecting 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		

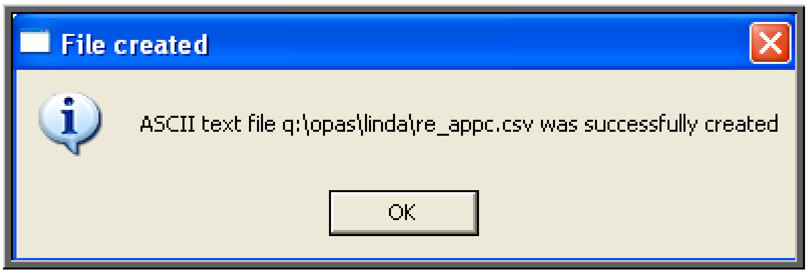
The report layouts (re_apptc/d/r/v.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

re_appc.csv	if run by clinician	re_appr.csv	if run by referrer
re_appd.csv	if run by directorate	re_appv.csv	if run by venue

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



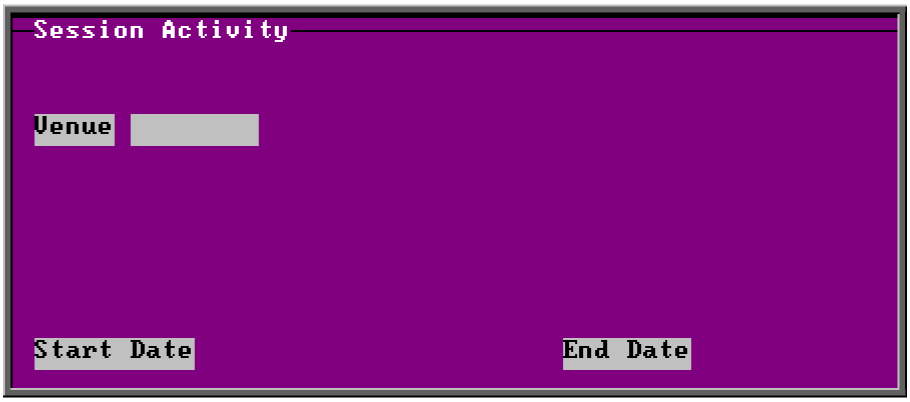
10. Batches – Sessions

This report is will provide a breakdown of session activity (This replaces the session report that used to be within the adhoc menu).

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

Menu: Reports – Appointments – Batches – Sessions or

Menu: Appointments – Print – Reports – Batches – Sessions



- select the Venue required 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

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.

Below is an example of the Session report.

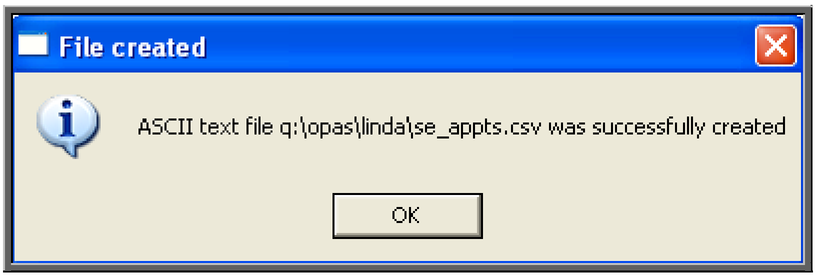
Sessions Report
All Venues
01/01/2007 - 01/12/2007

Venue	Monday	Tuesday	Wednesday	Thursday	Friday	Weekend	All
Appliance Department	56	88	14	43	13		214
MARTINS NOT SO SPECIAL CLINIC		1	1				2
Grand Total	56	89	15	43	13	0	216

The report layout (se_appts.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

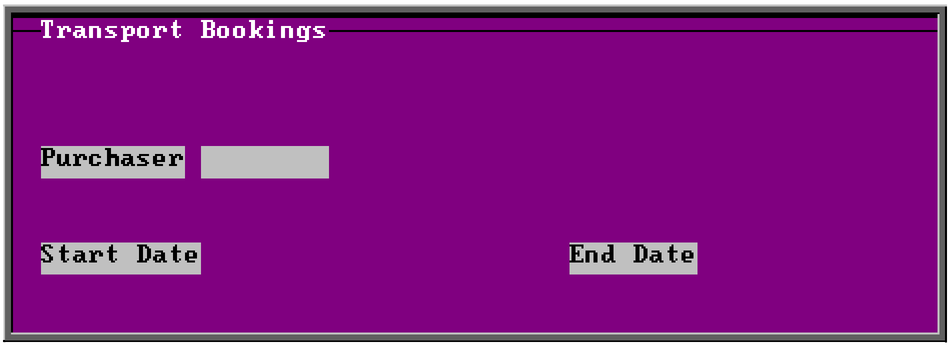


11. Batches – Transport

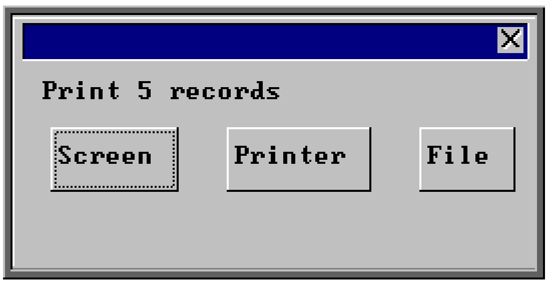
Unlike the other batch appointment reports, this report will only look at current appointments, as the purpose of this report is to see current bookings that have been made.

Menu: Reports – Appointments – Batches – Transport or

Menu: Appointments – Print – Reports – Batches – Transport



- 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

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.

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	TEMP000010	25/09/2003	LINDA

The report layout (tr_appts.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

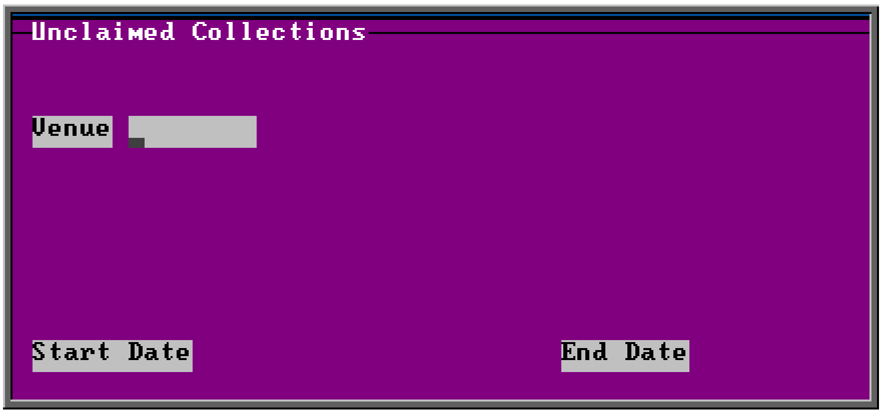
A comma separated variable file will be created called tr_appts.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

12. Batches – Uncollected

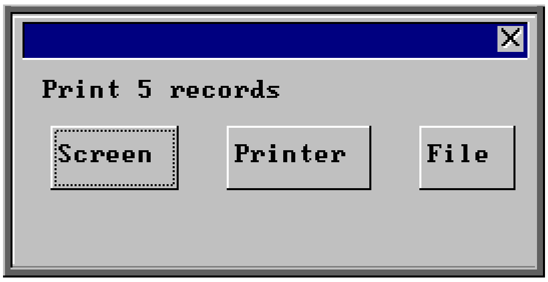
This report has two functions. Firstly it will report on those orders where the goods have not been collected, and then secondly, give you the option to send a reminder collection letter to those patients. OPAS determines which orders have not been collected by looking for orders where the ACO field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

Menu: Reports – Appointments – Batches – Uncollected or

Menu: Appointments – Print – Reports – Batches – Uncollected



- select the Venue 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

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.

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 DAUNCEY	27/04/2003
New Clinic	G3355370	D EYRE	23/04/2003

The report layout (bat_ucol.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

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.

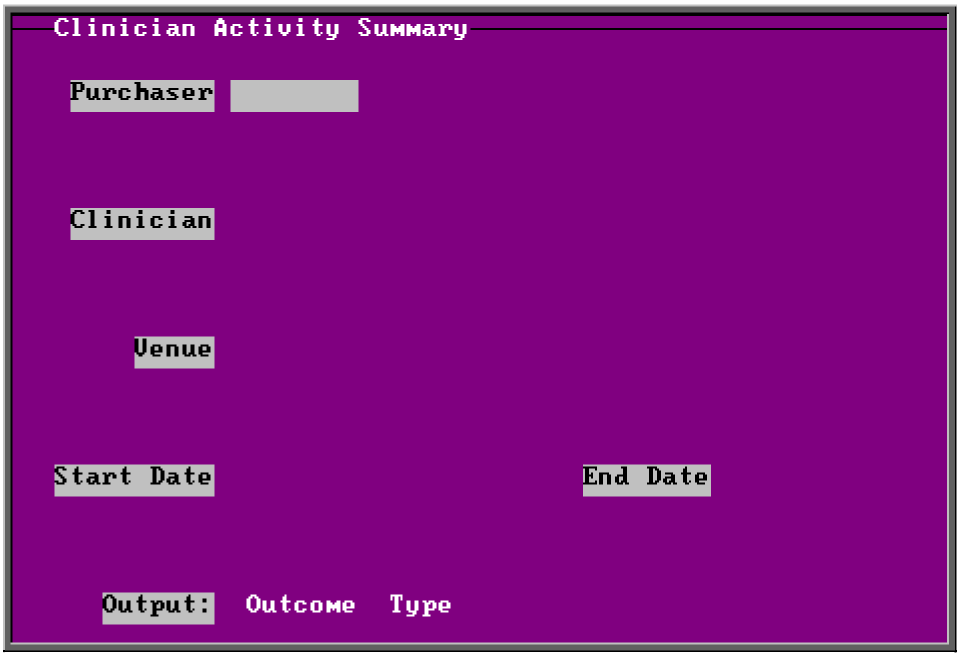
13. Appointments Reports (Summaries)

All these batch summary appointment reports work on archived information, so ensure the appointments for the period you wish to report on has been archived (see Appointments – Note 21. Archiving sessions). The summary reports can be run to analyse appointment type or appointment outcome.

14. Summaries – Clinician

Menu: Reports – Appointments – Summaries – Clinician or

Menu: Appointments – Print – Reports – Summaries – Clinician



- 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

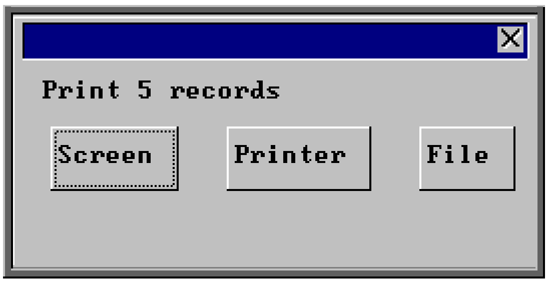
- select a Clinician from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Clinician field empty will result in all clinicians being selected

- 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

- select whether the report should analyse by Outcome or Type



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.

Below is an example of the Clinician report selecting Outcome.

New NHS Trust
Clinician Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

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

Clinician	Total	Time	%age	0	1	2	3	4	5	6	Collect
Ben Dover	8	225	2.2%		8						
Mr B Fitter	5	180	1.8%		5						
Willie Gofar	4	60	0.6%		4						
Euan Husami	1	15	0.1%		1						
Ivor Ninkling	24	355	3.5%	9	14				1		
Mr Orthotist	551	7240	72.3%	136	312	24	42		37		28
Mrs Orthotiste	129	1800	18.0%	45	63	9	2		10		23
A N Other	1	15	0.1%		1						
Andy Pandy	8	120	1.2%		7	1					1
Grand Total	731	10010		190	415	34	44	0	48	0	52

Count 9

Below is an example of the Clinician report selecting Type

Clinician Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Clinician	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
Ben Dover	8	225	2.2%						5	2	1
Mr B Fitter	5	180	1.8%	1					4		
Willie Gofar	4	60	0.6%	1					3		
Euan Husami	1	15	0.1%						1		
Ivor Ninkling	24	355	3.5%	2		4			17	1	
Mr Orthotist	551	7240	72.3%	39	9	72	8	2	412	32	5
Mrs Orthotiste	129	1800	18.0%	19	1	8		2	117	5	
A N Other	1	15	0.1%						1		
Andy Pandy	8	120	1.2%			1			8		
Grand Total	731	10010		62	10	85	8	4	568	40	6

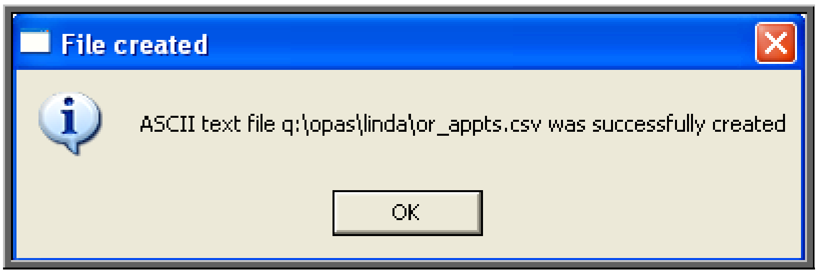
Count 9

File

A comma separated variable file will be created called

or_appts.csv	if analysed by outcome
ot_appts.csv	if analysed by type

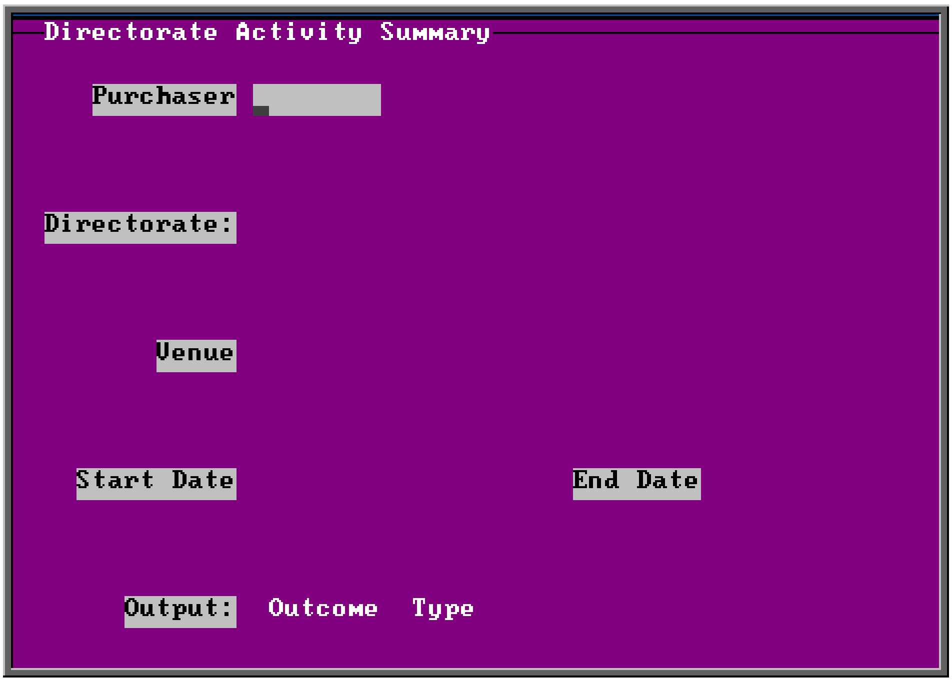
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



15. Summaries – Directorate

Menu: Reports – Appointments – Summaries – Directorate or

Menu: Appointments – Print – Reports – Summaries – 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

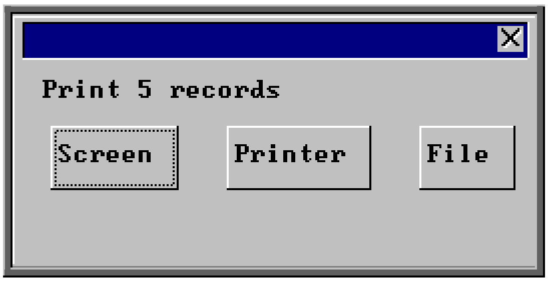
- select a Directorate from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Directorate field empty will result in all directorates being selected

- 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

- select whether the report should analyse by Outcome or Type



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.

Below is an example of the Directorate report selecting Outcome.

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

Below is an example of the Directorate report selecting Type

Directorate Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Directorate	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
	62	655	6.5%	2	2	1	1	1	79		2
General	22	295	2.9%	3	2	7	3		8		
PCT	635	8835	88.3%	56	6	74	3	3	474	40	4
Trauma & Orthopaedic	12	225	2.2%	1		3	1		7		
Grand Total	731	10010		62	10	85	8	4	568	40	6

Count 4

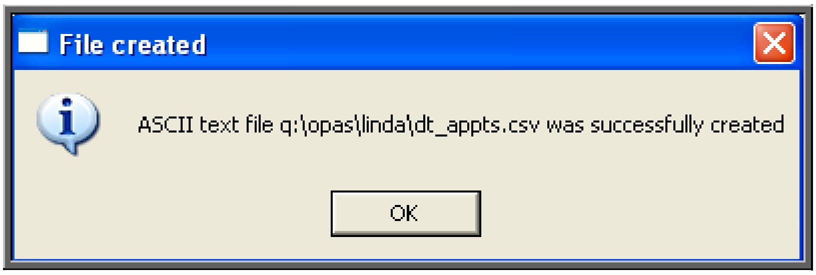
File

A comma separated variable file will be created called

di_appts.csv if analysed by outcome

dt_appts.csv if analysed by type

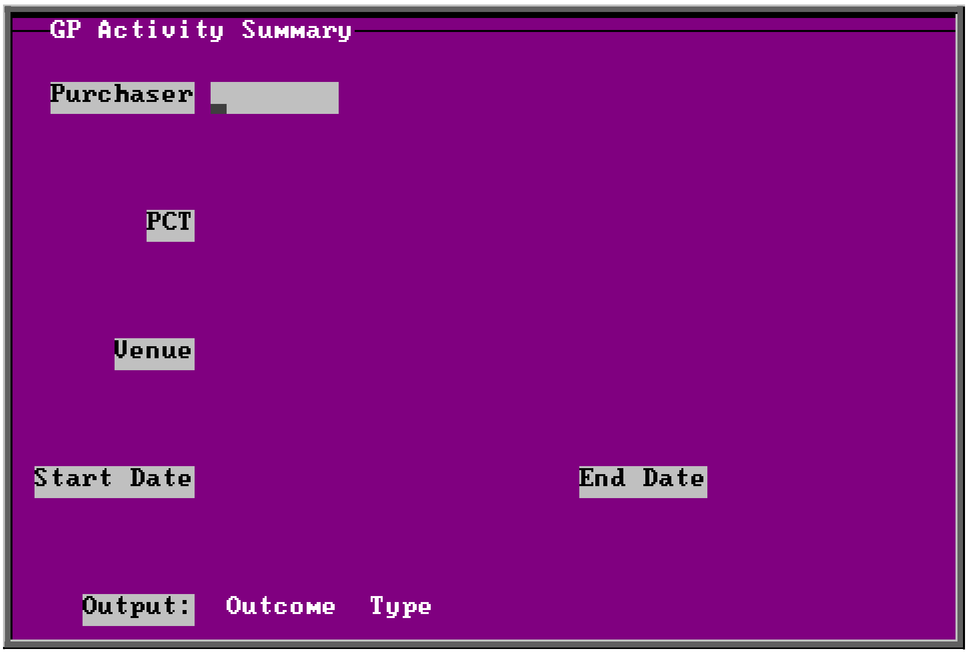
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



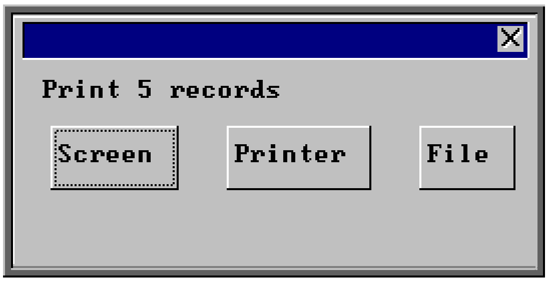
16. Summaries – GP Activity

Menu: Reports – Appointments – Summaries – GP Activity or

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



- 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 PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected
- select the Venue required 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
- select whether the report should analyse by Outcome or Type



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.

Below is an example of the GP Activity report selecting Outcome.

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
		95	1650		92	3					
G0230753	BENNET RB	1	15		1						
G2313537	WOOLAS KD	6	90		6						
G3291821	LIEBERT IJ	24	350		24						2
G3305708	BRACE CA	1	15		1						
G3316902	HUSSAIN S	1	15		1						
G3355370	EYRE DH	1	30		1						3
G3399279	WORTHINGTON JRM	1	15		1						
G3399420	PENRICE GJ	1	15		1						
G3408120	DONALDSON TJ	1	15		1						
G8102216	MAITI SK	3	45		3						
G8203801	JONES IP	4	60		4						
G8409872	SCHUMM 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				

Below is an example of the GP Activity report selecting Type

New NHS Trust
GP Appointment Activity
ALL PURCHASERS
ALL PCTS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

GP Ref		Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
		241	3635	36.3%	22	5	15	3	2	208		6
G0102005	ALLEN EB	1	15	0.1%						4		
G0102926	ANDERSON MG	2	30	0.3%			1			1		
G0107725	ALEXANDER PJ	8	30	0.3%						6	2	
G0110134	ALLEN JP	1	15	0.1%						1		
G0218616	BROOKES M	2	45	0.4%	1		1			4		
G0230753	BENNET RB	2	15	0.1%						2		

File

A comma separated variable file will be created called

gp_appts.csv if analysed by outcome

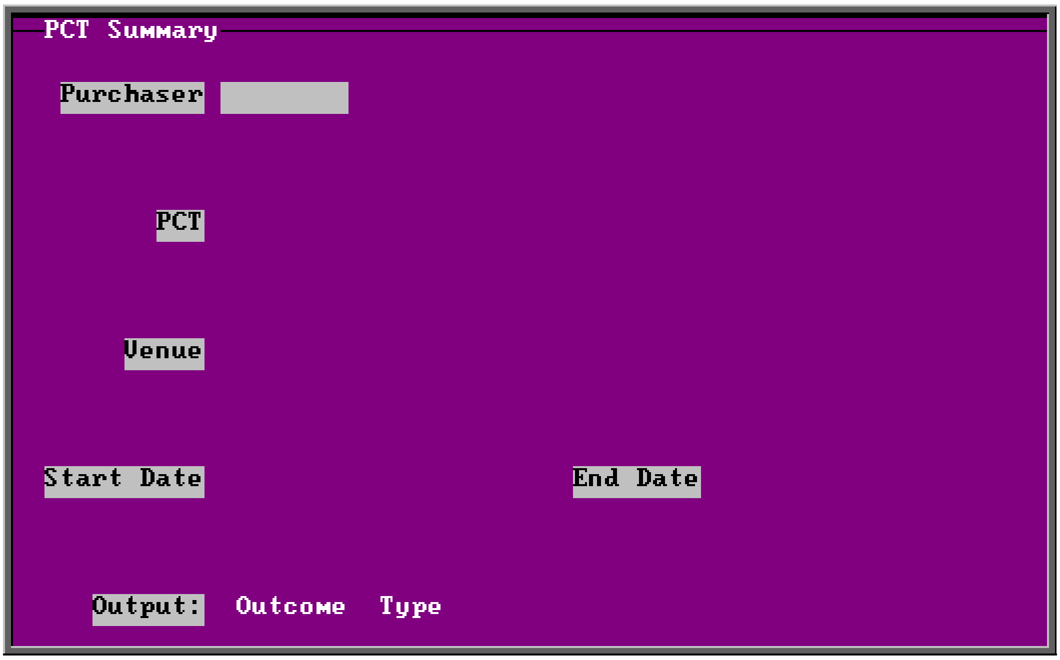
gt_appts.csv if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

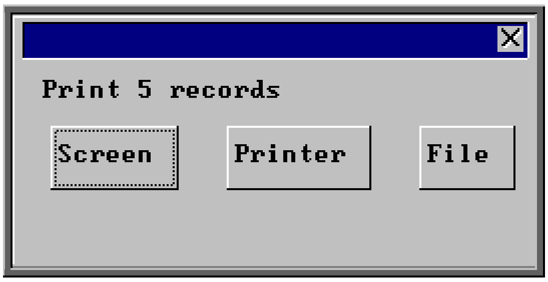
17. Summaries – PCT

Menu: Reports – Appointments – Summaries – PCT or

Menu: Appointments – Print – Reports – Summaries – PCT



- 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 PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected
- select the Venue required 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
- select whether the report should analyse by Outcome or Type



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.

Below is an example of the PCT report selecting Outcome.

New NHS Trust
PCT Appointment Activity
ALL PURCHASERS
ALL PCTS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

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

PCT		Total	Time	%age	0	1	2	3	4	5	6	Collect
		280	4045	40.4%	79	161	12	13		15		23
5A8	GREENWICH TEACHING PCT	2	15	0.1%	2							1
5EM	NOTTINGHAM CITY PCT	1	15	0.1%	1							
5FE	PORTSMOUTH CITY TEACHING PCT	1	15	0.1%	1							1
5FL	BATH AND NORTH EAST SOMERSET PCT	35	650	6.5%	11	15	3	3		3		

Below is an example of the PCT report selecting Type

New NHS Trust
PCT Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

PCT		Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward
		280	4045	40.4%	25	5	16	4	2	242	3
5A8	GREENWICH TEACHING PCT	2	15	0.1%	1		1			1	
5EM	NOTTINGHAM CITY PCT	1	15	0.1%						1	
5FE	PORTSMOUTH CITY TEACHING PCT	1	15	0.1%			1			1	
5FL	BATH AND NORTH EAST SOMERSET	35	650	6.5%	7		4			23	1

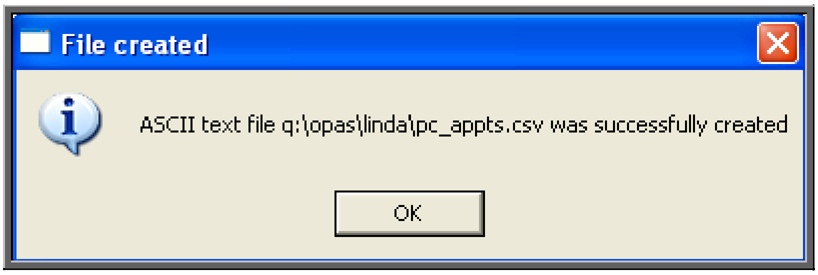
File

A comma separated variable file will be created called

pc_appts.csv if analysed by outcome

pt_appts.csv if analysed by type

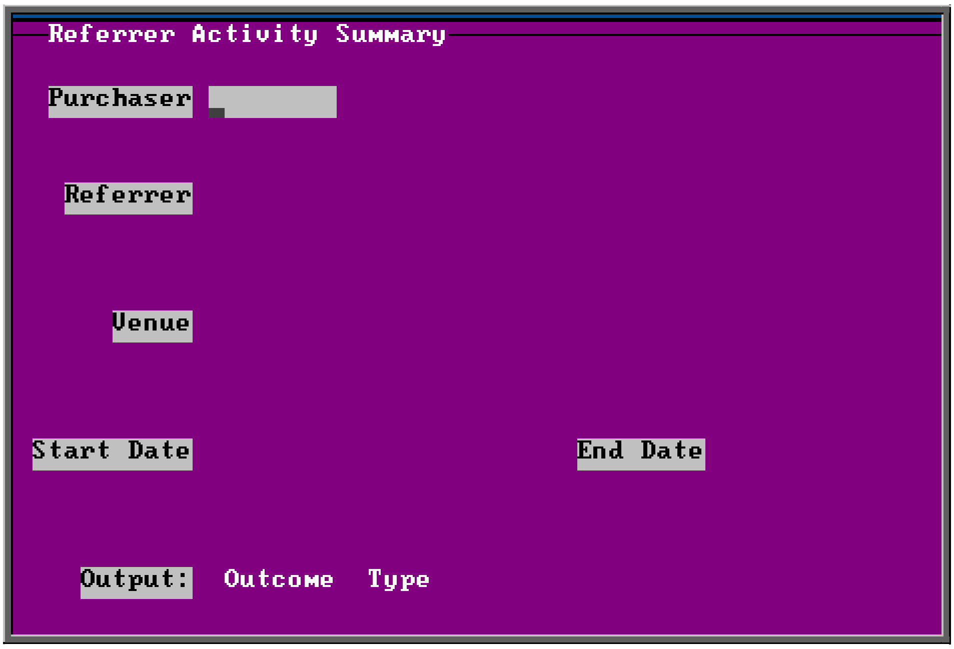
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



18. Summaries – Referrer

Menu: Reports – Appointments – Summaries – Referrers or

Menu: Appointments – Print – Reports – Summaries – Referrers



- 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

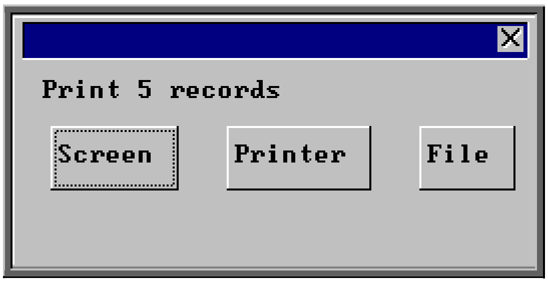
- select a Referrer from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Referrer field empty will result in all referrers being selected

- select the Venue required 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

- select whether the report should analyse by Outcome or Type



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.

Below is an example of the **Referrer** report selecting **Outcome**.

New NHS Trust
Referrer Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

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

Referrer	Total	Time	%age	0	1	2	3	4	5
	60	640	6.4%	34	5	9	5		7
A N Other	29	430	4.3%	19	5	3	1		1
Direct Access GP	15	225	2.2%	11	3	1			
Mr Bloggs	2	15	0.1%	1					1
Mr N Parrish	4	40	0.4%		3		1		
mr smith	5	90	0.9%		5				
Mr Surgeon	616	8570	85.6%	125	394	21	37		39
Grand Total	731	10010		190	415	34	44	0	48

Count 7

Below is an example of the **Referrer** report selecting **Type**

New NHS Trust
Referrer Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Referrer	Total	Time	%age	New	Review	Fit	Supply	Cast
	60	640	6.4%	1	2	1	1	1
A N Other	29	430	4.3%	3	2	10	4	
Direct Access GP	15	225	2.2%	2	2	4		
Mr Bloggs	2	15	0.1%	1				
Mr N Parrish	4	40	0.4%					
mr smith	5	90	0.9%	1				
Mr Surgeon	616	8570	85.6%	54	4	70	3	3
Grand Total	731	10010		62	10	85	8	4

Count 7

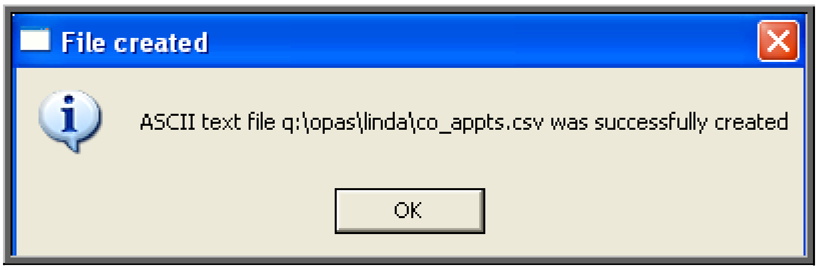
File

A comma separated variable file will be created called

co_appts.csv if analysed by outcome

ct_appts.csv if analysed by type

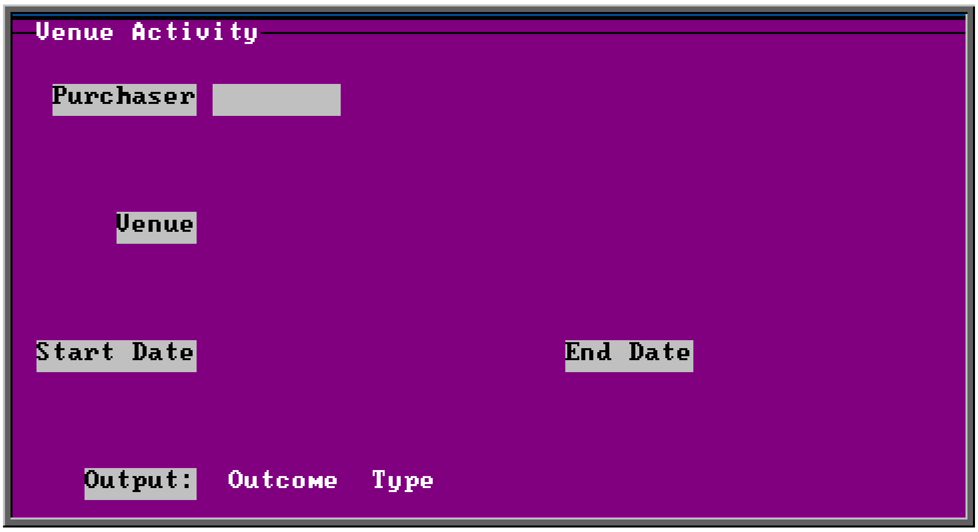
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



19. Summaries – Venues

Menu: Reports – Appointments – Summaries – Venues or

Menu: Appointments – Print – Reports – Summaries – Venues



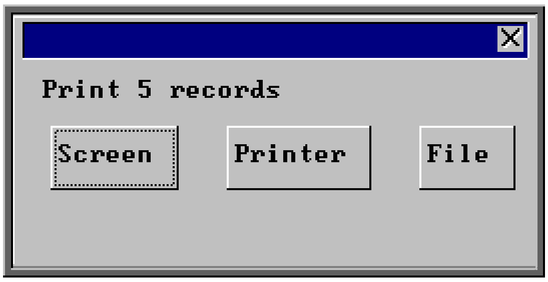
- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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

- select whether the report should analyse by Outcome or Type



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.

Below is an example of the Venue report selecting Outcome.

New NHS Trust
Venues Appointment Activity
ALL PURCHASERS
Start Date: 01/01/2000
End Date: 04/07/2008

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	%age	0	1	2	3
A N Other Clinic	5	90	0.9%	3	1	1	
Diabetic Foot Clinic	3	60	0.6%	1	1	1	
LINDAS SPECIAL CLINIC	11	165	1.6%		11		
MARTINS NOT SO SPECIAL CLINIC	1	10	0.1%		1		
New Clinic	30	630	6.3%	4	22	3	1
Orthotic Clinic	648	8355	83.5%	182	348	27	43
Test	7	100	1.0%		6	1	
TEST AREA	11	165	1.6%		11		
testing	14	420	4.2%		13	1	
Yet Another Test	1	15	0.1%		1		
Grand Total	731	10010		190	415	34	44

Count 10

Below is an example of the Venue report selecting Type

New NHS Trust
Venue Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Directorate	Total	Time	%age	New	Review	Fit	Supply	Cast	Other
A N Other Clinic	5	90	0.9%		1				4
Diabetic Foot Clinic	3	60	0.6%						3
LINDAS SPECIAL CLINIC	11	165	1.6%	1					10
MARTINS NOT SO SPECIAL CLINIC	1	10	0.1%						1
New Clinic	30	630	6.3%	4	2				27
Orthotic Clinic	648	8355	83.5%	55	7	85	7	4	494
Test	7	100	1.0%						7
TEST AREA	11	165	1.6%	1			1		11
testing	14	420	4.2%	1					10
Yet Another Test	1	15	0.1%						1
Grand Total	731	10010		62	10	85	8	4	568

Count 10

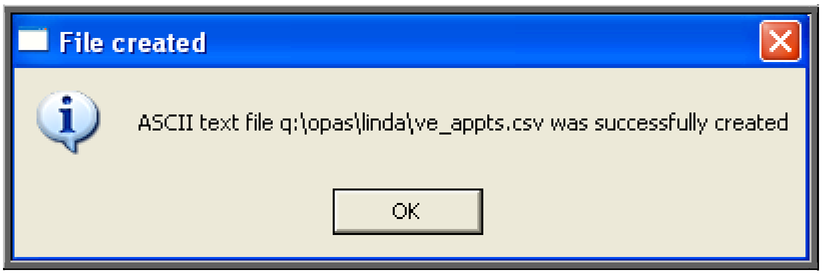
File

A comma separated variable file will be created called

ve_appts.csv if analysed by outcome

vt_appts.csv if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



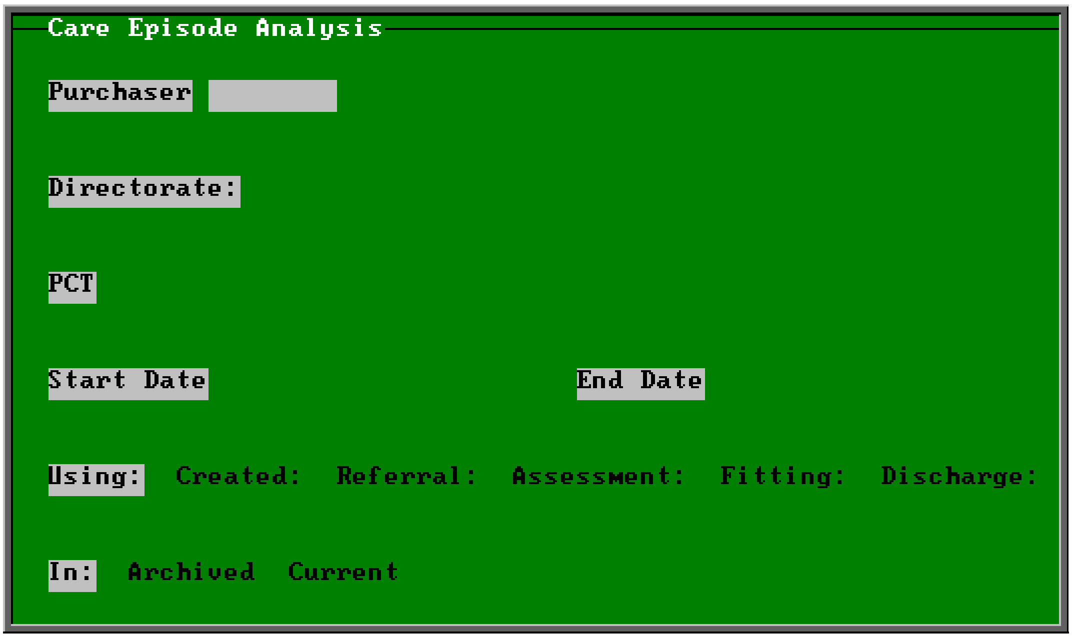
20. Care Episodes (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 2 different batch reports for care episodes. 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.

21. Care Episodes – Analysis

This report can be used to interrogate either current or archived care episodes. Separate report definitions are used, so you can have different layouts for your archived and current care episode reports.

Menu: Reports – Care Episodes – Analysis



- 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 to find all those patients which belong to that directorate. 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

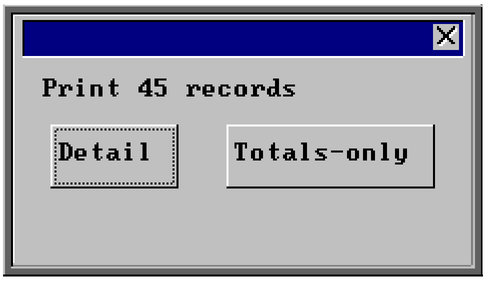
- select the PCT required from the pop-up list to find all those patients which belong to that PCT. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected

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

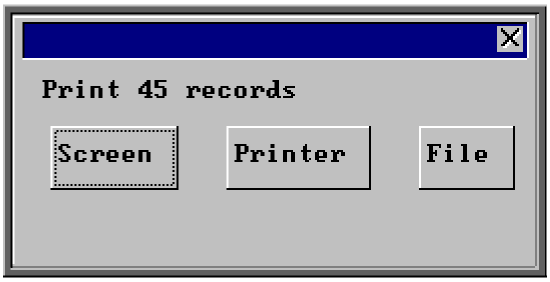
- enter the End date of the required date range in the format DD MM YYYY

- select whether the date range selected should look at the care episodes Created, Referral, Assessment, Fitting or Discharge date

- select whether you want to interrogate Current or Archived care episodes



You will be shown how many care episodes OPAS has found and ask if you want to see the information in Detail i.e. a line for each waiting list entry or just Totals-only



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.

Below is an example of the **Analysis** report selecting **Detail**.

Hospital No	Patient	Appoints	Time	Orders	Net:	Gross:
NAH280965	MR JAMES BROWN	0	0:00	1	64.00	64.00
12345QWERTY	MR KELVIN BLOGGS	10	1:45	1	123.45	145.05
NTEMP000010	MR MARTIN CRAVEN	1	0:15	1	220.00	220.00
NDR543387	MR GEORGE SMITH	1	0:15	1	197.00	231.48
8776877	Mr Sylvester Stalone	2	0:00	3	168.95	198.51

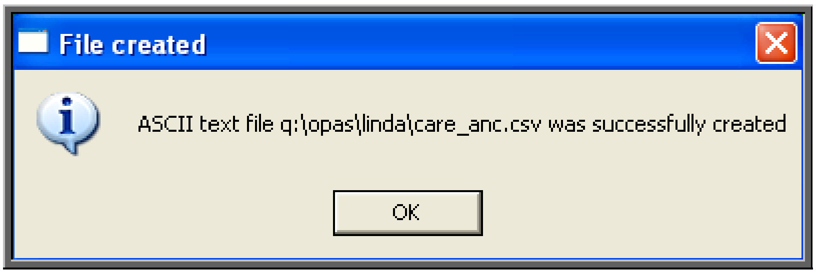
Page 1 dated 17/06/2008
Printed by LINDA
care_ana.dfr - Archived Care Episodes

The footer in the bottom left corner of the report will indicate whether the report is on current or archived care episodes

The report layouts (care_ana.dfr and care_anc.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

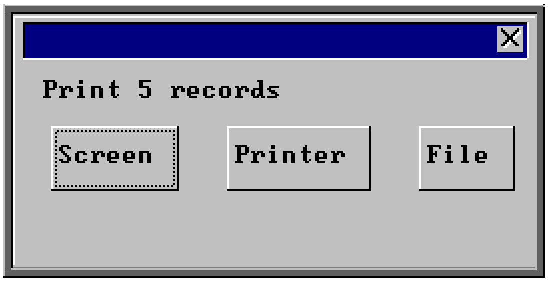
A comma separated variable file will be created called care_anc.csv if analysing current care episodes and care_ana.csv for the archived care episodes. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



22. Care Episodes – Current

This report interrogates your current care episodes and finds those that are still active (i.e. there is no date of discharge entered).

Menu: Reports – Care Episodes – Current



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.

Below is an example of the Current report.

Case :	Hospital No	Patient	Referral :	Assessment :	Target Date :	Weeks wait to date
CE00049	NQWE345768	MR JOHN SMYTHE	13/01/2008		18/05/2008	3
CE00051	67567	Mr Phil Oakey	13/01/2008	04/02/2008	18/05/2008	3
CE00050	432523	Mr John Brown	13/01/2008		18/05/2008	3
CE00052	NAH280965	MR JAMES BROWN	04/02/2008		09/06/2008	0
	Total for NHS TRUST	13				
CE00011	NTEMP000009	MS MARY LITTLE	02/09/1999		06/01/2000	440
CE00015	NQ123432	MR TONY JACK	20/12/1999		24/04/2000	424
CE00022	NA61848	MR PAUL LAKE	31/05/2000		04/10/2000	401
	Total for Primary Care Group	3				

The report layout (care.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

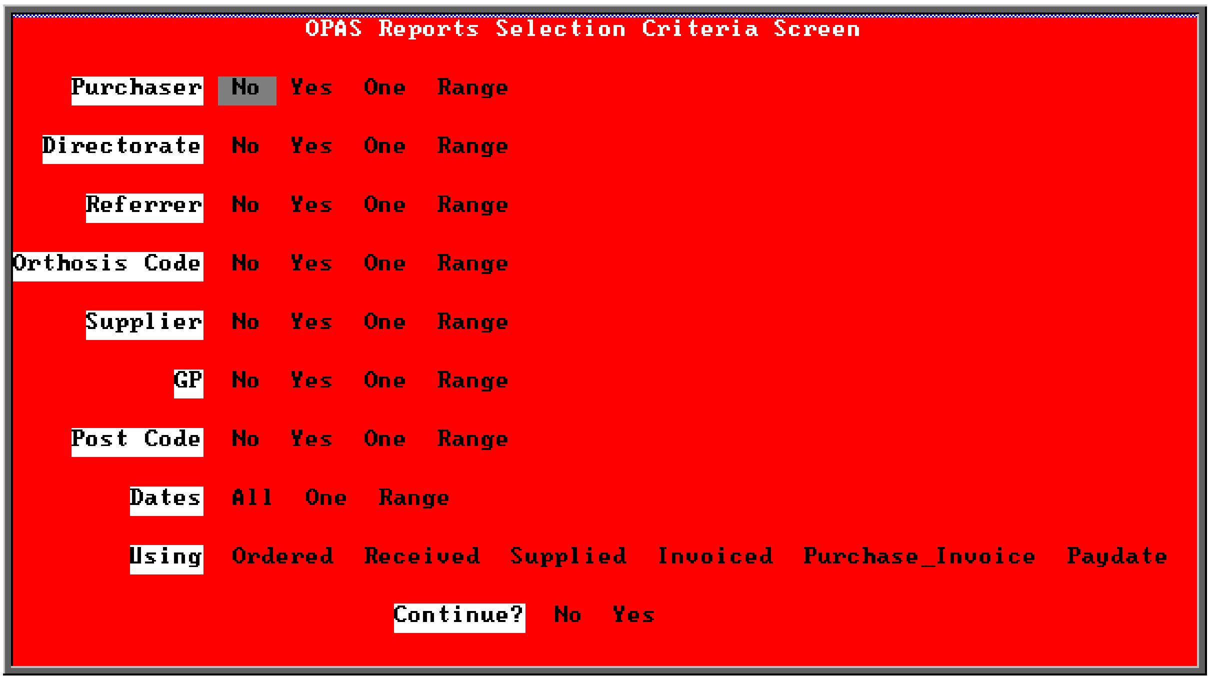
A comma separated variable file will be created called cur_care.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.

23. Financial Reports (Ad Hoc)

The Ad hoc report gives you the flexibility to report on specific order information by completing the selection criteria screen appropriately.

Menu: Reports – Financial – Ad hoc or

Menu: History – Reports – Ad hoc



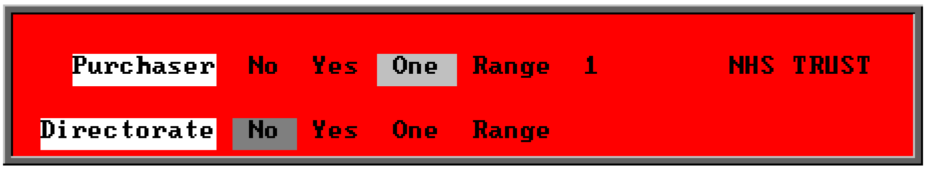
Purchaser

Select

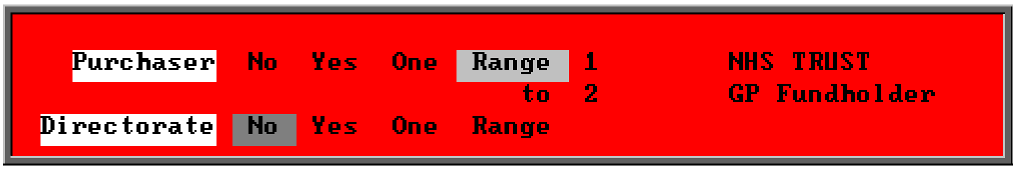
No — if all Purchasers are to be included in the report but you **do not** require a sub-total for each Purchaser

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

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.



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.



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

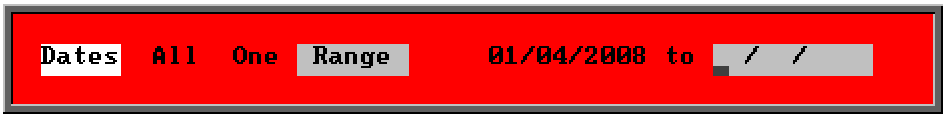
All if you want to report on all orders on OPAS.

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.

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 ‘end’ date in the next space provided in the format DD MM YYYY and press **Enter**.



Using

Select

Ordered	if you want to report on those orders that have an order date within the dates selected above
Received	if you want to report on those orders that were received within the dates selected above
Supplied	if you want to report on those orders that were supplied within the dates selected above
Invoiced	if you want to report on those orders where the date of the suppliers invoice is within the dates selected above
Purchase_ Invoice	if you want to report on those orders where the date of the purchase invoice is within the dates selected above
Paydate	if you want to report on those orders that were the passed for payment date is within the dates selected above

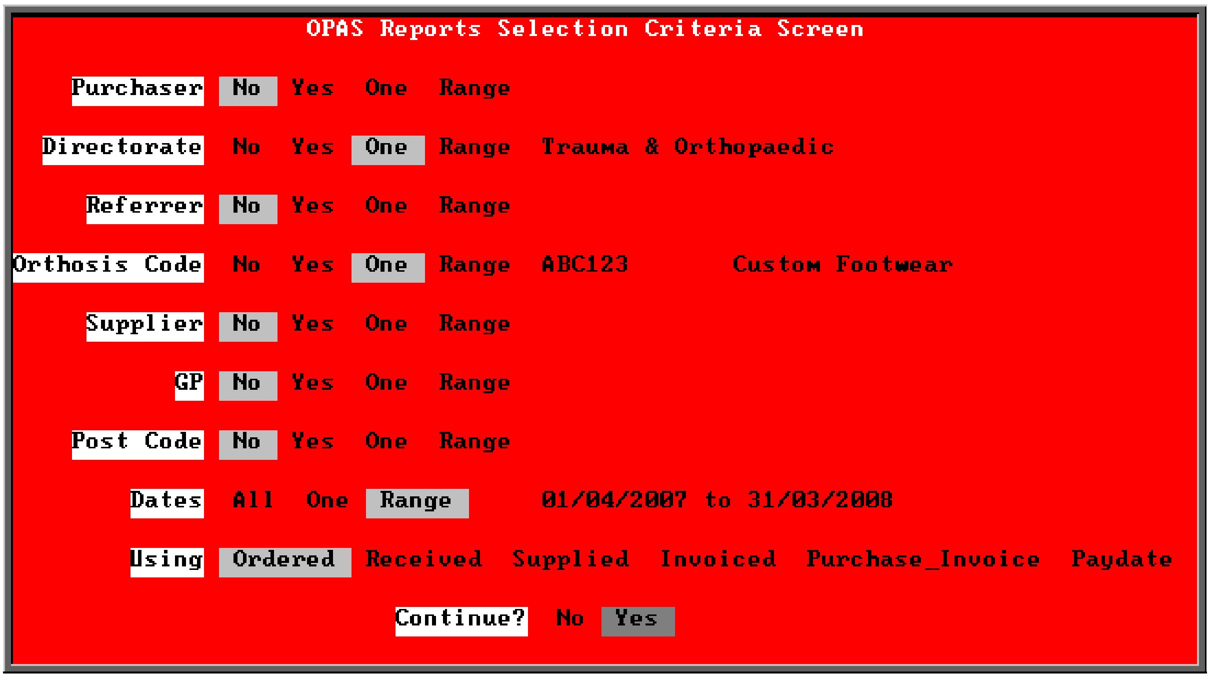
Continue

Select

No	if you wish to abandon the Ad hoc report screen

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.

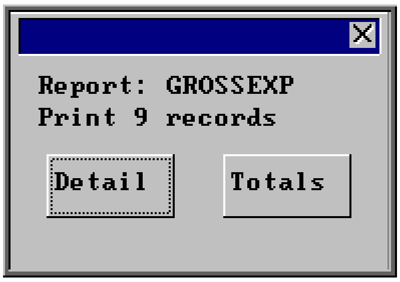


Once you have selected Yes to continue, OPAS will search for all those orders that match the criteria selected. If no matches are found, the following message will appear.

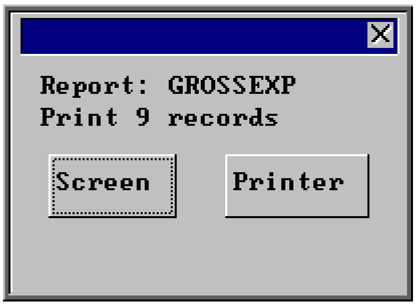
If orders have been found that match your criteria then this Reports menu will appear.

Gross Expenditure

If you wish to see the value of the orders including VAT, select Gross Expenditure.

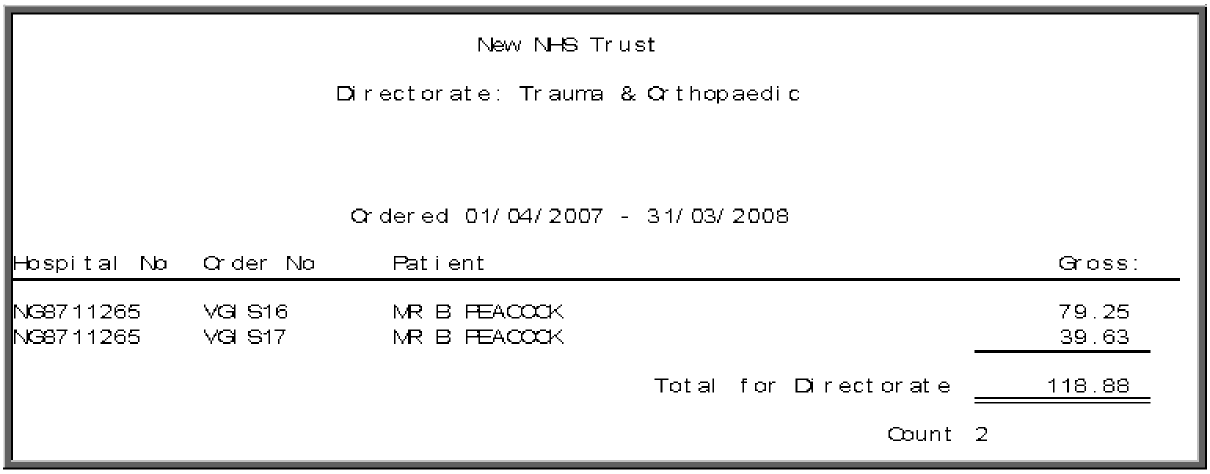


You will be shown how many orders OPAS has found and ask if you want to see the information in Detail i.e. a line for each order or just Totals



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.

Below is an example of the Gross Expenditure report selecting Detail.



New NHS Trust

Directorate: Trauma & Orthopaedic

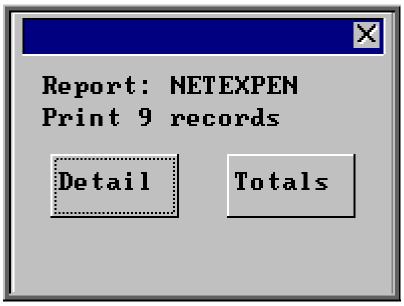
Ordered 01/04/2007 - 31/03/2008

Hospital No	Order No	Patient	Gross:
NG8711265	VGIS16	MR B PEACOCK	79.25
NG8711265	VGIS17	MR B PEACOCK	39.63
		Total for Directorate	118.88
		Count	2

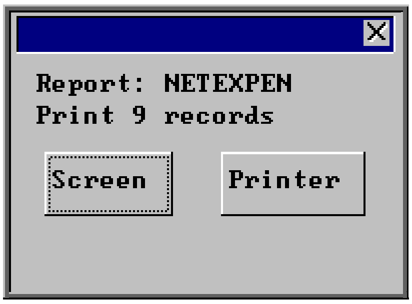
The report layout (grossexp.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

Net Expenditure

If you wish to see the value of the orders excluding VAT, select Net Expenditure.

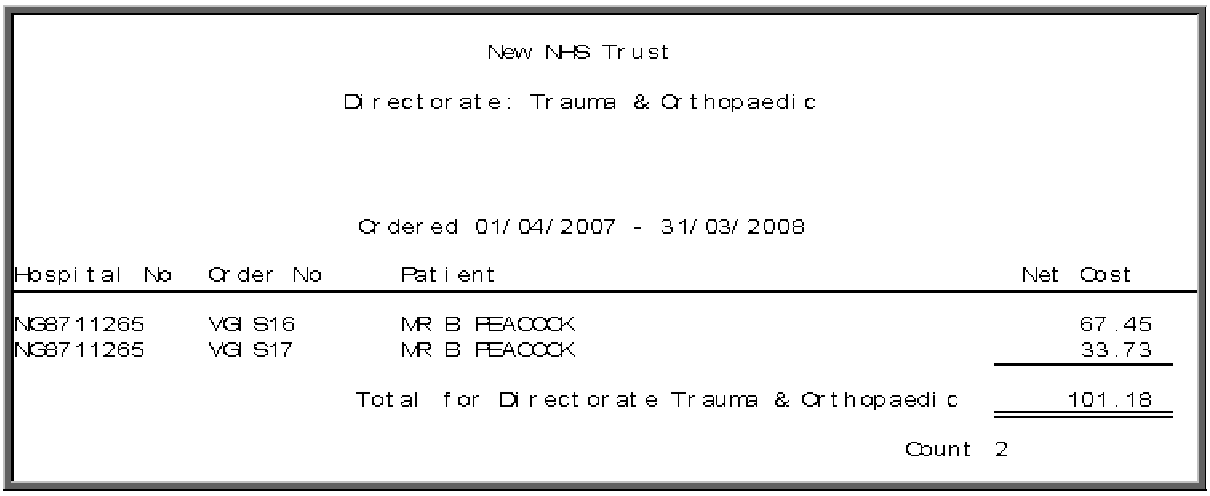


You will be shown how many orders OPAS has found and ask if you want to see the information in detail i.e. a line for each order or just totals



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.

Below is an example of the Net Expenditure report selecting Detail.



New NHS Trust

Directorate: Trauma & Orthopaedic

Ordered 01/04/2007 - 31/03/2008

Hospital No	Order No	Patient	Net Cost
NG8711265	VGI S16	MR B PEACOCK	67.45
NG8711265	VGI S17	MR B PEACOCK	33.73
		Total for Directorate Trauma & Orthopaedic	101.18
		Count 2	

The report layout (netexpen.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

Datafile

The Datafile option saves the information found as a comma separated variable file so that the data can be exported into a spreadsheet for manipulation, or into a report.

Having selected Datafile, 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.

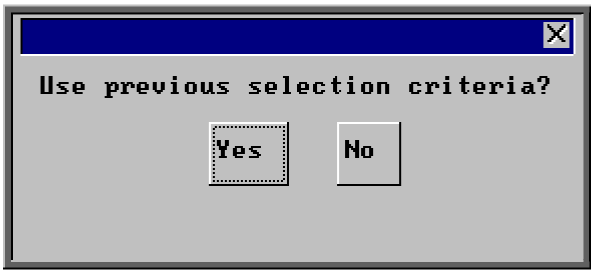
Fieldname	Type	Length	Filename	On table
Order No	Alpha	10	applianc	No
Order Ref	Counter	8	applianc	No
Post Code	Alpha	15	patients	No
Fit	Alpha	1	purchase	No
Pass	Alpha	1	applianc	No
Paydate	Date	8	applianc	No
Hsp Ord No	Alpha	20	applianc	No
Date of Order	Date	8	applianc	No
Sup Inv No	Alpha	10	applianc	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 comma separated variable file will be created in your personal directory.

The file name will use a counter so that the first time this is done the file will be saved as opas001.csv and then opas002.csv and so on. This can now be opened in Lotus123 or MS Excel.

	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.

24. 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.

25. Financial report - 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.

Menu: Reports – Financial – Batches – Activity or

Menu: History – Reports – Batches – Activity

- 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 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.

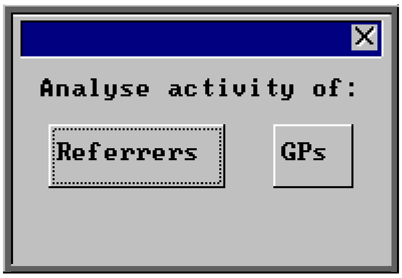
- select the GP required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the GP field empty will result in all GPs being selected.

- select In-patients, Out-patients or Both. Press the space bar to move the highlight onto the required option.

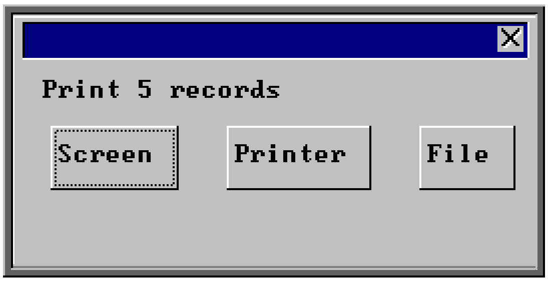
- enter the Start date of the required date range in the format DD MM YYYY.

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

- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



Select whether the data is to be analysed by Referrers 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.

Below is an example of the Activity report, selecting Referrer.

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	

The report layout (bat_act.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

26. Financial report – Clinician

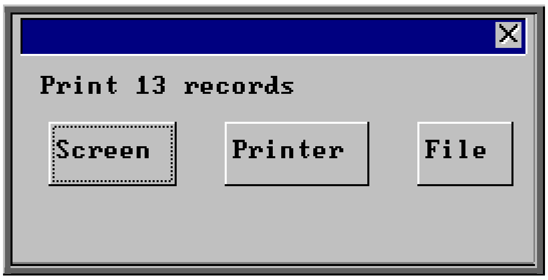
The Clinician report gives detail of expenditure by Clinician. The report can be analysed by Orthosis Code or Directorate.

Menu: Reports – Financial – Batches – Clinician or

Menu: History – Reports – Batches – Clinician

- 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 Venue required 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.
- 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 Clinician field empty will result in all clinicians being selected
- select Orthosis_code 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.
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.

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-only



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 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 selecting Orthosis_code and Detail.

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

The report layouts (bat_ortc.dfr and bat_ortd.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

bat_ortc.csv	if Orthosis_code is selected
bat_ortd.csv	if Directorate is selected

This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

27. Financial report - Clinics

The Clinics report will breakdown the expenditure by the *Clinic* (Venue) field on the orders.

Menu: Reports – Financial – Batches – Clinics or

Menu: History – Reports – Batches – Clinic

- 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.

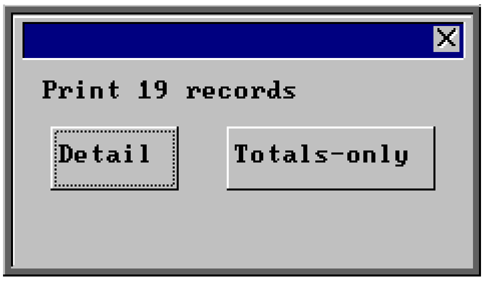
- select the Venue required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected.

- 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

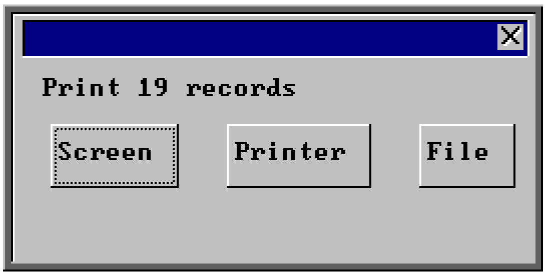
- enter the Start date of the required date range in the format DD MM YYYY.

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

- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



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-only



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.

Below is an example of the **Clinics** report.

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	G3350674	A YOUNG	14.38
	XYZ890	G9202344	D FREAKE	239.37
	999999	G3355370	D EYRE	64.51
	ABC123	ABC21234	MISS T EYES	328.29
	999999	01232195	J HAMILTON	2.17
	ABC123	G0326425	H CARNE	363.94
	ABC123	TEMP000010	MR M CRAVEN	363.94
	999999	TORUS004	MISS T SMITH	346.87
	ABC123	G0230753	R BENNET	64.08
	111111	12345QWERTY	MR K BLOGGS	25.85
	ABC123	TMP000013	A HARTIGAN	9.72
	ABC123	12345QWERTY	MR K BLOGGS	0.00
			Total	1,823.12
			Count	12
			Total for Consultant	1,823.12
			Count	12

The report layout (bat_clin.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

28. Financial report – Cost Code

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).

Menu: Reports – Financial – Batches – Cost Code or

Menu: History – Reports – Batches – Cost Code

- 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

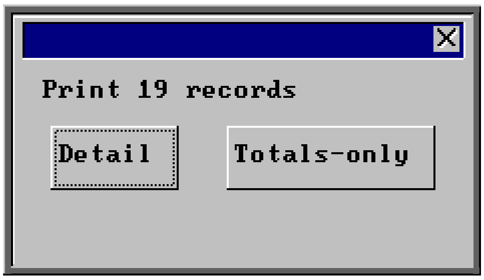
- select the Orthosis Code required from the pop-up list. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the Orthosis Code field empty will result in all orthosis codes being selected

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

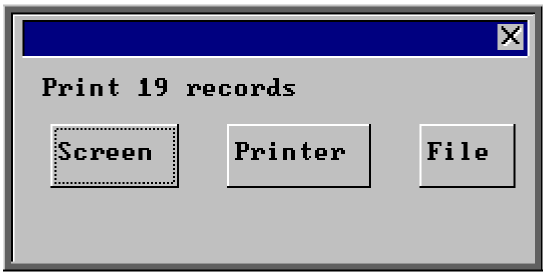
- enter the End date of the required date range in the format DD MM YYYY.

- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.

- 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-only



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.

Below is an example of the Cost Code report with No reconciliation

New User NHS Trust
Amount Spent by Cost Code (NHS TRUST)
01/01/2000 to 31/12/2003

Cost Code		Net	Gross	Sell
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		

The report layout (costcode.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called **costcode.csv.** 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.

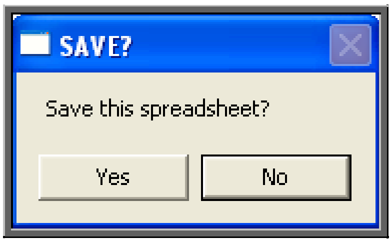
Select Sell if you want to know the value the goods were sold on for. If you select Sell you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

Below is an example of a spreadsheet produced by selecting Net and Directorate.

	1	2	3	4	5	6
1	Cost-code reconciliation					
2	ALL PURCHASERS by Supplier					
3	01/01/2000 - 06/07/2008					
4	Count					
5		111111	999999	ABC123	XYZ890	Totals
6	Jane Saunders & Mann	1.00			1.00	2.00
7	Peacocks Medical Gro	4.00	1.00	2.00	2.00	9.00
8	RSL Steeper	1.00				1.00
9	STOCK	1.00				1.00
10		----------	----------	----------	----------	----------
11	Totals	7.00	1.00	2.00	3.00	13.00
12		==========	==========	==========	==========	==========
13						

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 - 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.

Menu: Reports – Financial – Batches – Creditors or

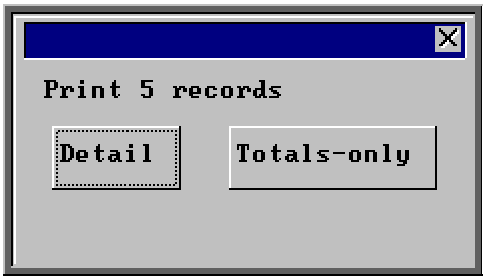
Menu: History – Reports – Batches – Creditors

- 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

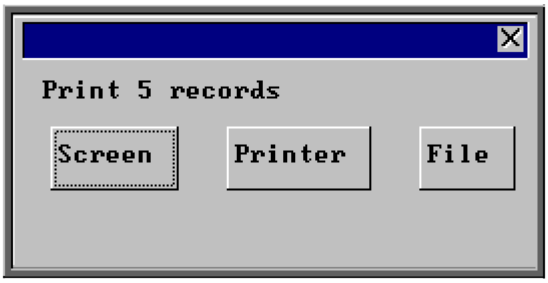
- select the Supplier required from the pop-up list. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected

- 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.



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-only



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.

Below is an example of the **Creditors** report.

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	300.00
987656789	14/10/2003			KELVIN	BLOGGS	300.00
G00357	31/10/2001	05/06/2002		FRED	BLOGGS	103.26
G00396	28/04/2003			TEE	EYES	322.04
			Total for Halo Healthcare Ltd			1,026.90

The report layout (bat_cr.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

30. Financial report - 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).

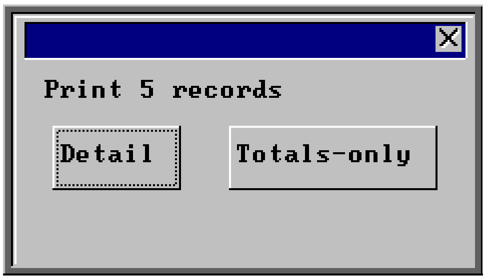
Menu: Reports – Financial – Batches – Debtors   or

Menu: History – Reports – Batches – Debtors

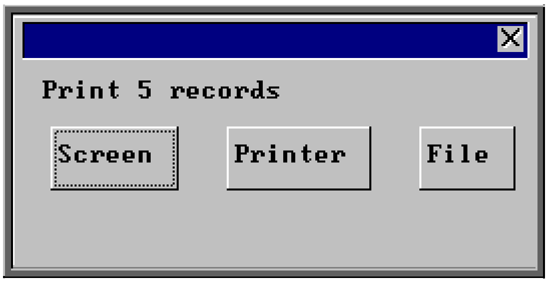
- select the Purchaser required from the pop-up list. If you select a Purchaser that is not an external purchaser the following message will appear. Press the Tab key to bring the pop-up list back and make another selection. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all external 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-only



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.

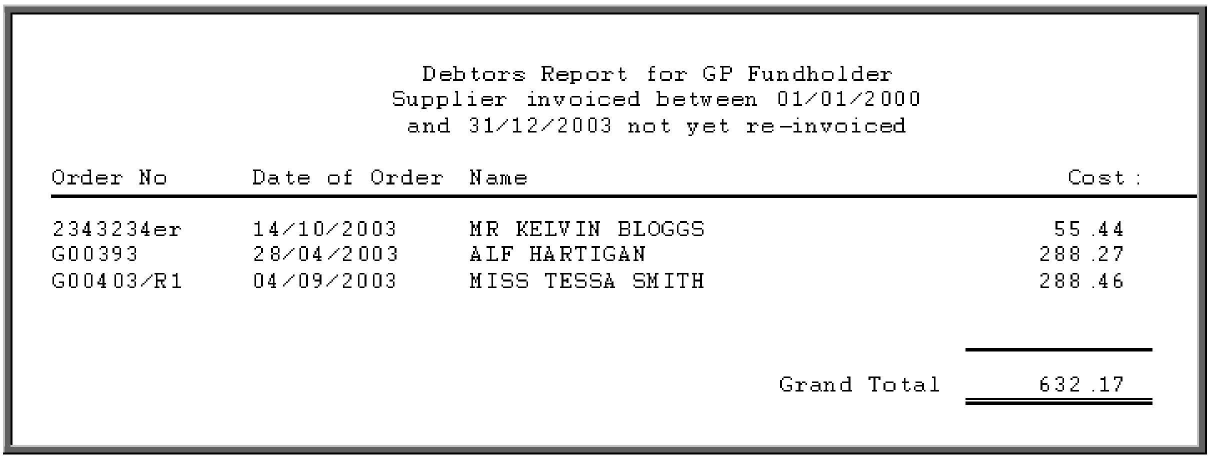
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Debtors report.



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

The report layout (bat_dr.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

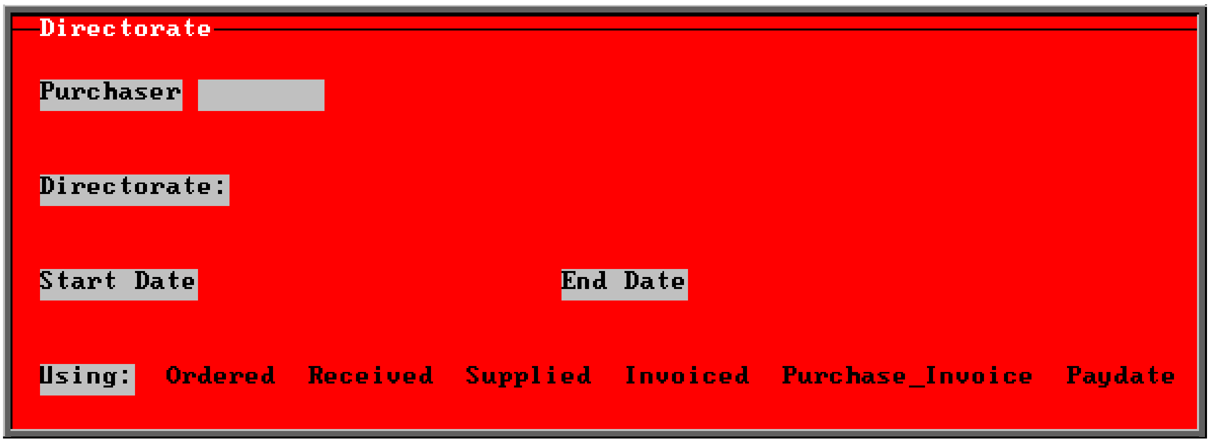
A comma separated variable file will be created called bat_dr.csv. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

31. Financial report – Directorate

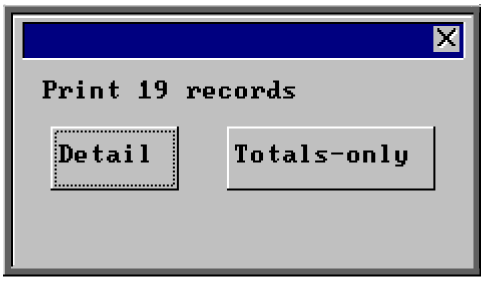
The Directorate report will breakdown the expenditure on orders by Directorate.

Menu: Reports – Financial – Batches – Directorate or

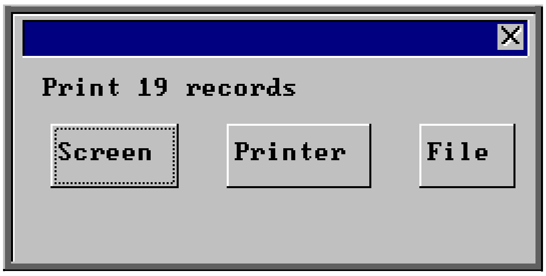
Menu: History – Reports – Batches – Directorate



- 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 the Direectorate 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.
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



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-only



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.

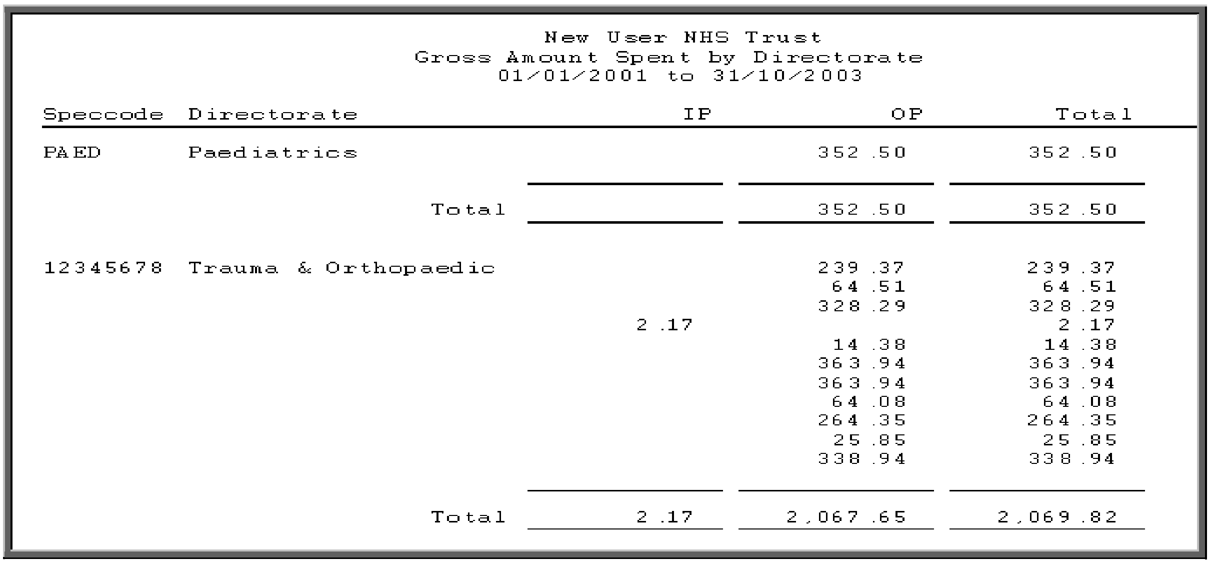
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Directorate report.



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
				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

The report layout (direct.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

32. Financial report – Emailed

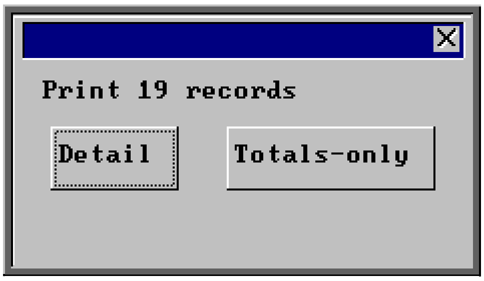
This report is will provide a breakdown of orders that have been sent to the supplier via email.

Menu: Reports – Financial – Batches – Emailed or

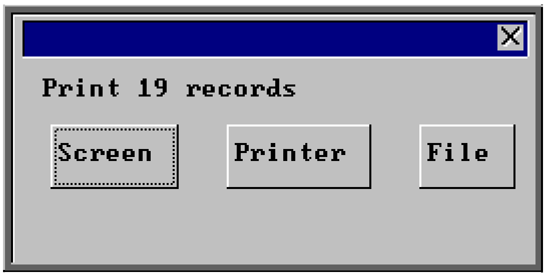
Menu: History – Reports – Batches – Emailed

- 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. The list of suppliers will show only those that are set up for emailing. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all email 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
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



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-only



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.

Below is an example of the **Emailed** report.

Emailed Orders
Ordered 01/01/2007 - 10/06/2008
All Purchasers - All Suppliers

Supplier	Order No	Date of Order	Orth Code	Received	Cost
Peacocks Medical Group Ltd	PA00004	07/06/2007	111111		0.00
	VGIS1	09/10/2007	111111		150.00
				Total	150.00
				Count	2
Jane Saunders & Manning Ltd	MA00003	05/06/2007	ABC123	02/06/2008	0.00

The report layout (emailed.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

33. Financial report - GPs

The **GPs** report will analyse the expenditure on orders by the patients GP.

Menu: Reports – Financial – Batches – GPs or

Menu: History – Reports – Batches – GPs

- 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 PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected.

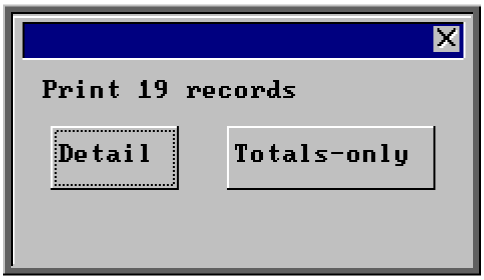
- select the Practice required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Practice field empty will result in all practices being selected.

- select the GP required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the GP field empty will result in all GPs being selected.

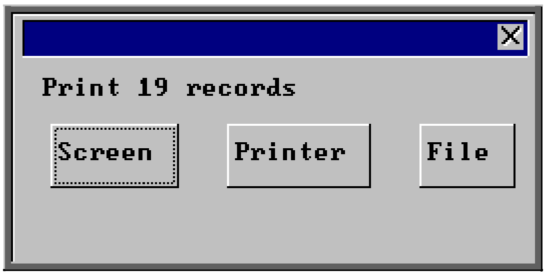
- enter the Start date of the required date range in the format DD MM YYYY

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

- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



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-only



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.

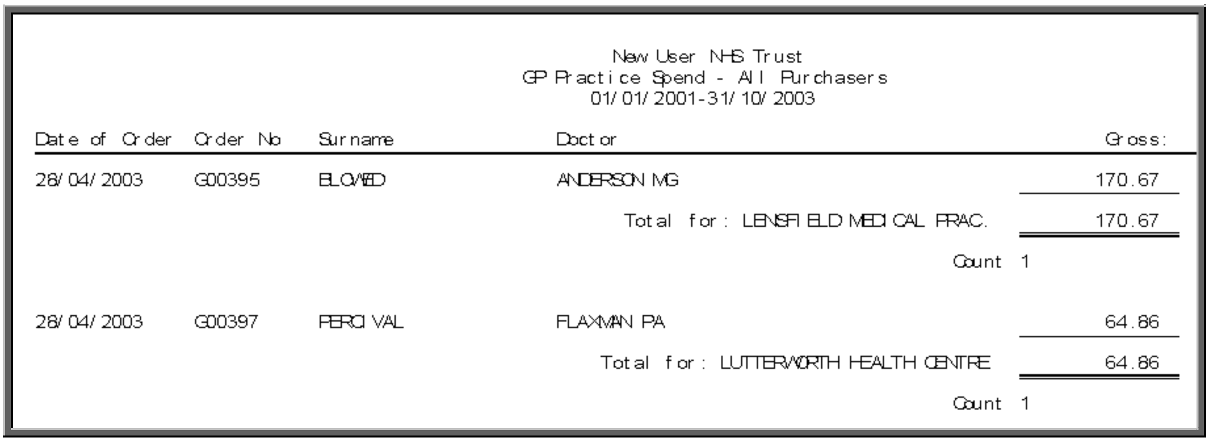
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the GP report.



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	PERCIVAL	FLAXMAN PA	64.86
			Total for: LUTTERWORTH HEALTH CENTRE	64.86
			Count 1	

The report layout (bat_gp.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

34. Financial report – 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.

Menu: Reports – Financial – Batches – Graphs or

Menu: History – Reports – Batches – Graphs

- 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 which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.

- select what the data is to be analysed by i.e. on Orthosis_codes 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

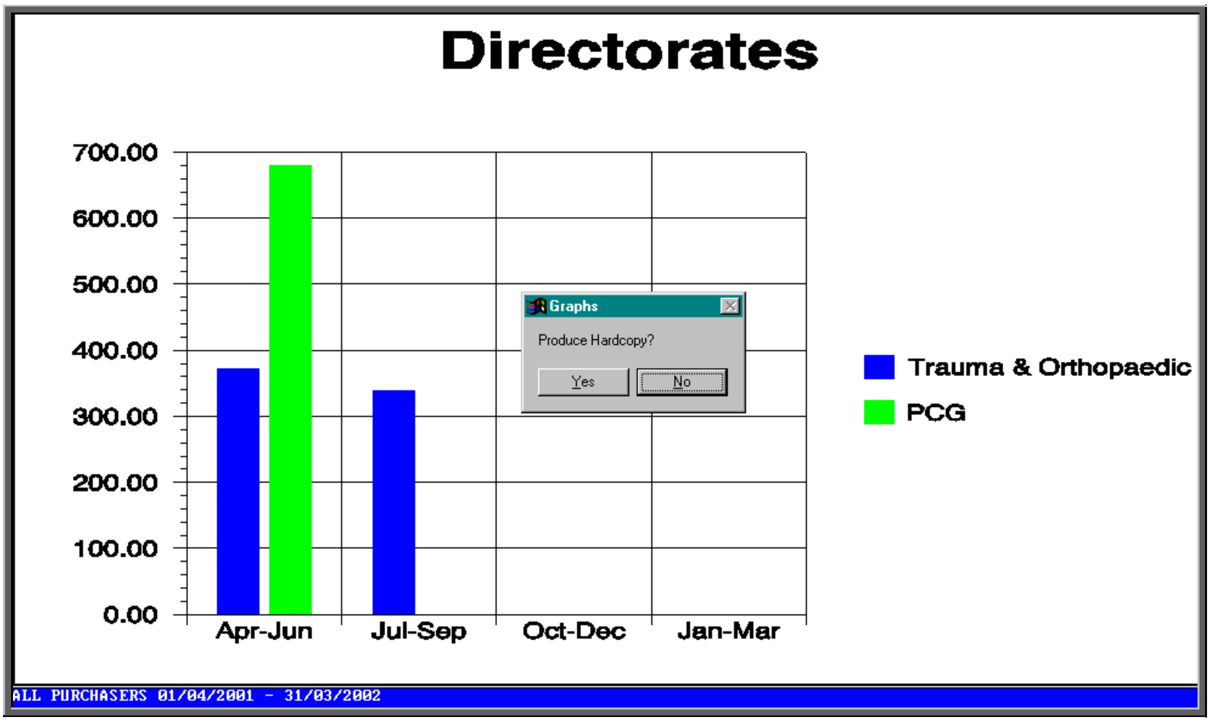
  select Type 1 to see the first quarter (1 April – 30 June) broken down by month

  select Type 2 to see the second quarter (1 July – 30 September) broken down by month

  select Type 3 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



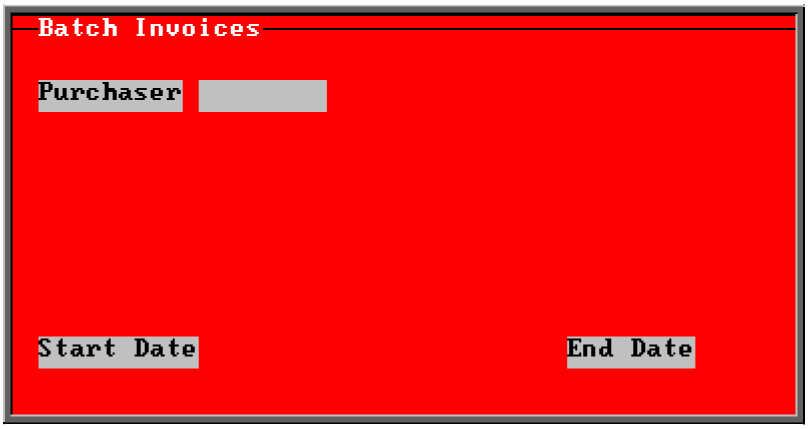
The graph will appear on the screen, but you have the option to print a hardcopy.

35. Financial report - Invoices

The Invoices report shows details of orders where the supplier invoices have been received.

Menu: Reports – Financial – Batches – Invoices or

Menu: History – Reports – Batches – 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

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-only

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.

Below is an example of the Invoice report.

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	

The report layout (bat_inv.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

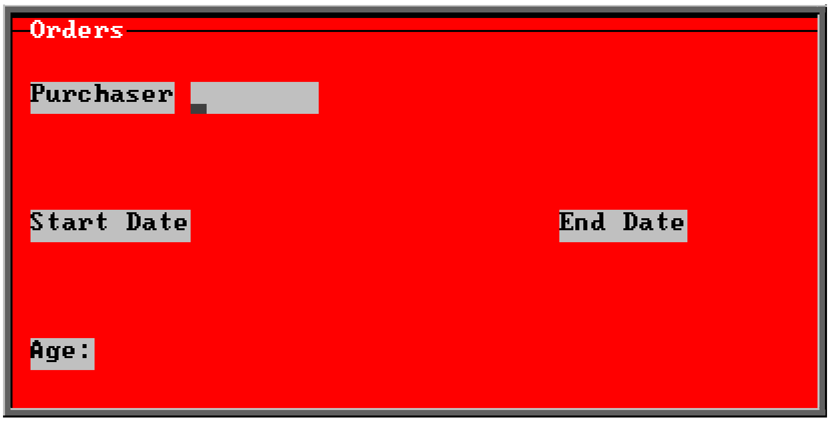
A comma separated variable file will be created called bat_inv.csv. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

36. Financial report - Orders

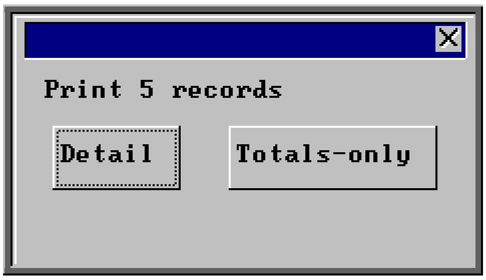
The Orders report shows details of orders raised over a specific period.

Menu: Reports – Financial – Batches – Orders or

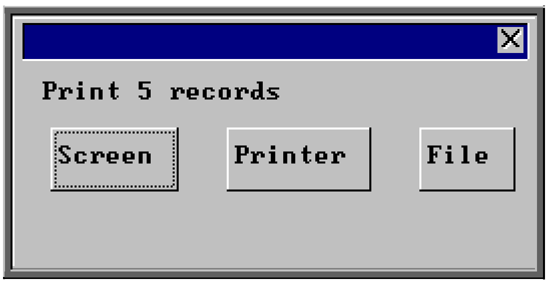
Menu: History – Reports – Batches – Orders



- 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-only



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.

Below is an example of the Orders report.

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	56756544	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	WI234	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

The report layout (orders.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called orders.csv. 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.

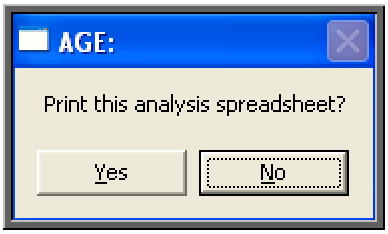
Select Gross if you want to know the value of the orders including VAT.

Select Sell if you want to know the value the goods were sold on for.

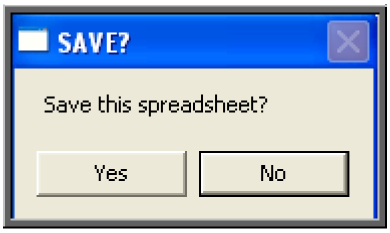
Below is an example of a spreadsheet produced by selecting Net.

	1	2	3	4	5	6	7	8
1	Age Analysis							
2								
3	01/01/2000 - 06/07/2008							
4	Count							
5		0-5	6-16	17-30	31-50	51-65	66+	Totals
6	1				3.00	2.00	3.00	8.00
7	2					1.00		1.00
8	4							0.00
9	5						1.00	1.00
10		----------	----------	----------	----------	----------	----------	----------
11	Totals				3.00	3.00	4.00	10.00
12		==========	==========	==========	==========	==========	==========	==========
13								

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.

37. Financial report – Payments

This report will show those orders that have been passed for payment between the selected dates

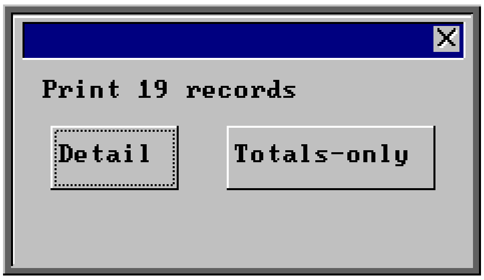
Menu: Reports – Financial – Batches – Payments or

Menu: History – Reports – Batches – Payments

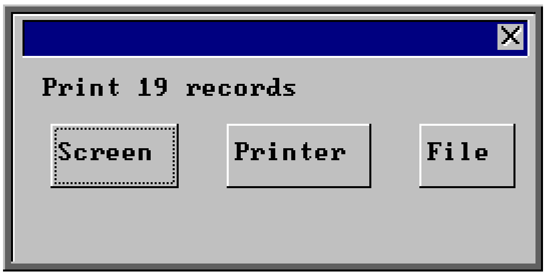
- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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-only



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.

Below is and example of the Payments report.

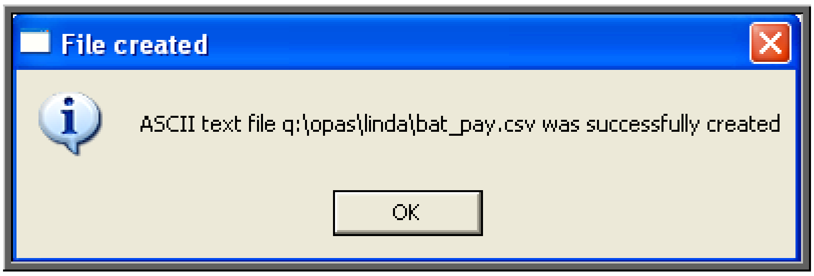
New User NHS Trust
Invoices Passed for Payment
01/01/2000 to 31/10/2003

Pay date	Date of Order	Order No	Sup Inv No	Invoice Date	Net	Gross
31/03/2003	12/06/2001	WI234	01010	13/06/2001	279.39	328.29
27/04/2003	28/05/2001	G00351	55442	15/04/2003	203.72	239.37
		Total for Halo Healthcare Ltd			483.11	567.66
27/04/2003	28/05/2001	G00350	11211	01/04/2003	12.24	14.38
		Total for Tyco Healthcare (UK) Ltd			12.24	14.38

The report layout (bat_pay.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

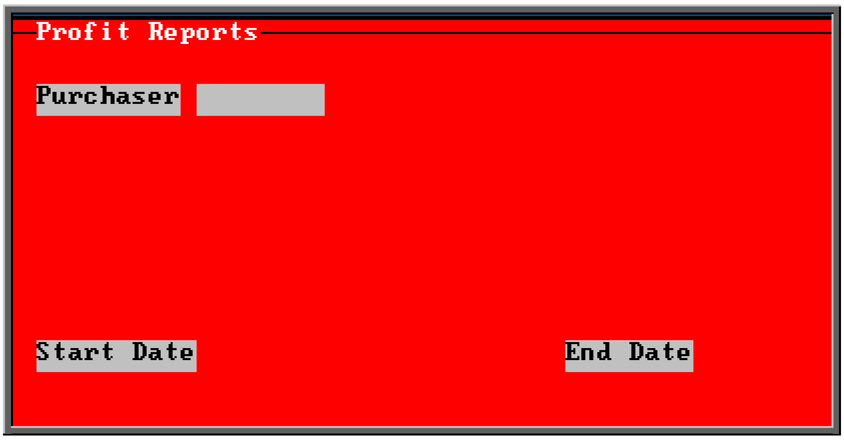


38. Financial report – Profit

This 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.

Menu: Reports – Financial – Batches – Profit or

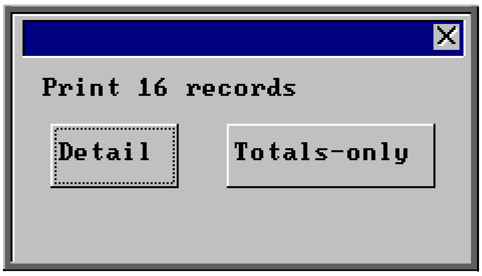
Menu: Orders – Reports – Batches – Profit



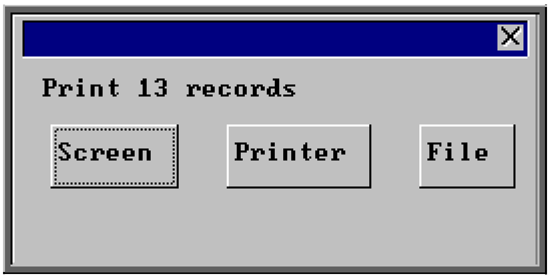
- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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-only



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 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 Profit report.

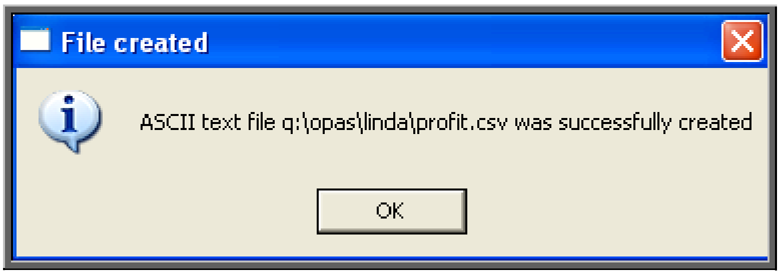
New User NHS Trust
Profit report for A N OTHER
01/01/2001 to 31/10/2003

Order No	Purchase Total	Purchase VAT	Sales Total	Sales VAT	Profit
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
Totals	1068.17	159.09	1069.45	187.14	126.94

The report layout (profit.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



39. Financial report – Progress

This report has two uses. It can either provide the information needed to chase suppliers that have not delivered goods by the expected supply date, or it can be used to find those orders with a specific action e.g. returned or supplied.

Menu: Reports – Financial – Batches – Progress or

Menu: Orders – Reports – Batches – Progress

- 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
- *Action*: Leave this field blank if you want to find orders that have not been received.

  Alternatively, this field can be used to find orders **O**rdered, Booked **I**n, **R**eturned or **S**upplied within the date range specified. To do this, type the appropriate letter into the *Action:* field (O, I, R or S)
- 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: If the Action is left blank 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.

Below is an example of the Progress report leaving the *Action:* field blank.

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	XYZ890	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	PERCIVAL	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	....
	WREN	G00391	ABC123	25/04/2003	23/05/2003	....

The report layout (bat_prog.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

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.

Below is an example of the Progress report selecting the *Action:* I (In).

Progress Report All Purchasers
Orders Received between
01/01/2008 - 06/07/2008

Purchaser	Order	GRN	Supplier	Description
NHS TRUST	PA00046		Ken Hall Ltd	Cast
NHS TRUST	PA00046		Ken Hall Ltd	Cast
NHS TRUST	PA00064		Halo Healthcare Ltd	test
NHS TRUST	PA00072		Relief Orthotics Lim	Shoes

The report layout (bat_proa.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

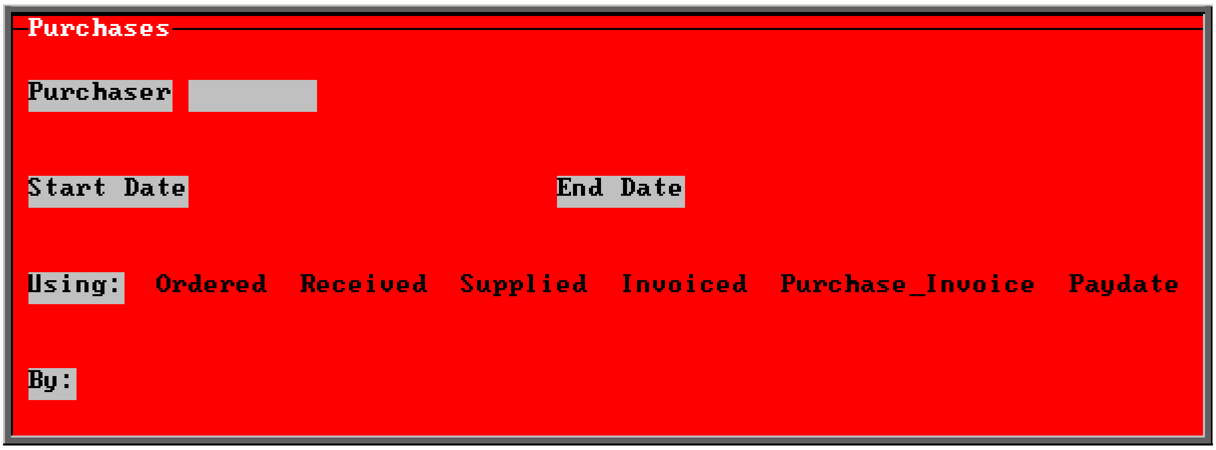
A comma separated variable file will be created called bat_proa.txt. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

40. Financial report – Purchases

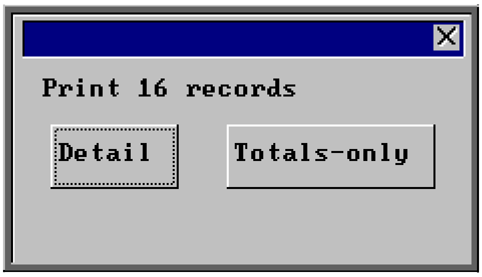
The Purchases report is a quick way of getting totals of expenditure, analysed by Referrer, Directorate, GP, Orthosis Code or Supplier.

Menu: Reports – Financial – Batches – Purchases or

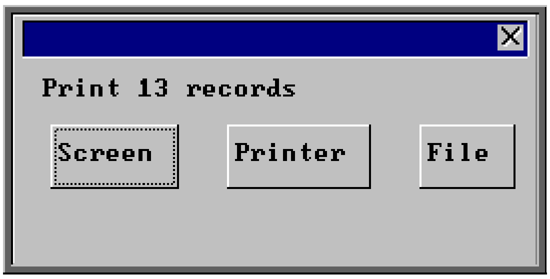
Menu: History – Reports – Batches – Purchases



- 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 which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.
- select what the data is to be analysed *By:* i.e. on Clinician, Referrer, Directorate, GP, PCT, Orthosis_code, Purchaser, User or Supplier. Use the space bar to move between options



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-only



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 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 of the Purchaser report analysing by Directorate, and selecting Totals-only.

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

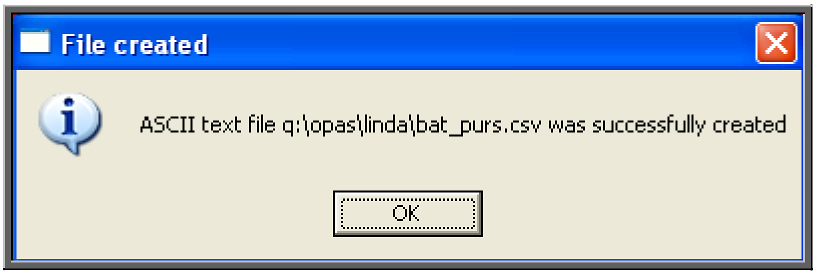
The report layout (bat_purd.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

bat_purc.csv	if clinician is selected
bat_puro.csv	if orthosis code is selected
bat_purd.csv	if directorate is selected
bat_purg.csv	if GP is selected
bat_purt.csv	if PCT is selected
bat_purp.csv	if purchaser is selected
bat_purr.csv	if referrer is selected
bat_purs.csv	if supplier is selected
bat_puru.csv	if user is selected

This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

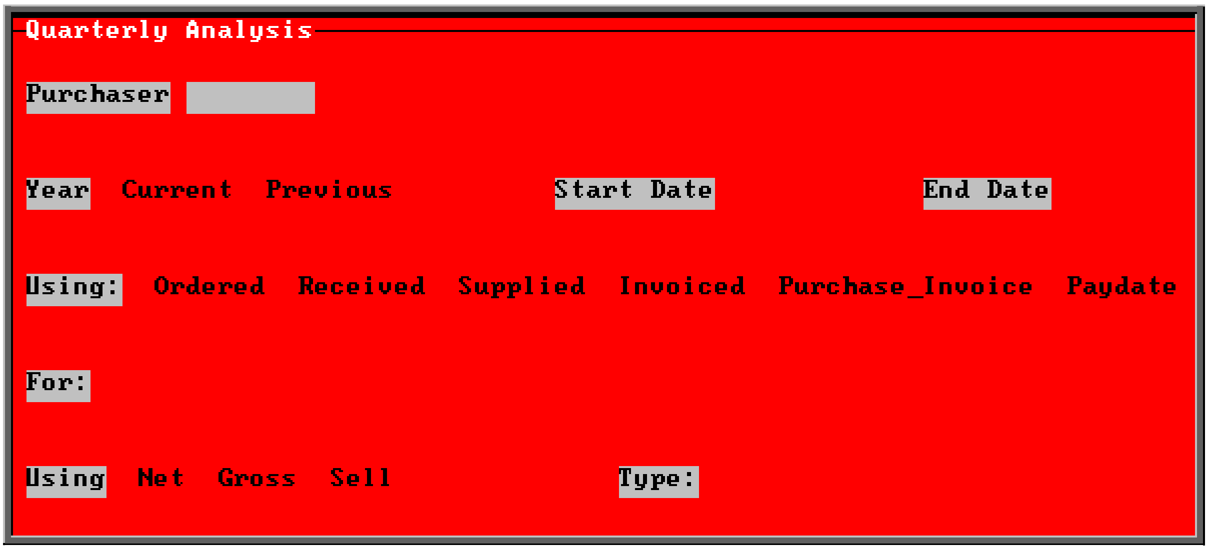


41. Financial report – Quarterly

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.

Menu: Reports – Financial – Batches – Quarterly or

Menu: History – Reports – Batches – Quarterly



- 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 which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.

- select what the data is to be analysed by i.e. on Orthosis_codes 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 M to see the full year broken down by month

  select Type Q to see the full year broken down by quarters

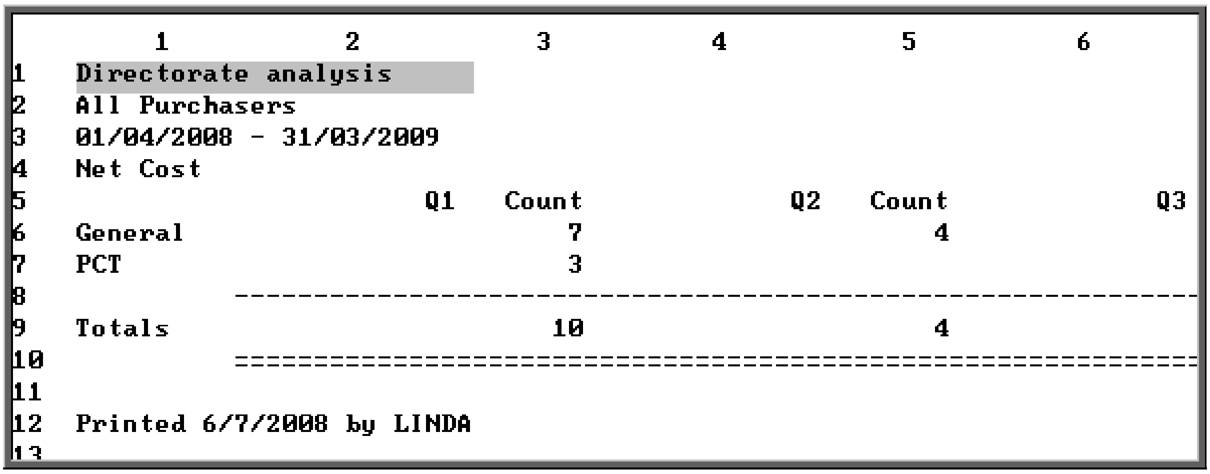
  select Type 1 to see the first quarter (1 April – 30 June) broken down by month

  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

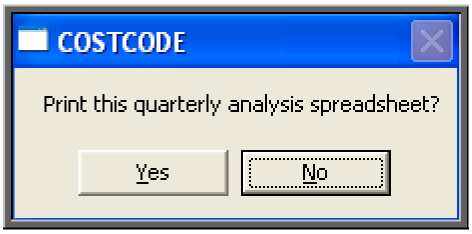
  select Type 4 to see the fourth quarter (1 January – 31 March) broken down by month

Below is an example produced by selecting Current year, Directorate, Net and Type Q

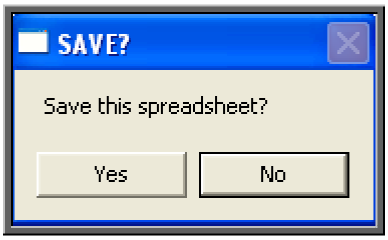


```
         1            2            3           4            5           6
1   Directorate analysis
2   All Purchasers
3   01/04/2008 - 31/03/2009
4   Net Cost
5                       Q1    Count                Q2    Count                Q3
6   General                       7                          4
7   PCT                           3
8             ----------------------------------------------------------------
9   Totals                       10                          4
10            ================================================================
11
12  Printed 6/7/2008 by LINDA
13
```

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.

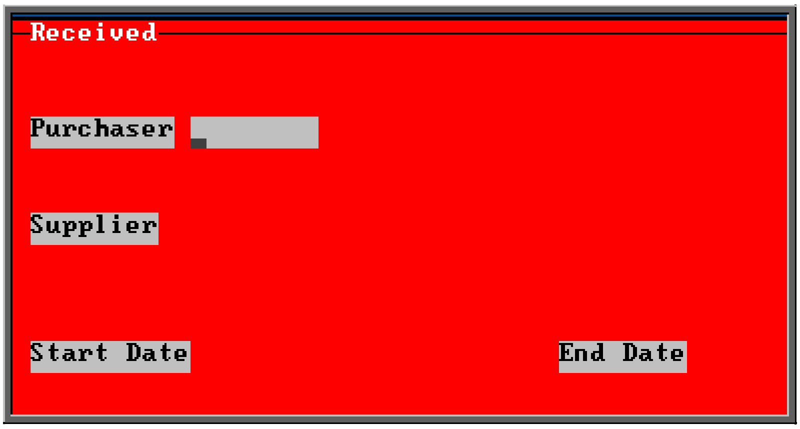
This will then be saved with that name within your personal directory of OPAS.

42. Financial report – Received

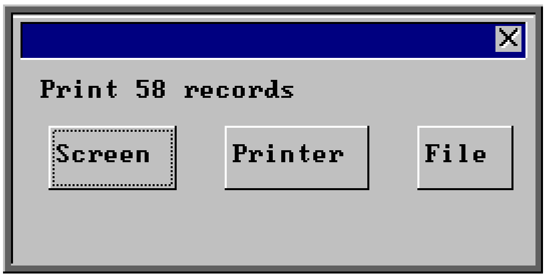
The Received report shows which orders have been received over a specific time period.

Menu: Reports – Financial – Batches – Received or

Menu: History – Reports – Batches – 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
- 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 Suppplier 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



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.

Below is an example of the Received report.

Received Items
01/09/2003 - 31/10/2003

Order No	Schedule Number	Description	VAT	Net	Gross
EXT00401	A135-80103BK	OPAL PODIABET SHOE 80-103 BLACK Sz 35	S	425.25	499.67
EXT00402	A135-80103BK	OPAL PODIABET 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

The report layout (received.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

43. Financial report – Reclaim VAT

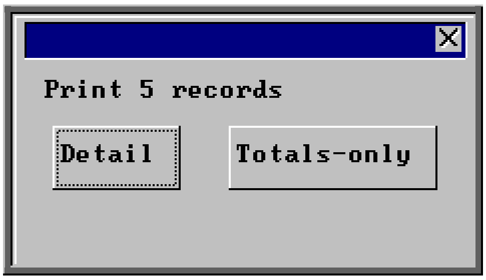
The Reclaim VAT report will show details of lines within orders where the VAT rate is R for Reclaim.

Menu: Reports – Financial – Batches – Reclaim VAT or

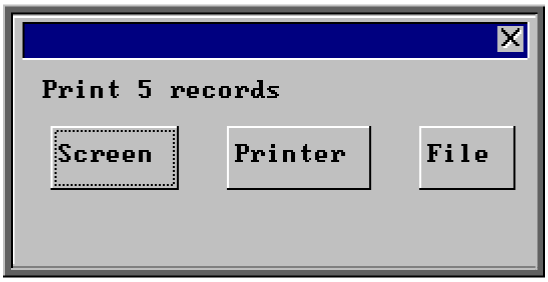
Menu: History – Reports – Batches – Reclaim VAT

- 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 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-only



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.

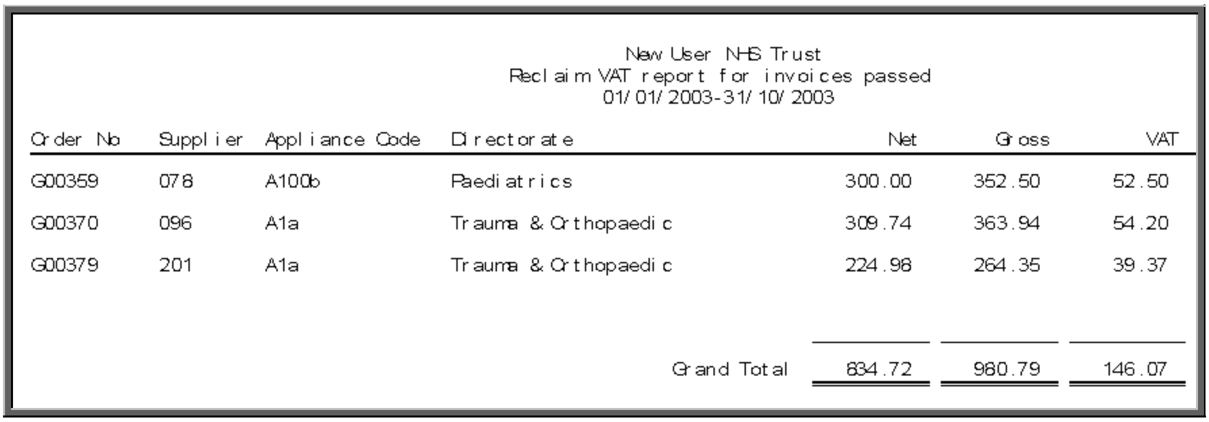
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Reclaim VAT report.



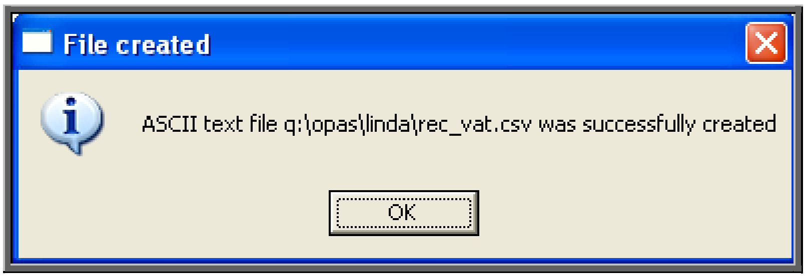
New User NHS Trust
Reclaim VAT report for invoices passed
01/01/2003-31/10/2003

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

The report layout (rec_vat.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



44. Financial report - 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.

Menu: Reports – Financial – Batches – Referrers or

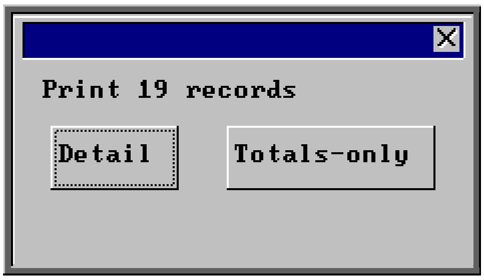
Menu: History – Reports – Batches – Referrers

- 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

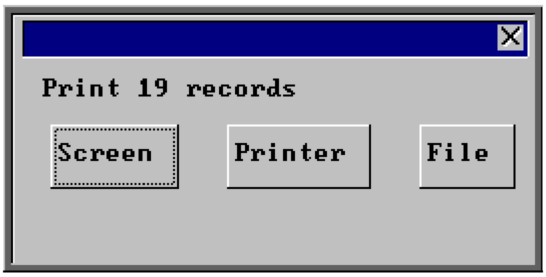
- select the Directorate required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Directorate field empty will result in all directorates being selected

- 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
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



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-only



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.

Below is an example of the **Referrers** report.

```
                              New User NHS Trust
                         Monthly Report To Purchaser :
                           01/01/2000 to 31/10/2003

Code        Hosp No     Patient Name           Order No            Gross

XYZ890      WCFNEOW     MASTER S BROWN         G00359             352.50
111111      TORUS004    MISS T SMITH           G00403/R1          338.94
                                                              ----------
                  Total for A N Other Paediatrics      Sum        691.44
                                                       Avg        345.72
                                                              ==========

                                                     Count  2


999999      G3355370    D EYRE                 23456               64.51
999999      01232195    J HAMILTON             1234567              2.17
XYZ890      G9202344    D FREAKE               G00351             239.37
ABC123      TEMP000010  MR M CRAVEN            G00370             363.94
ABC123      G0230753    R BENNET               G00377              64.08
ABC123      G123456     MISS J COLE            G00379             264.35
111111      12345QWERT  MR K BLOGGS            G00387              25.85
            Y
                                                              ----------
        Total for Mr Surgeon Trauma & Orthopaedic      Sum      1,024.27
                                                       Avg        146.32
                                                              ==========

                                                     Count  7
```

The report layout (bat_con.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

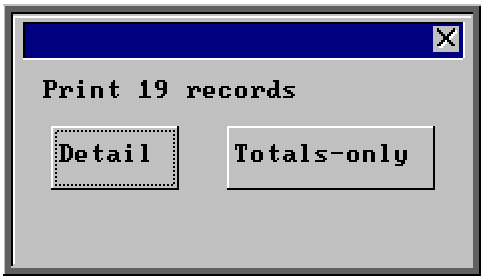
45. Financial report – Returns

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.

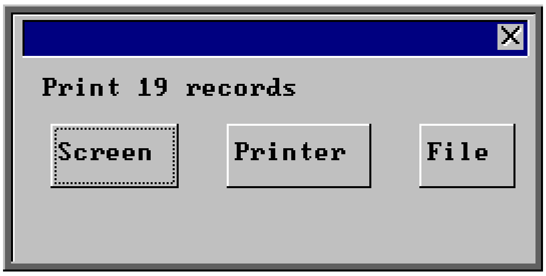
Menu: Reports – Financial – Batches – Returns or

Menu: History – Reports – Batches – Returns

- 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



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-only



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.

Below is an example of the Returns report.

Returns Report
01/04/2002 - 31/03/2003

Date	Patient	Order	Supp	Description	OrthosisCode	Reason for return
13/05/2002	G1340163	G00343	075		ABC123	Goods faulty
13/05/2002	XYZ0987654	G00357	012	Shoes	999999	To be finished off
05/06/2002	XYZ0987654	G00357	012	Shoes	999999	To be finished off
10/05/2002	ABC21234	W1234	012	SHOES	ABC123	Different type of shoe needed
01/05/2002	WOFNEOW	G00359	078	Shoes	XYZ890	Heel to be altered
10/05/2002	WOFNEOW	G00359	078	Shoes	XYZ890	Fastener to be adjusted
20/05/2002	WOFNEOW	G00359	078	Shoes	XYZ890	The left shoe is rubbing
22/04/2002	XYZ0987654	G00358	087	Shoes and adaptions	999999	Patient doesnt like them
13/05/2002	XYZ0987654	G00358	087	Shoes and adaptions	999999	Arrived too late
01/08/2002	G0825852	G00368	096	testing	ABC123	Wrong size delivered
21/02/2003	G0418296	PG00378	145	Shoes	ABC123	TESTING
28/02/2003	G0418296	PG00378	145	Shoes	ABC123	Wrong goods sent
13/05/2002	G3355370	23456	158	Bra	999999	Wrong size sent
Total for Purchaser : 1						
Count 13						
13/05/2002	XYZ0987654	00339	078	Custom shoes	ABC123	Sole to be built up
Total for Purchaser : 54						
Count 1						

The report layout (bat_ret.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

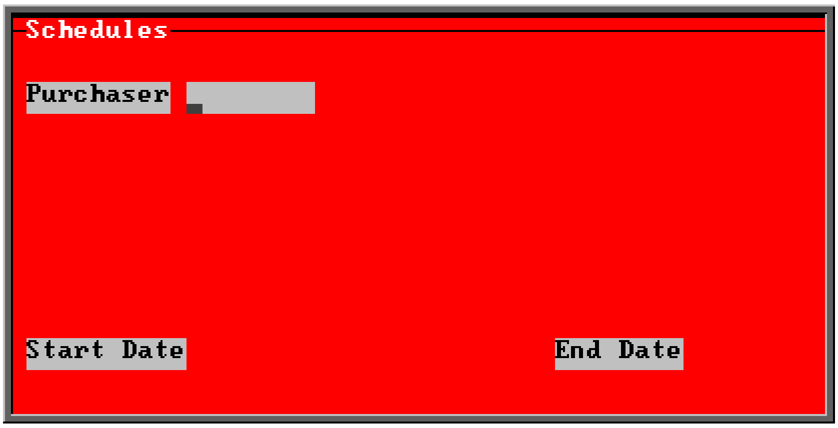
A comma separated variable file will be created called bat_ret.csv. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

46. Financial report – Schedules

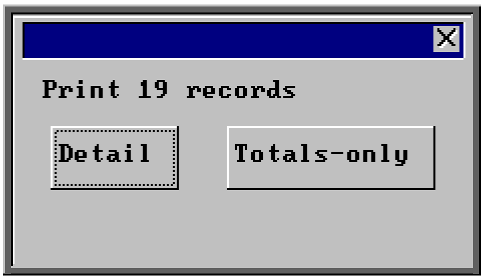
The Schedules report gives detail of appliances ordered by schedule number. If an item is entered on an order without a schedule number it will not be included in this report.

Menu: Reports – Financial – Batches – Schedules or

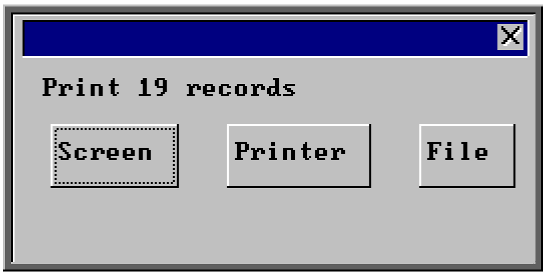
Menu: History – Reports – Batches – Schedules



- 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-only



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.

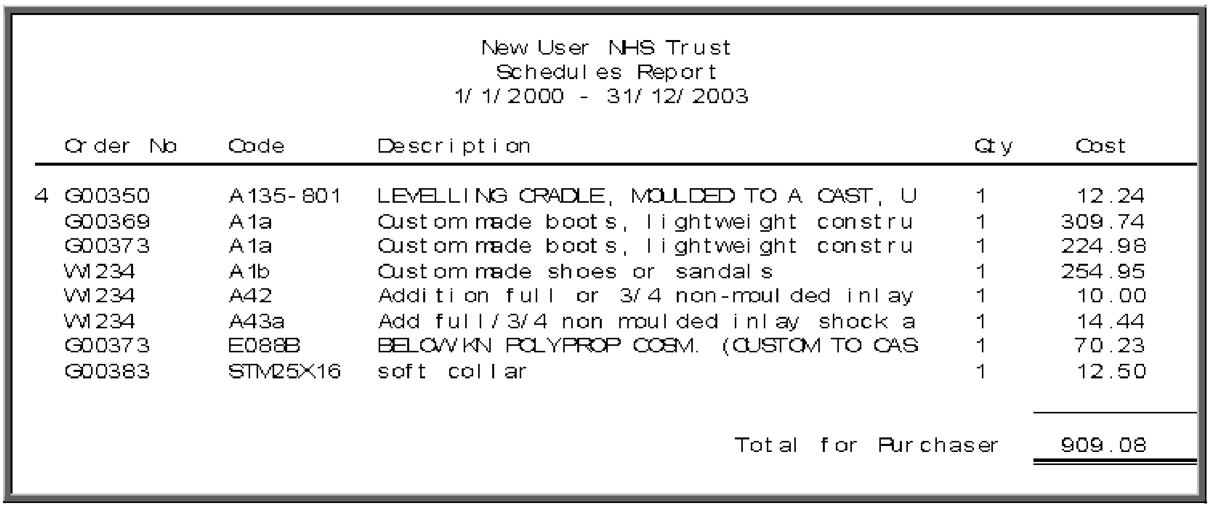
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Schedules report.



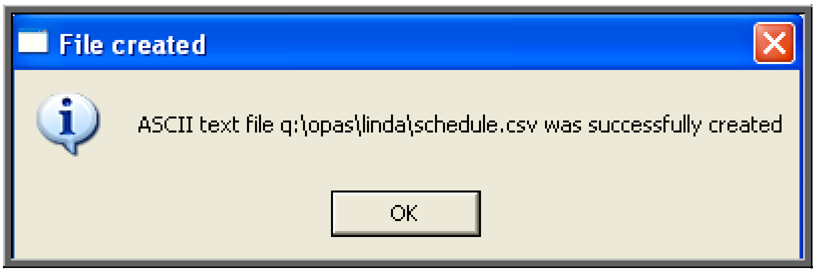
New User NHS Trust
Schedules Report
1/1/2000 - 31/12/2003

	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
	VW1234	A1b	Custom made shoes or sandals	1	254.95
	VW1234	A42	Addition full or 3/4 non-moulded inlay	1	10.00
	VW1234	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

The report layout (schedule.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

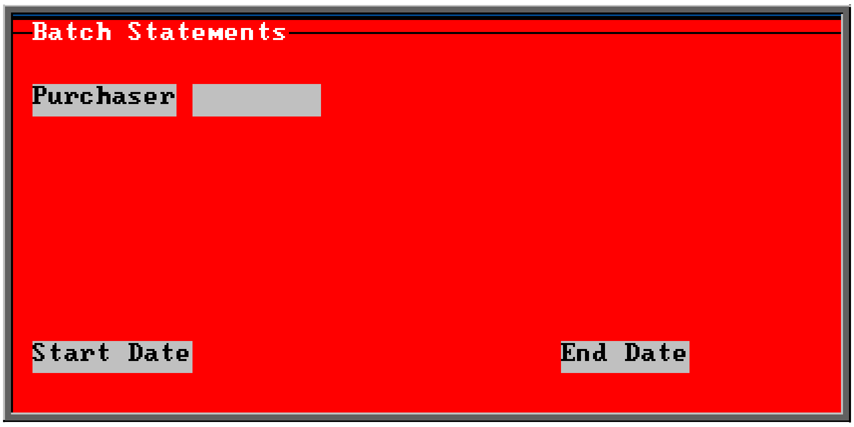


47. Financial report – Statements

The Statements report shows purchase invoices raised within a specific period of time and also offers the option to print those invoices.

Menu: Reports – Financial – Batches – Statements or

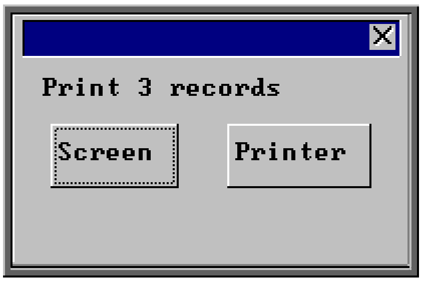
Menu: History – Reports – Batches – Statements



- 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 or to be printed

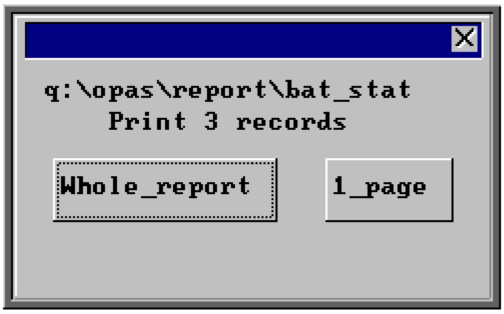
Screen

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, Printer or File. Make another selection or press **Esc** again to return to the menu.

Printer

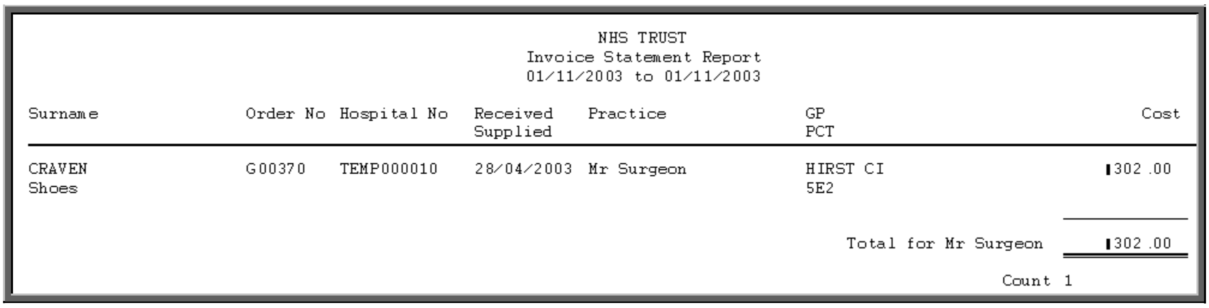


You are given the option to print the whole report, or to reprint one page again.

If 1_page is selected, you will be asked at the bottom of the screen for the page number. If the Page number: is left blank, the whole report will be printed.

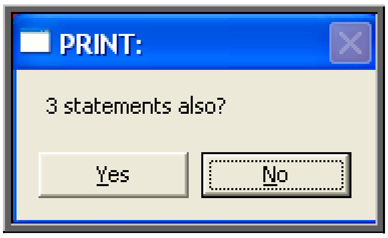
The report will be sent to the printer. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

Below is an example of the Statements report.


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	302.00
					Total for Mr Surgeon	302.00
					Count 1	

You then have the option to print the invoices listed on the report if required.



48. Financial report – 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.

Menu: Reports – Financial – Batches – Supplier Spend or

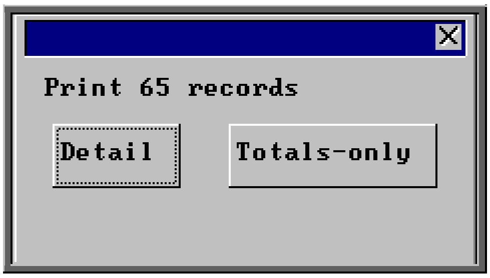
Menu: History – Reports – Batches – Supplier Spend

- 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

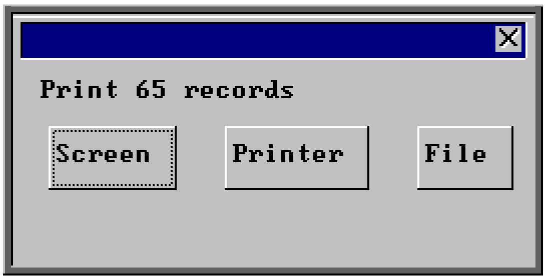
- select the Supplier required from the pop-up list. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected

- 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
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.

Select how you want the information to be analysed i.e. by Orthosis_codes or Directorate



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-only



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.

Below is an example of the Supplier Spend report selecting Orthosis_codes.

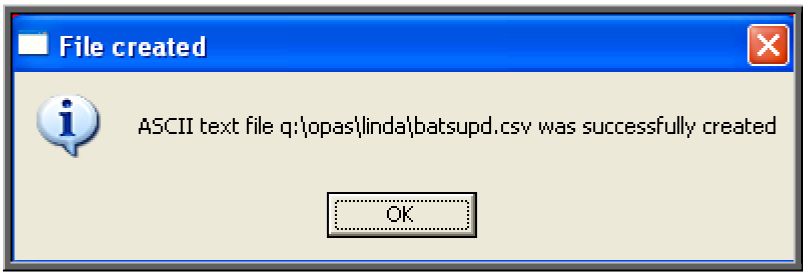
New User NHS Trust
Amount Spent by Cost Code
01/01/2000 to 31/12/2003

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

The report layouts (batsupc.dfr and batsupd,dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called batsupc.csv when analysed by Orthosis_code, and batsupd.csv when analysed by Directorate. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

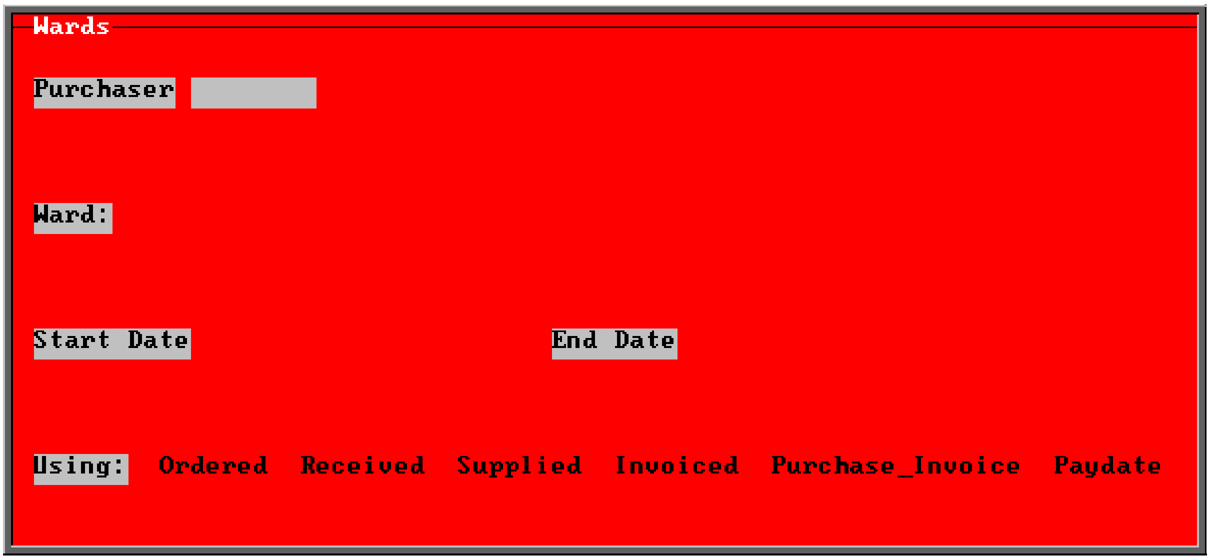


49. Financial report – Wards

This report interrogates orders by the information held in the *Ward* field.

Menu: Reports – Financial – Batches – Wards or

Menu: History – Reports – Batches – Wards



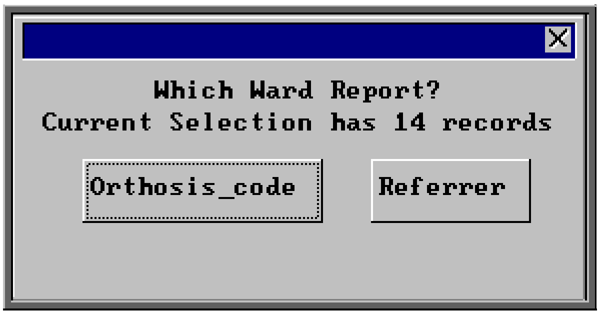
- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- 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

- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



Select how you want the information to be analysed i.e. by Orthosis code or Referrrer

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-only

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.

Below is an example of the Ward report selecting Orthosis_codes.

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		14.38
G00358			A N Other		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

The report layouts (bat_ward.dfr and bat_ward2.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

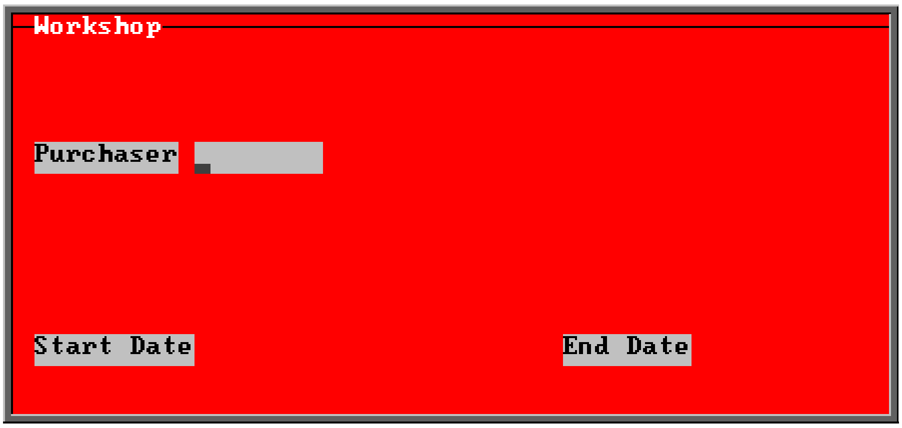
A comma separated variable file will be created called bat_ward.csv when analysed by Orthosis Code and bat_war2.csv if analysed by Referrer. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

50. Financial report – Workshop

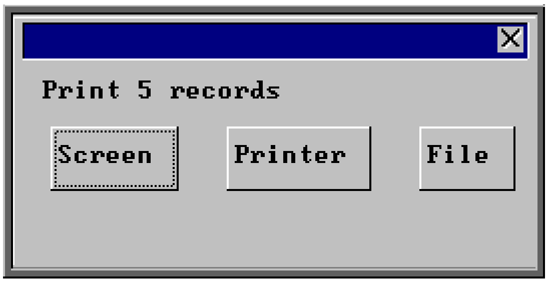
This report lists those orders that have been supplied from the Workshop (i.e. supplier 999) and shows how much time has been spent on them. (Supplier 999 is an NSI supplier set up as an internal supplier for those hospitals that have their own workshop.)

Menu: Reports – Financial – Batches – Workshop or

Menu: History – Reports – Batches – Workshop



- 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

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.

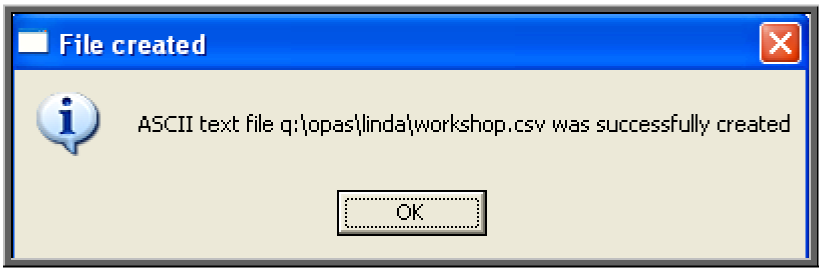
Below is an example of the Workshop report.

```
                    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:
-----------------------------------------------------------------------------
12345QWERTY    G00387      04/03/2003   BERT
01232195       1234567     13/05/2002
                                                                ________
                                                 Total for BERT        0
                                                                ========
                                                          Count 2


ABC21234       W1234       13/05/2002   FRED
XYZ0987654     G00358      29/05/2002
G9202344       G00351      13/05/2002
                                                                ________
                                                 Total for FRED        0
                                                                ========
                                                          Count 3
```

The report layout (workshop.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

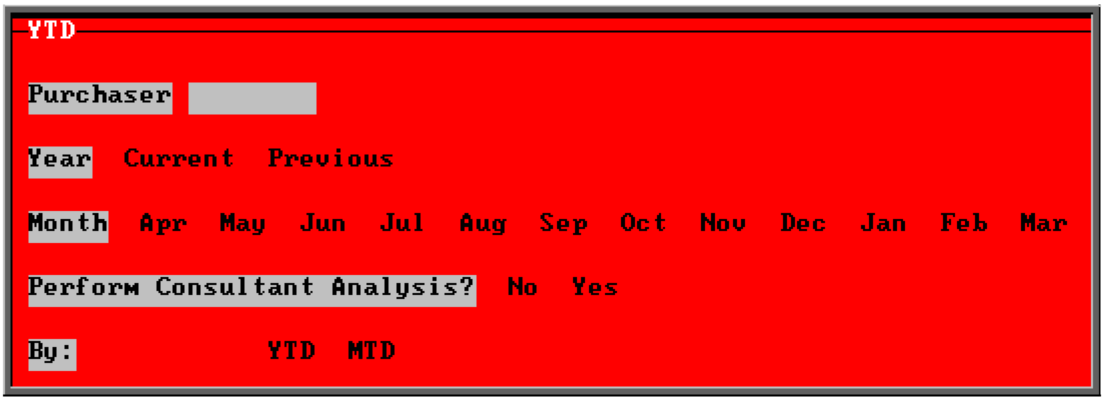


51. Financial report – YTD (Year to Date)

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.

Menu: Reports – Financial – Batches – YTD or

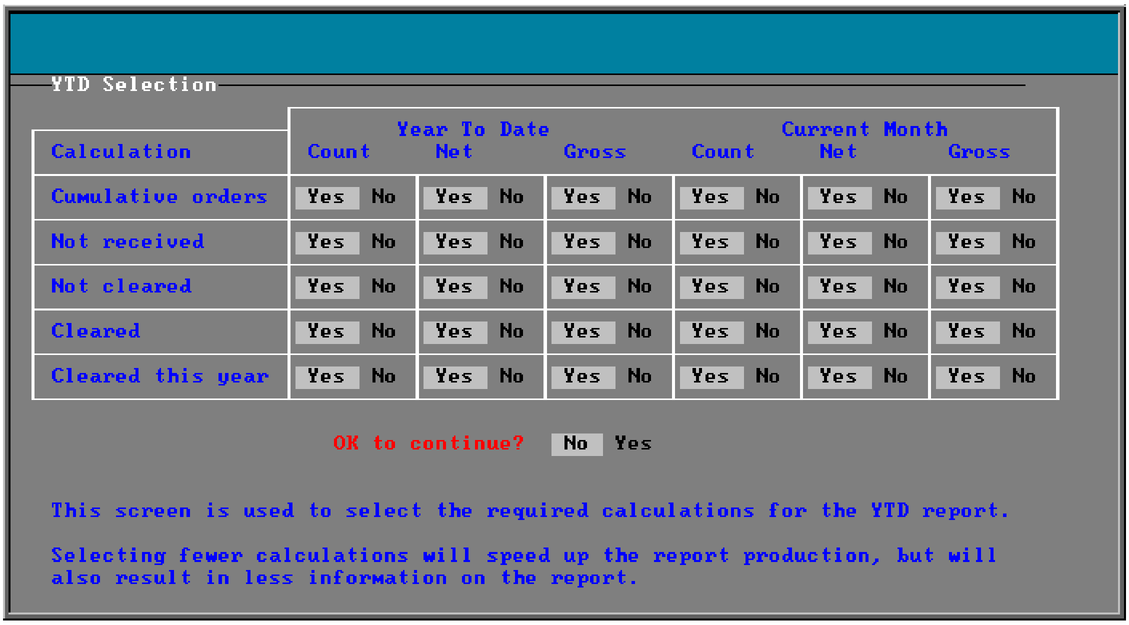
Menu: History – Reports – Batches – YTD



- 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

- select YTD (Year to Date) or MTD (Month to Date)

You will then be taken to the following selection screen:



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 <u>not</u> 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

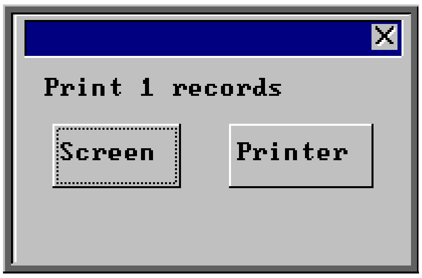
will show the number of orders, total net amount and total gross amount for orders where the goods and the invoice have been received, for the year to date and the current month, if selection is left at Yes.

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.



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, 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.

Below are examples of the YTD report.

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).

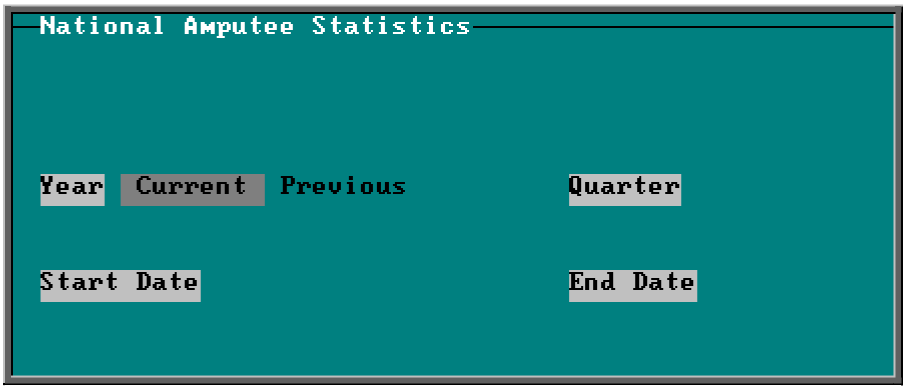
52. Patients reports (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 6 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.

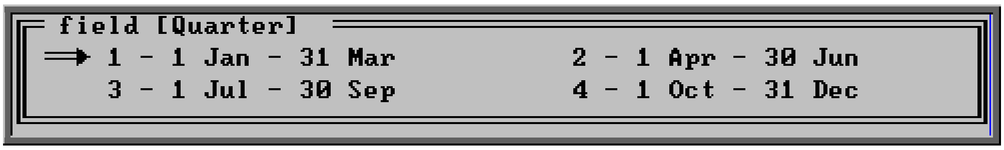
53. Patients report – Amputee

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.

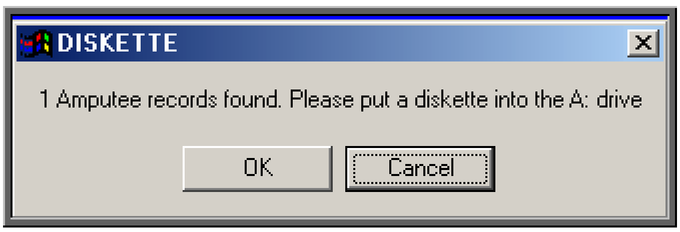
Menu: Reports – Patients – Amputee



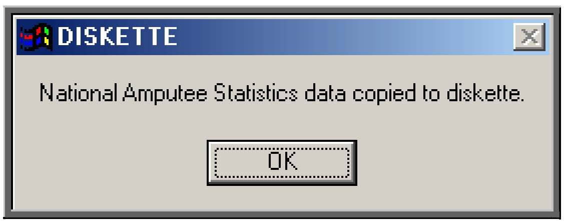
- select Current or Previous Year (the year runs from Jan – Dec)
- select the appropriate Quarter from the pop-up list



- the Start and End dates will fill automatically, based on the Year and Quarter selected
- press **Ctrl-Enter** to continue



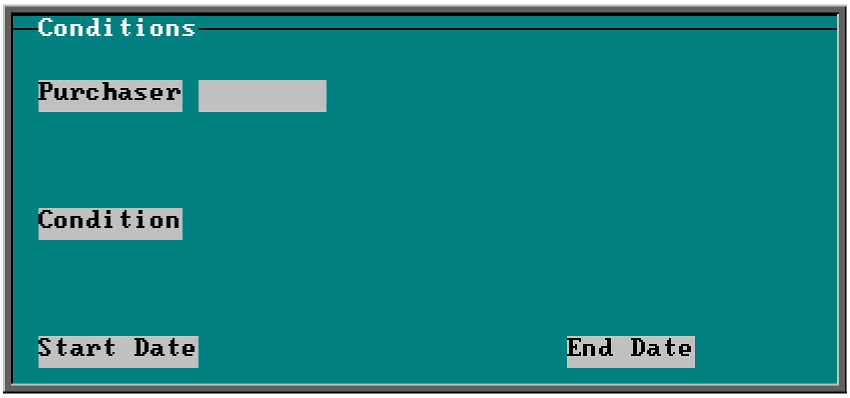
- place a disk in your computer and click on OK
- you will be informed when all the data has been transferred to the disk



54. Patients report –Conditions

This report provides a breakdown of patients marked with a specific medical condition.

Menu: Reports – Patients – Conditions



- 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 Condition required from the pop-up list to find all those patients with that medical condition. Alternatively press Esc to make the pop-up list disappear without making a selection. Leaving the Condition field empty will result in all patients registered in the period being selected regardless of a whether the patient has a condition

- 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-only

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.

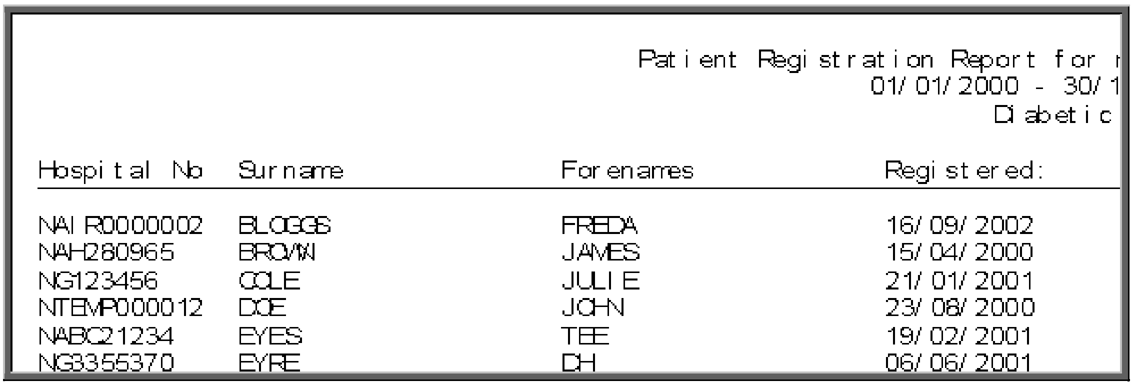
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Ward report selecting Orthosis_codes.



Patient Registration Report for r
01/01/2000 - 30/1
Diabetic

Hospital No	Surname	Forenames	Registered:
NAIR0000002	BLOGGS	FREDA	16/09/2002
NAH280965	BROWN	JAMES	15/04/2000
NG123456	COLE	JULIE	21/01/2001
NTEMP000012	DOE	JOHN	23/08/2000
NABC21234	EYES	TEE	19/02/2001
NG3355370	EYRE	DH	06/06/2001

The report layout (condit.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called condit.csv when analysed by Orthosis Code and bat_war2.csv if analysed by Referrer. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

55. Patients report – 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.

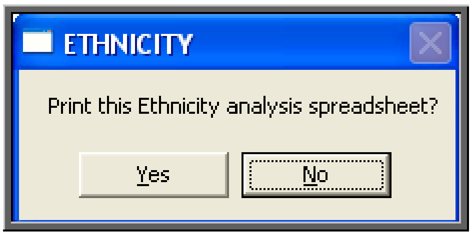
Menu: Reports – Patients – Ethnicity

- 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	01/01/2000 - 06/07/2008	
4		
5	Ethnicity Code	Count
6	------------------------------	------------------------------
7		6
8	0	1
9	9	1
10	A	8,965
11	H	9
12	R	14
13	------------------------------	------------------------------
14		8,996.00
15		=========================

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.

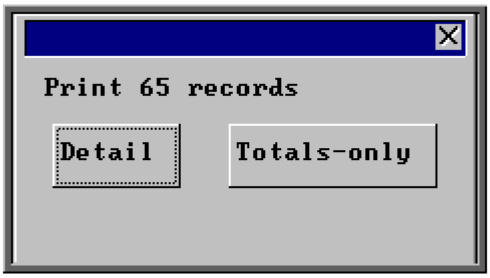
This will then be saved with that name within your personal directory of OPAS.

56. Patients report – Registered

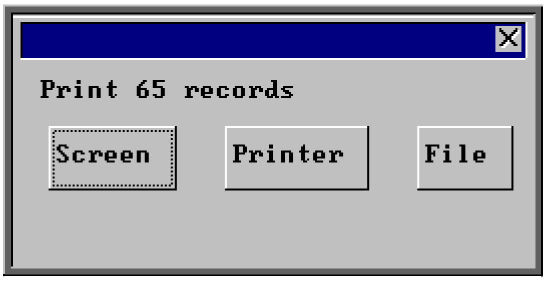
The Registered report gives details of patients registered (i.e. entered onto OPAS) within a specific time period.

Menu: Reports – Patients – Registered

- 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-only



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.

Below is an example of the Registered report.

Purchaser	Directorate	Hospital No	Surname	Registered:	GPref
		KL123456	VALE	29/04/2002	
		1134939	WATTERSON	08/10/2002	E629
		FRESC123	WHOSANE	05/11/2002	
Directorate Total					
	Count 3				
	PCT	G3221217	JONES	15/01/2001	G9310517
		G3373080	FREDRICK	25/11/2002	G3399420
		G9809404	HALFHIDE	25/11/2002	G3399420
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	

The report layout (bat_ref.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

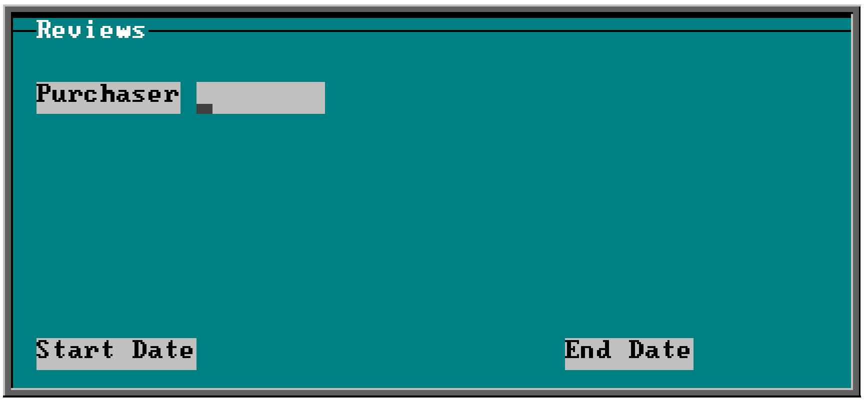
File

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

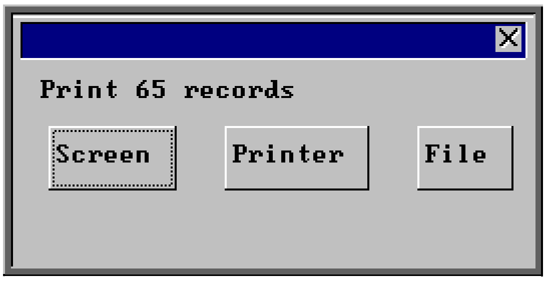
57. Patient report – Reviews

This report will interrogate the *Review* field on the Patient screen to see who is due a review.

Menu: Reports – Patients – Reviews



- 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

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.

Below is an example of the **Reviews** report.

Patient Reviews
01/01/2008 - 31/01/2008

Review	Hospital No	Surname	Forenames	D O B	Sex
04/01/2008	NTEMP000007	MCMANUS	LIBBY	11/11/1967	F
15/01/2008	N121276QW	DONOHOE	LINDA	12/12/1976	F
16/01/2008	NTEMP000012	DOE	JOHN	05/11/1947	M
22/01/2008	NF381231	HEAVER	SYDNEY	25/01/1931	M

The report layout (reviews.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

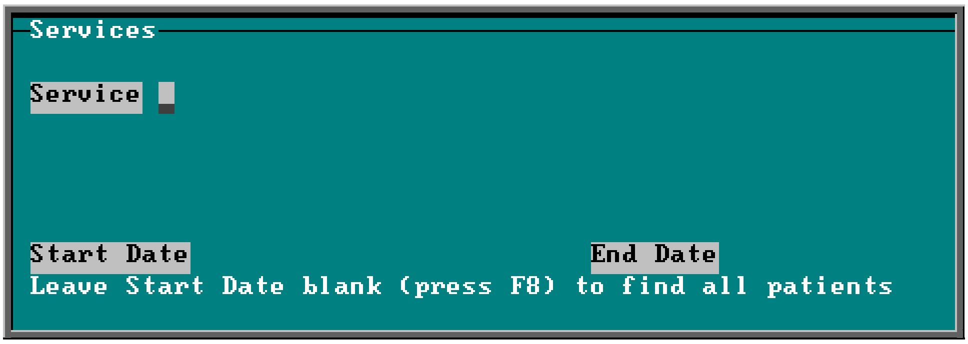
File

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

58. Patient report – Services

This report will interrogate patients using the *Service* field on the **Patient** screen.

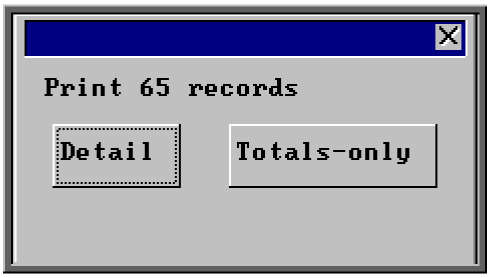
Menu: Reports – Patients – Services



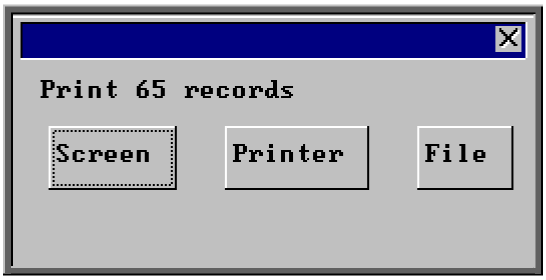
- select the Service required from the pop-up list.

- enter the Start date of the required date range in the format DD MM YYYY, or leave blank to find all patients assigned to the service selected

- 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-only



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.

Below is an example of the **Services** report.

Patients Registered using Service:- O

Hospital No	Title	Forenames	Surname
N12345QWERTY	MR	KELVIN	BLOGGS
NTORUS007	MRS	ELIZABETH	BUTCHER
TMP000002	MR		MITH
TORUS44	MISS	TESSA	SMITH
448864	MISS	LISA	TARBUCK

The report layout (bat_serv.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

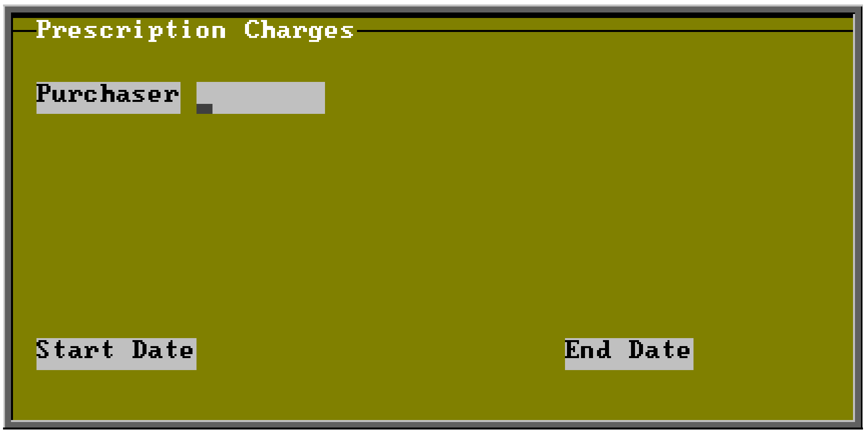
59. Prescriptions reports (Batches)

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.

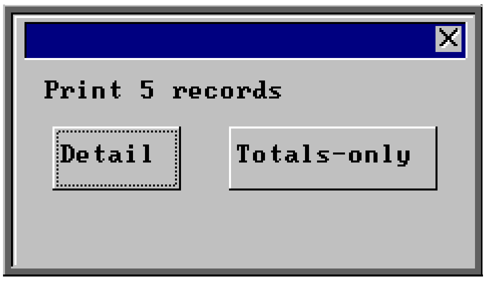
60. Prescriptions report – Charges

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.

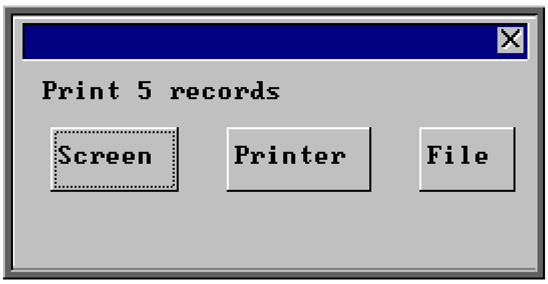
Menu: Reports – Prescriptions – Charges



- 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-only



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.

Below is an example of the Charges report.

Prescription Charges Collected
01/01/2001 - 31/12/2002

Patient Name	Hospital No	Order No	Orthosis Code	Date of Order	Amount :
DH EYRE	G3355370	23456	999999	05/06/2001	12.10
JEANETTE HAMILTON	01232195	1234567		11/07/2001	12.10
MISS TESSA SMITH	TORUB004	G00373		14/08/2002	35.20
				Total for Code	59.40

The report layout (bat_pres.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

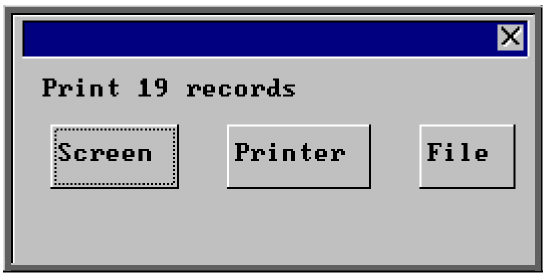
61. Prescriptions report – Expired

This report will provide a list of prescriptions that have expired between the chosen dates.

Menu: Reports – Prescriptions – Expired

- 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-only



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.

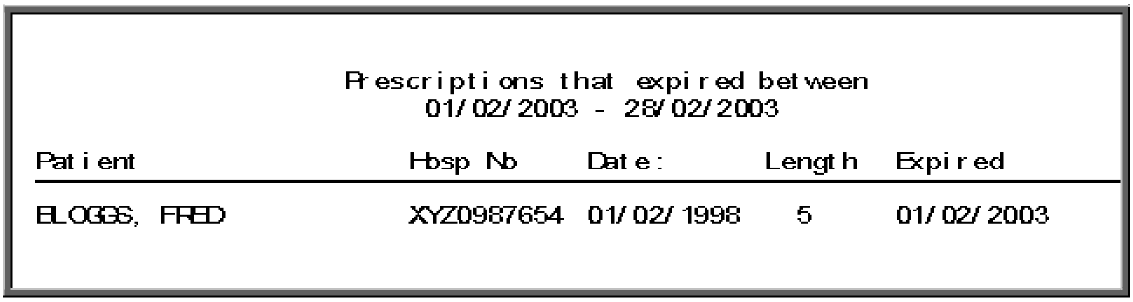
If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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.

Below is an example of the Expired report.



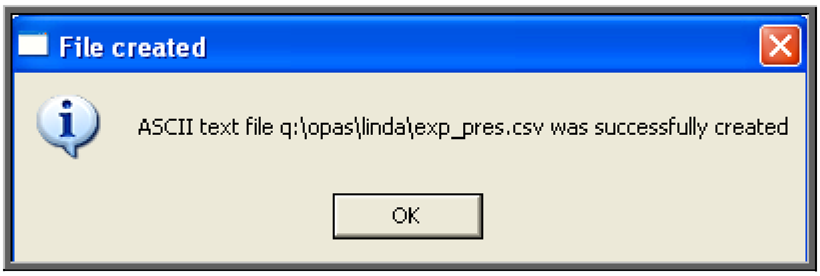
Prescriptions that expired between
01/02/2003 - 28/02/2003

Patient	Hosp No	Date:	Length	Expired
BLOGGS, FRED	XYZ0987654	01/02/1998	5	01/02/2003

The report layout (exp_pres.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

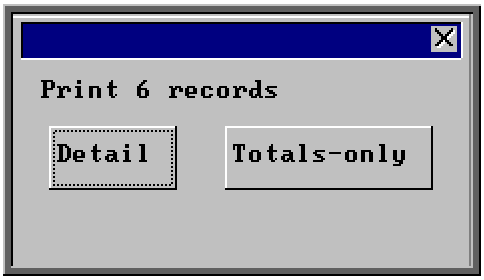


62. Prescriptions report – New

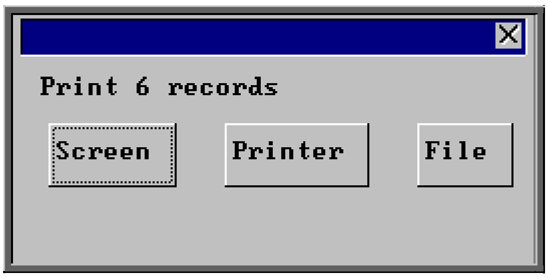
This report will provide a list of new prescriptions that have been entered between the chosen dates.

Menu: Reports – Prescriptions – New

- 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-only



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.

Below is an example of the New report.

Prescriptions added to system between
01/01/2003 - 31/03/2003

Consultant	Patient	Hosp No	Length
Mr Surgeon, Trauma & Orthopaedic	BLOWED, ALBY	TMP000025	1
Mr Surgeon, Trauma & Orthopaedic	WHOSANE, NASSER	PRESC123	1
Mr Surgeon, Trauma & Orthopaedic	WHOSANE, NASSER	PRESC123	1
Mr Surgeon, Trauma & Orthopaedic	WHOSANE, NASSER	PRESC123	1
Mr Surgeon, Trauma & Orthopaedic	SMITH, TESSA	TORUB004	1
Mr Surgeon, Trauma & Orthopaedic	RAWSON, LINDA	LKP12345	3
	Trauma & Orthopaedic Cnt	6	

The report layout (preslist.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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

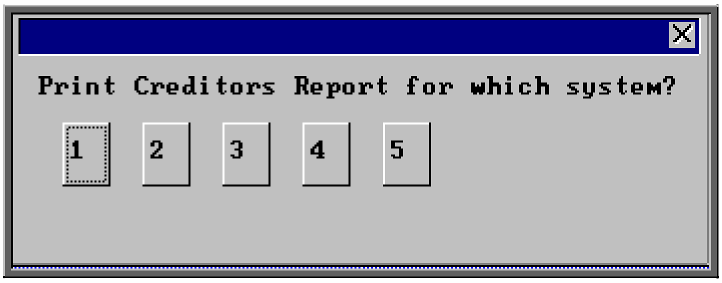
63. Stock Control (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 4 different batch reports analysing stock control 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.

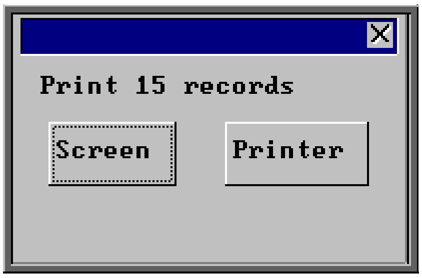
64. Stock Control – Creditors

This has the same purpose as the financial creditors report, in that it is finding those orders that have not been invoiced yet, but this report is looking at your stock purchase orders.

Menu: Reports – Stock – Creditors



Select which stock system the report is to be run for.



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, 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.

Below is an example of the Creditors report.

Stock Purchases System 1
Orders Received but not invoiced
Printed 02/07/2008

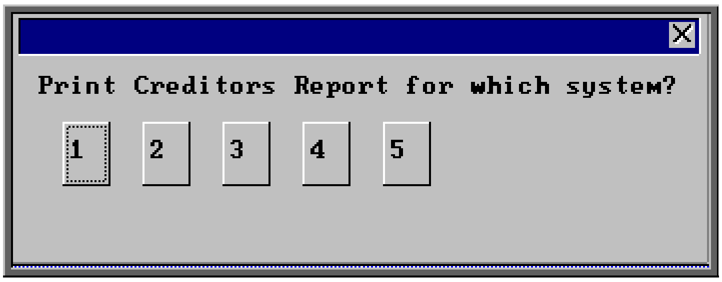
Ordered	Received	Order No	Supplier	Net :	VAT:	Grand:
19/05/1998	25/08/2000	ST0011	012	28.70	5.02	33.72
06/08/1998	25/08/2000	ST0012	012	57.40	10.05	67.45
26/10/1999	25/08/2000	ST0013	012	20.00	3.50	23.50
25/08/2000	25/08/2000	ST0014	012	41.00	7.18	48.18
25/08/2000	25/08/2000	ST0015	012	20.50	3.59	24.09
25/08/2000	25/08/2000	ST0016	012	20.50	3.59	24.09
25/08/2000	11/10/2000	ST0017	012	61.50	10.76	72.26
10/10/2000	10/10/2000	ST0019	012	790.48	138.33	928.81
06/07/2004	Part only	ST0021	012	823.20	144.06	967.26
13/01/2008	13/01/2008	ST0024	001	12.34	2.16	14.50
13/01/2008	13/01/2008	ST0025	001	12.34	2.16	14.50
13/01/2008	13/01/2008	ST0026	001	12.34	2.16	14.50
13/01/2008	20/04/2008	ST0027	001	61.70	10.80	72.50
06/02/2008	Part only	ST00191	012	340.20	59.54	399.74
19/04/2008	02/07/2008	ST0028	012	170.10	29.77	199.87
			Grand Total	2,472.30	432.66	2,904.96

The report layout (stcredit.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

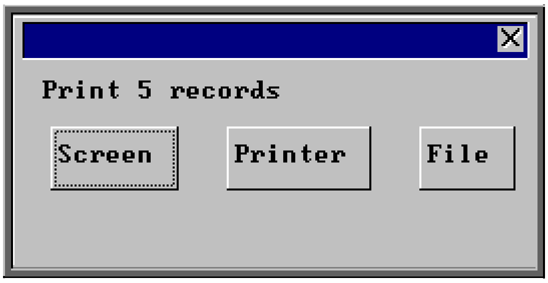
65. Stock Control –Lowstock

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.

Menu: Reports – Stock – Low Stock



Select which stock system the report is to be run for.



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.

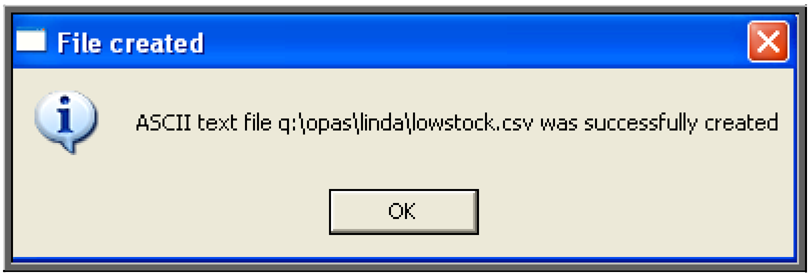
Below is an example of the **Low Stock** report.

```
Stock (1) at or below minimum level for:
001 Arden Orthotics

                           Lowstock Report
                            Stock System 1

Stock No:    Schedule:    Stock:  Minimum:  Maximum:  Reorder:  On Order
Description:
-------------------------------------------------------------------------
TTT111       A1a             -1        1         1         1
```

The report layout (lowstock.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

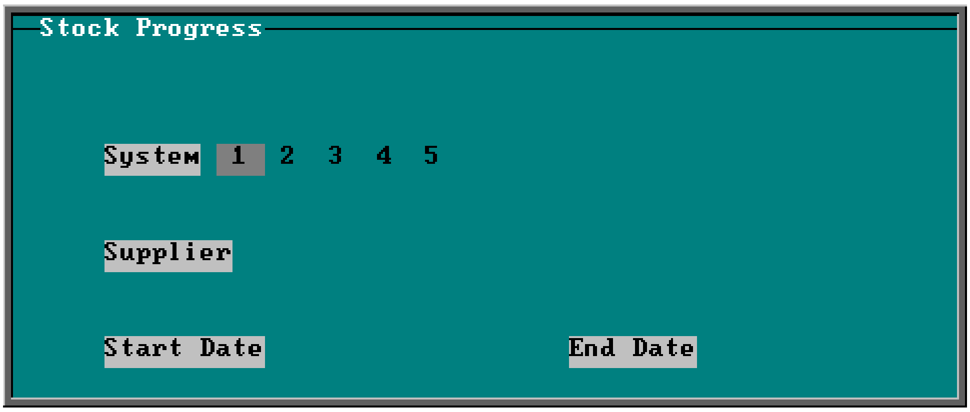
A comma separated variable file will be created called lowstock.csv. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



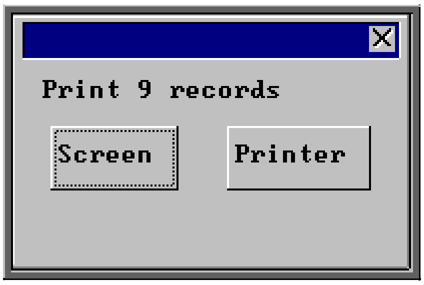
66. Stock Control –Progress

This report interrogates your Stock Purchase Orders and finds those that have not yet been received.

Menu: **Reports – Stock – Progress**

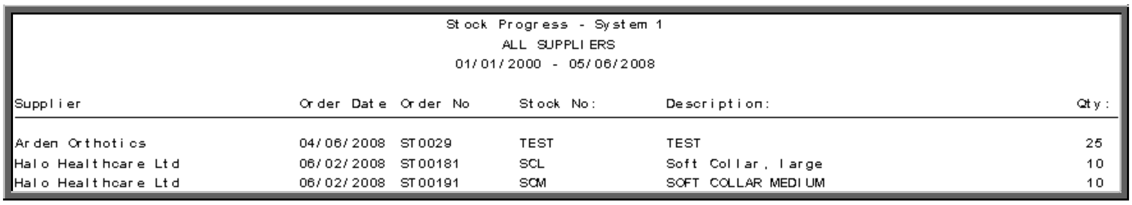


- select the Stock System required
- select the Supplier required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected
- enter the Start date of the required date range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



Once the data has been found you have the option to see the report on screen or to be printed

Below is an example of the Progress report.



Stock Progress - System 1
ALL SUPPLIERS
01/01/2000 - 05/06/2008

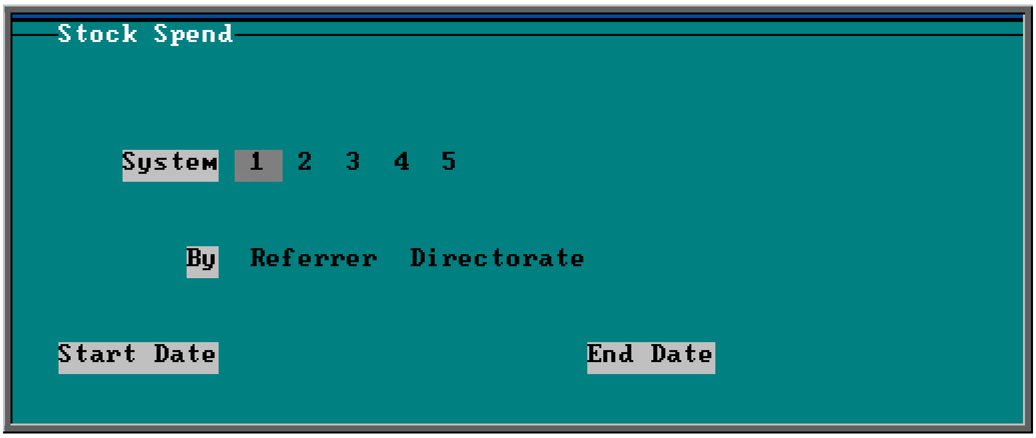
Supplier	Order Date	Order No	Stock No:	Description:	Qty:
Arden Orthotics	04/06/2008	ST0029	TEST	TEST	25
Halo Healthcare Ltd	06/02/2008	ST00181	SCL	Soft Collar, large	10
Halo Healthcare Ltd	06/02/2008	ST00191	SCM	SOFT COLLAR MEDIUM	10

The report layout (st_prog.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

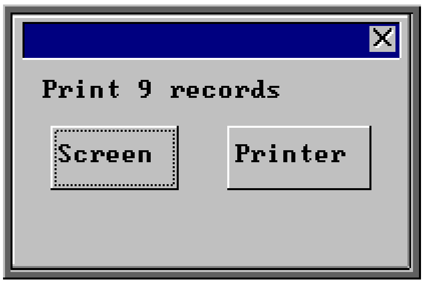
67. Stock Control – Spend

This report lists items that have been supplied.

Menu: Reports – Stock – Spend



- select the Stock System required
- select whether the report should be analysed by Referrer or Direcorate
- 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

Below is an example of the Spend report selecting Referrer.

Stock Spend Report - Stock System 1
02/01/2008 - 31/01/2008
By Referrer

Referrer	Date:	Patient	Stock No:	Price
	13/01/2008	BFTRDSX1457	TEST	12.34
	13/01/2008	NG0325118	TEST	12.34
			Total	24.68
Mr Surgeon	10/01/2008	NX232323	TEST	12.34
	13/01/2008	NG0325228	TEST	12.34
			Total	24.68
Direct Access GP	10/01/2008		STM25X16A	12.34
	10/01/2008		TEST	12.34
	13/01/2008	NS7654321	TEST	12.34
			Total	37.02
			Grand Total	86.38

The report layouts (st_sp_co.dfr and st_tr_di.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

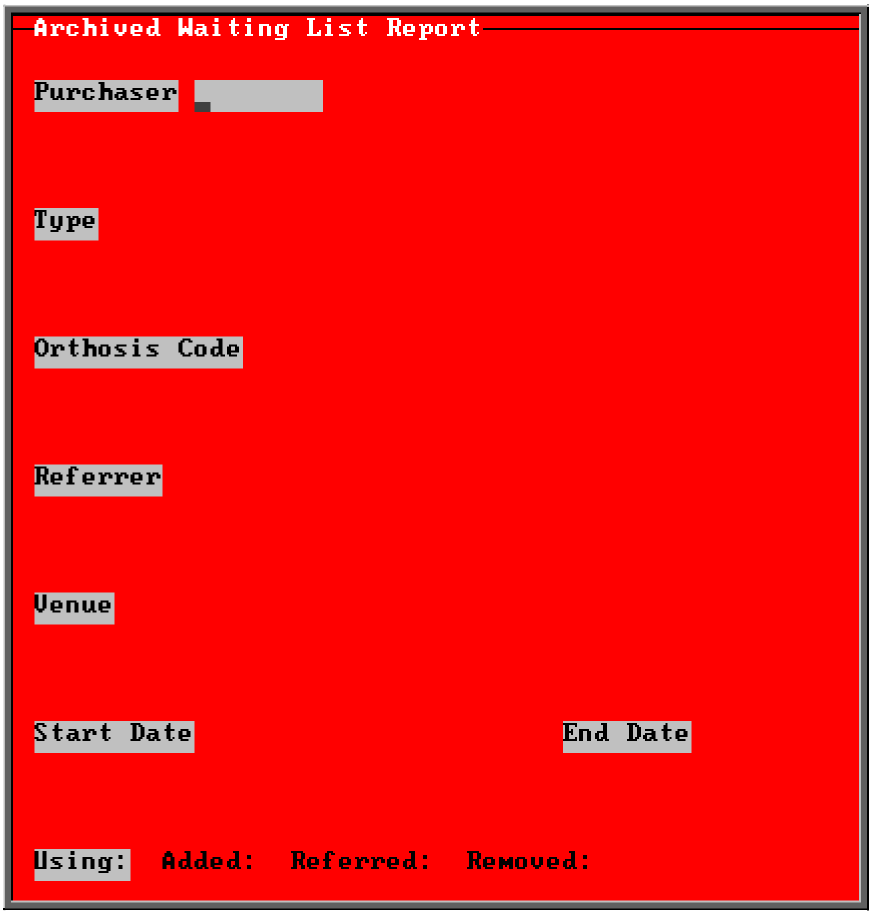
68. Waiting List (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 2 different batch reports analysing waiting list 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.

69. Waiting List – Archived

This report interrogates the archived waiting list. The archived waiting list contains those patients that have been removed from the current waiting list (this can be because they have been given/attended/DNA'd an appointment or have been manually deleted from the list) and archived (see Waiting List - Note 9. Archiving the Waiting List).

Menu: Reports – Waiting List – 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 the Type required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Type field empty will result in all types being selected

- select the Orthosis Code required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Orthosis Code field empty will result in all orthosis codes being selected

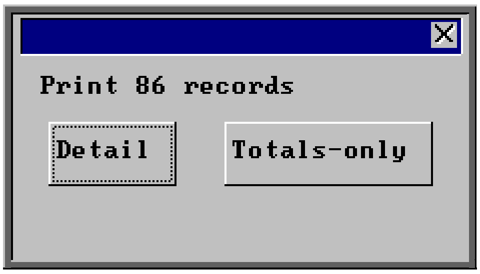
- select the Referrer required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Referrer field empty will result in all referrers being selected

- select the Venue required 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

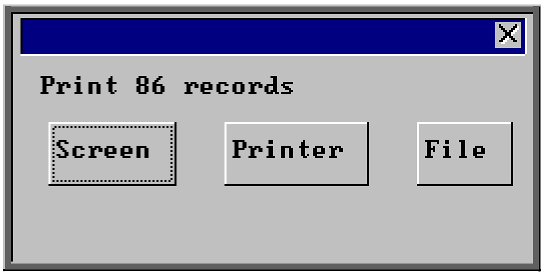
- enter the Start date of the required date range in the format DD MM YYYY

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

- select whether the date range entered should look at the Added:, Referred: or Removed: date on the waiting list screen



You will be shown how many waiting list entries OPAS has found and ask if you want to see the information in Detail i.e. a line for each waiting list entry or just Totals-only



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.

Below is an example of an Archived report in Detail.

All Purchasers
Added: 01/05/2008 - 26/06/2008

Hospital No	Surname	Added:	Removed:	Days:	Reason:
TORUS44	SMITH	02/05/2008	03/06/2008	32	Attended Appointment
NTEMP000012	DOE	16/05/2008	27/05/2008	11	Attended Assessment Appointment
NG01089222	ASHER	25/05/2008	25/06/2008	31	Appointed
NF381231	HEAVER	27/05/2008	02/06/2008	6	Appointment made
NG0416854	DOWNEY	28/05/2008	29/05/2008	1	Attended Appointment
TORUS44	SMITH	04/06/2008	19/06/2008	15	DNA

Below is an example of an Archived report in Totals_only.

Hospital No	Surname	Added:	Removed:	Days:
			Average for Purhcaser	198
			Count	53
			Average for Purhcaser NHS TRUST	16
			Count	32
			Average for Purhcaser GP Fundholder	2
			Count	1
			Grand Total Average	128
			Count	86

The report layout (wl_arch.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

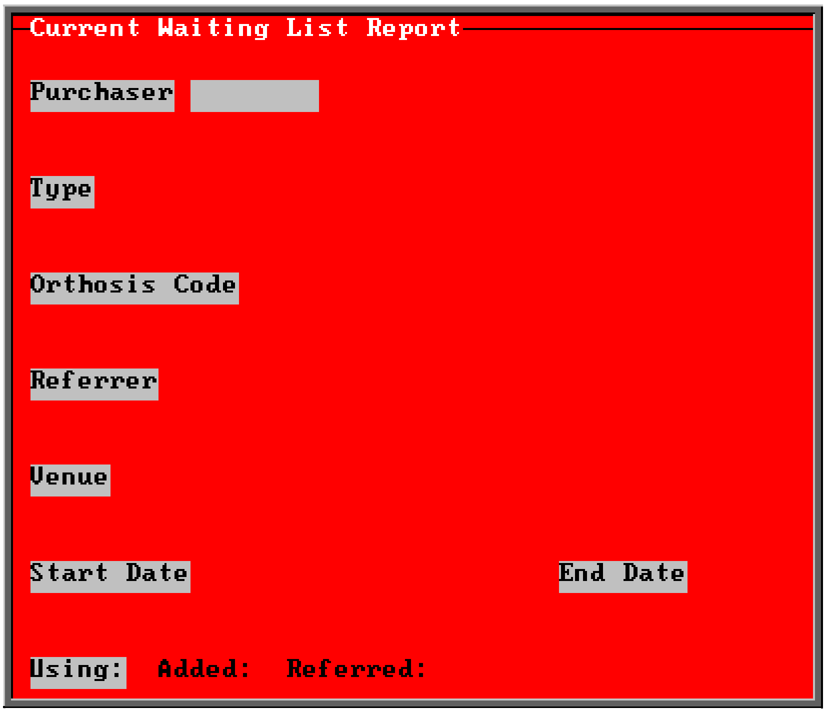
File

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

70. Waiting List – Current

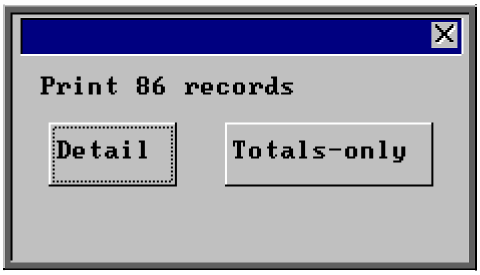
This report interrogates your current waiting list i.e. all those patients still on the waiting list.

Menu: Reports – Waiting List – Current

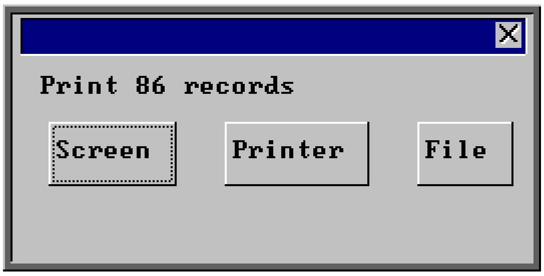


- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected

- select the Type required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Type field empty will result in all types being selected
- select the Orthosis Code required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Orthosis Code field empty will result in all orthosis codes being selected
- 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
- select the Venue required 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
- select whether the date range entered should look at the Added: or Referred: date on the waiting list screen



You will be shown how many waiting list entries OPAS has found and ask if you want to see the information in detail i.e. a line for each waiting list entry or just Totals-only



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.

Below is an example of a Current report in Detail.

NHS TRUST
Added: 01/01/2000 - 26/06/2008

	Hospital No	Surname	Added:	Priority:	Days:	Description:
1	NTCRUS0077	SELBY	08/04/2008	395	79	Custom Footwear
1	NG0816485	HABIBIS	13/02/2008	134	134	Custom Footwear
1	NG0417666	DAVISON	03/06/2008	115	23	Custom Footwear
1	NG0230557	BEGG	05/06/2008	105	21	Custom Footwear
1	TMP000023	LARGE	05/06/2008	105	21	Custom Footwear
1	NAB123456	SHIEL	06/06/2008	100	20	Custom Footwear
1	NAH280965	BROWN	06/06/2008	100	20	Custom Footwear

Below is an example of a Current report in Totals_only.

tal No Surname Added: Priority: Days:

Average for Purchaser NHS TRUST 33
Count 23

Average for Purchaser GP Fundholder 48
Count 2

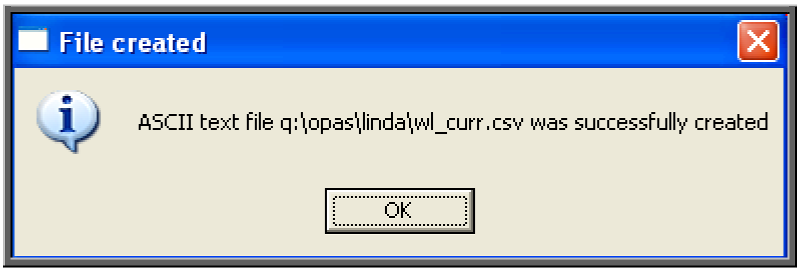
Average for Purchaser Primary Care Group 67
Count 1

Grand Total Averages 35
Count 26

The report layout (wl_curr.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



Utilities

34. Portable

35. Training

36. Upgrade

37. Users

38. Version

39. 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.

It is within this section that editing letters will be covered.

Some of the options are within sub-menus so below is a summary of the choices menu.

Choices menu	Sub menu
Appointment	Appointment Outcome
	Contacts
	Days
	Events
	Questions
	Responses
	RTT Status
	Transport
	Wait Types
Classes	
Classify	
Clinician	
Defaults	
Diagnoses	
Directorates	
DSCs	
Finance	Accounts
	Currencies
	Nominal
	Purchaser Codes
	Purchasing Card

GPs	GPs
	PCTs
	Practices
	Local
	Rebuild
History	Descriptions
	Discounts
	E-mails
	Fax
	Fitting
	GRN Reasons
	Items
	Manufacture
	Prices
	Suppliers
	Technicians
Initiators	
Intervention	
Letters	
Medical Conditions	
Mobility	Actions
	Items
	Locations
	Therapists
Note Categories	
Orthosis Codes	
Patients	Counties
	DOR
	Ethnicity
	Exempt
	Interface
	Services
	Titles
	Towns
Purchasers	
Referrer Types	
Referrers	
System	
Wards	

2. Choices – Appointments

1. Appointment Outcome

Menu: Utilities – Choices – Appointments – 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 (Edit, Enter)

To update an existing appointment outcome, find the outcome you wish to change and click on the 'update' icon (Edit, Update).

2. Contacts

Menu: Utilities – Choices – Appointments – 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 (Edit, Enter)

To update an existing contact, find the contact you wish to change and click on the 'update' icon (Edit, Update).

Reference: Reference is entered automatically

Name: enter the contacts name

Position:	enter their position/job title e.g. Physiotherapist
Location:	enter the department where they work e.g. Rehabilitation
Add1 - Add4	4 address lines available for when the contact is external
Service:	a service can be assigned so that copy letters only print if the patient is assigned to the same service as the carbon copy recipient

3. Days

Menu: Utilities – Choices – Appointments – Days

This holds the names of the days on which clinics are held. Monday to Friday have been set up for you.

4. Events

Menu: Utilities – Choices – Appointments – Events

On the appointment screen there is a field called *Event:*. This field has two purposes. One is to catergorise the type of appointment and against each category allocate set questions and possible responses to be completed after the patient has been seen. The event can also be used for assigning Referral to Treatment (RTT) actions.

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

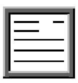
E.g an event of First Fitting could have a question of 'Did the orthosis fit?' with possible answers of Yes, No – Too small, No – Too big. (I realise this is a very simplistic example but I hope you get the idea.)

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 5 and 6 below for how to set up the Questions and Responses.

Setting up the Events for questions/responses

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

Event type in the event

RTT: this field is not relevant to questions/response auditing, but is a mandatory field so pick any opton from the pop-up list

DNA: this field is not relevant to questions/response auditing, but is a mandatory field so pick any opton from the pop-up list

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 disapear and then press **Ctrl-Enter** to save.

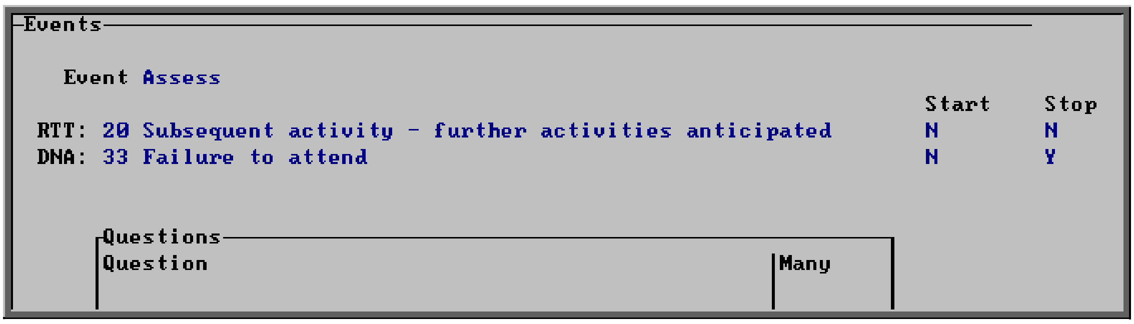
Setting up the Events for 18 week journey

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

Event type in the event

RTT: select the appropriate RTT action from the pop-up list for the attendance of this type of appointment

DNA: select the appropriate RTT action from the pop-up list for the **non-**attendance of this type of appointment



An example would be to create an event called 'Assess' and attach RTT codes 20 and 33 against it (see above).

This would then mean that if an appointment

- was linked to a Care Episode
- had an event of 'Assess'
- *Outcome* field updated to Attended

the RTT table would be updated with a code 20

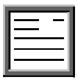
or if an appointment

- was linked to a Care Episode
- had an event of 'Assess'
- *Outcome* field updated to Did not Attend

the RTT table would be updated with a code 33 (unless the patient was a child).

5. Questions

Menu: Utiliites – Choices – Appointments – Questions.

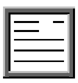
Click on the 'enter' icon  (Edit, Enter).

Question type in the question

Continue until all the questions have been entered.

6. Responses

Menu: Utiliites – Choices – Appointments – Responses

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

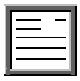
Response type in the reponse

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.

7. RTT Status

Menu: Utiliites – Choices – Appointment – RTT Status

The NHS defined RTT codes have been entered into OPAS. However, if your Trust has any additional codes, these can be added by clicking on the 'enter' icon  (Edit, Enter).

Code: enter the RTT code for the action

Description: enter a description for the

Start: enter Y if this action starts the clock. Otherwise enter N

Stop: enter Y if this action stops the clock. Otherwise enter N

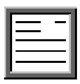
8. Transport

Menu: Utiliites – Choices – Appointment – 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  (Edit, Enter).

Reference Reference is entered automatically

Description enter the type of hospital transport

9. Wait Types

Menu: Utiliites – Choices – Appointment – 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 or 3
Routine	with a priority weighting of 1

To add a new Wait Type, click on the 'enter' icon (Edit, Enter).

Type enter the wait type description

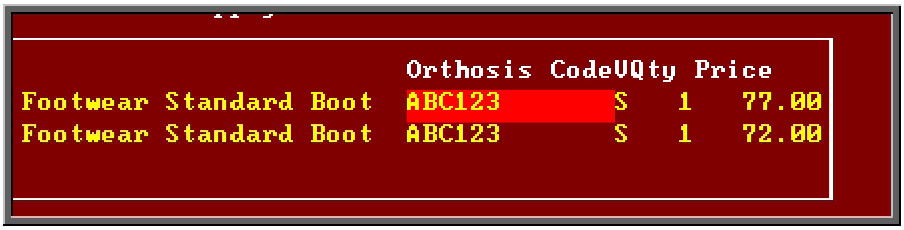
Weighting enter the priority weighting. Each person on the waiting list is given a score, which is calculated by multiplying the number of days they have been on the waiting list by the weighting of the Wait Type that they were given when added to the waiting list. Therefore, the higher the weighting, the faster their score will increase.

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 19. 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.



To add a new classification, click on the 'enter' icon (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.

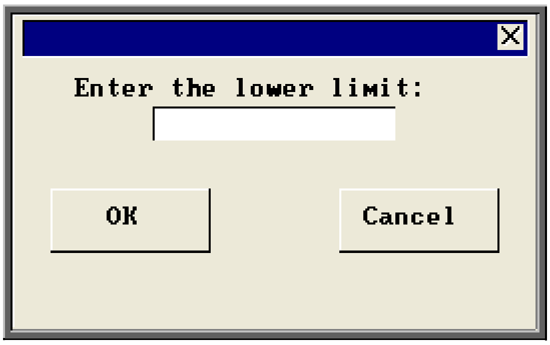
To bring in your OPrice schedule numbers so that they can be classified, click on the 'enter' icon (Edit, Enter).

Classifying individual items

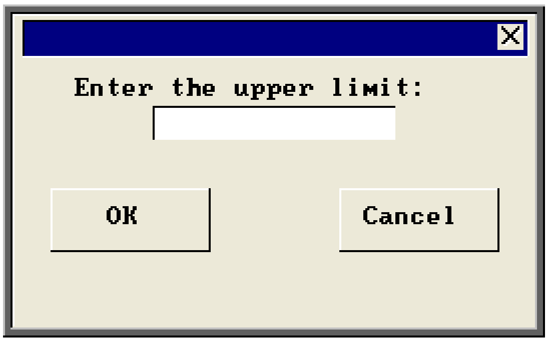
Each schedule number can be classified individually by finding the relevant number and clicking on the 'update' icon (Edit, Update), and selecting the appropriate classification from the pop-up list.

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 (Sort), and select Code and then Range.

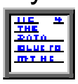


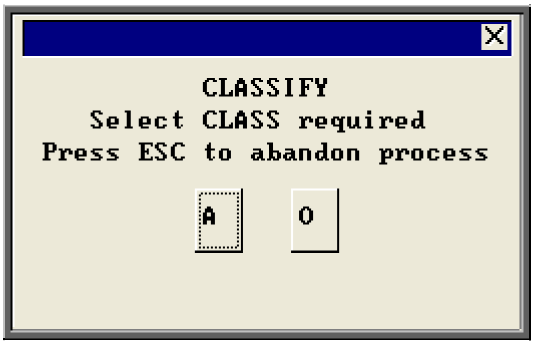
enter the first code in the range



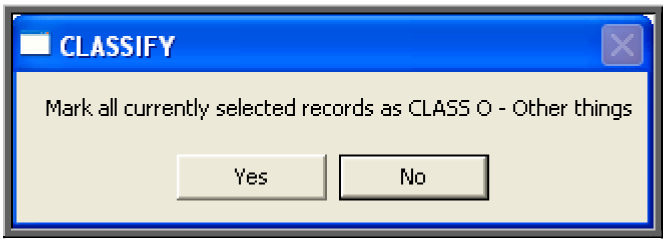
enter the last code in the range

- Once the records in your range have been found a Query Summary box will indicate the number of matches found, and isolate those items.

- Press **Esc** to remove the Query Summary box.
- Click on the 'update' icon  (Edit, Update) and choose the appropriate classification code from the prompt.



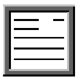
- Click on Yes (type **Y**) to confirm your selection.



5. Choices – Clinicians

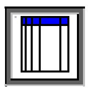
Menu: Utilities – Choices – Clinicians

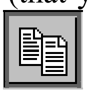
This is a list of personnel who hold clinics or see patients.

To add a clinician, click on the 'enter' icon  (Edit, Enter).

Reference	is entered automatically by the system and cannot be changed
Name	enter the clinician's name
Expertise	move the highlight using the space bar until the correct expertise is selected
Source	enter whether the Clinician is in-house or which contractor they are from
Fee	if there is a set fee for the Clinician, this can be entered here

It is not a good idea to delete clinicians as there could be patient, order and appointment records that make reference to them. If however, a clinician leaves, you can change their reference number so that they appear at the bottom of the pop-up list.

To change their reference number, firstly click on the 'browse' icon  (Data, Browse) as it is easier to see which reference numbers are available when the clinicians are viewed as a list.

Click on the clinicians name (that you wish to change) so that they are highlighted, then click on the 'swap' icon  (Edit, Swap).

At the bottom of the screen you will be asked for the new reference number.

Ensure you type a reference that is not currently being used and press **Enter**.

OPAS will now find all records that have the clinician on them (Patients, Orders, Appointments etc) and update the reference number. Once this is complete, the message below will appear.

Click on OK to continue.

6. Choices – Defaults

Menu: Utilities – Choices – Defaults

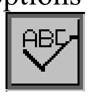
When entering information, there are certain fields that when you move to, automatically produce a pop-up list on the screen for you to make your selection from.

By going into Utilities – Choices – Defaults, you can decide which pop-ups appear automatically and which only appear if you press the Tab key.

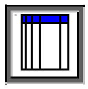
Also, if you usually put the same information in a particular field, then the field can be set to default to that rather than having to pick it from the list or type it every time.

When you go into the Defaults screen you will be presented with a record for each field that you can control.

As the default screen has grown over time, the options don't appear in any logical order.

You may find it useful to click on the 'sort' icon 

(Sort) and select Screen and then

Whole_File. It is also easier when it appear as a list so click on the 'browse' icon  (Data, Browse).

The first four fields are for your information and cannot be changed.

Number Reference number

Screen The screen the field appears in

Field The field name

Pop-up This informs you if there is a pop-up available for this field

Default 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. notes:) then enter the word you wish to appear automatically i.e. Assess.

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  (Edit, Update). 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 71 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.

7. Choices – Diagnosis

A list of standard medical diagnoses are held here for use on the Care Episode screen.

Menu: Utilities – Choices – Diagnosis

To add a new diagnosis click on the 'enter' icon (Edit, Enter)

To update an existing diagnosis, find the diagnosis you wish to change and click on the 'update' icon (Edit, Update).

8. Choices – Directorates

Menu: Utilities – Choices – Directorates

To add a new directorate click on the 'enter' icon (Edit, Enter)

To update an existing directorate, find the directorate you wish to change and click on the 'update' icon (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. If a code is entered here, it will automatically be assigned to any referrer created for that 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.

9. Choices – DSCs

The national Disablement Service Centres are listed here.

Menu: Utilities – Choices – DSCs

If you need to add new DSC's, click on the 'enter' icon  (Edit, Enter).

Code enter the code for the DSC

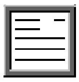
Name enter the name of the DSC

10. Choices – Finance

1. Accounts

This screen holds supplier account information, primarily to record Oracle information for transferring data to Oracle Financials, but blanket/call off numbers and additional copies of orders can be recorded here too.

Menu: Utilities – Choices – Finance – Accounts

To add account information click on the 'enter' icon  (Edit, Enter).

Code select the supplier from the pop-up list provided

*Name*will populate with the name of the supplier selected in the field above

OSN enter the Oracle Financials OSN number

OPS enter the Oracle Financials OPS number

Blanket enter a blanket/call off number for the supplier. This will then appear on patient and stock orders for the supplier

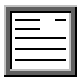
Copies if you are instant printing orders, you can request additional copies of orders for specific supplier. Enter the number of additional copies required.

2. Currencies

Menu: Utilities – Choices – Finance – Currencies

Information of foreign currencies is entered here for suppliers that deal in a currency than pounds sterling (£).

We have set up Euro, US Dollar and Yen for you, but you may need to update the exchange rate. To do this, click on the ‘update’ icon  (Edit, Update) and move down to the *Exchange Rate* field. Press **F8** to clear the field and enter the correct rate.

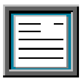
If you do require more currencies, click on the ‘enter’ icon  (Edit, Enter).

Ref:	is entered automatically by the system and cannot be changed
Currency	enter the name of the currency
Symbol	enter the currency symbol
Position	enter B if the currency symbol goes Before the amount enter A if the currency symbol goes After the amount
Exchange Rate	enter the current exchange rate

3. Nominal

Menu: Utilities – Choices – Finance – 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 screen. To create a pop-up list in the nominal code field on the invoice, create the nominal codes here.

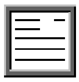
To add new nominal codes, click on the ‘enter’ icon  (Edit, Enter).

Code	enter the nominal code
Description	enter a description for the nominal code

4. Purchaser Codes

Menu: Utilities – Choices – Finance – 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  (Edit, Enter).

HA Code	enter the Health Authority code
Name	enter the name of the Health Authority

5. Purchasing Card

Menu: Utilities – Choices – Finance – 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  (Edit, Enter), and select the supplier from the pop-up list.

11. Choices – GPs

1. 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. Wynnlodge Limited is 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.

To add a new GP click on the 'enter' icon  (Edit, Enter)

Count is automatically entered by the system and cannot be changed

Reference is the GPs FHSA reference

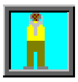
Doctor is the GP's name and must be entered as e.g. **WILSON A**, not **DR A WILSON**, so that the list can be put correctly into alphabetical order

GP Code is normally entered as the FHSA reference (same as *Reference*)

2. PCTs

Menu: Utilities – Choices – GPs – PCTs

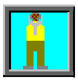
This holds details of the Primary Care Trusts.

Click on the 'GP' icon  (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.

3. Practices

Menu: Utilities – Choices – GPs – Practices

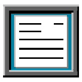
Click on the 'GP' icon  (GPs) to see the GPs in the Practice that is currently on the screen.

4. Local

Menu: Utilities – Choices – GPs – Local

Utilities - Choices - GPs holds the national database of General Practitioners. When you are in the Patient screen, the pop-up list on the GP field shows this entire database for you to select from.

If you wish to narrow this list to GPs in your geographical area, then you can select your local PCTs here.

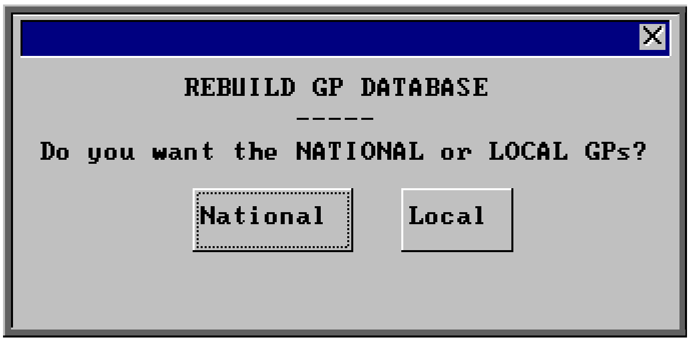
Add a new PCT to you local list by clicking on the 'enter' icon  (Edit, Enter), and select the supplier from the pop-up list.

To activate your local list see the note below.

5. Rebuild

Menu: Utilities – Choices – GPs – Rebuild

Once your local PCTs have been identified, to make the GP's that belong to these PCTs be the only ones seen in the pop-up list in the Patient screen, select Local.



To return the pop-up back to the full list, select National.

Press **Esc** if you want to abandon the option.

12. History

1. Descriptions

Menu: Utilities – Choices – History – Descriptions

The *Description* field appears on the order, prescription and waiting list 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 (Edit, Enter)

To update an existing description, find the description you wish to change and click on the 'update' icon (Edit, Update).

2. Discounts

Menu: Utilities – Choices – History – Discounts

This is used to enter details of any supplier 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.

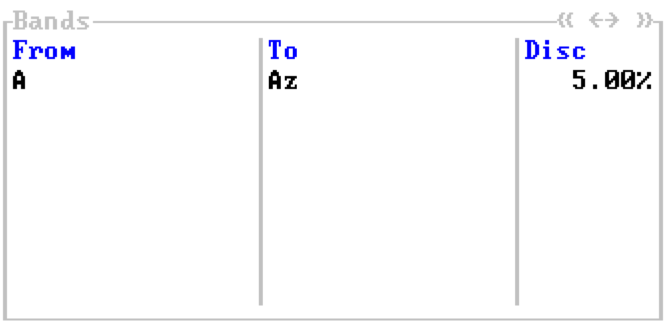
When adding a new discount click on the 'enter' icon (Edit, Enter).

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



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.

3. E-mails

Menu: Utilities – Choices – History – 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  (Edit, Enter).

Code find the supplier in the pop-up list and press **Enter**.

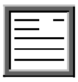
Address: type in the e-mail address for the supplier.

4. Fax

Menu: Utilities – Choices – History – 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 you 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  (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.

5. Fitting

Menu: Utilities – Choices – History – 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 (Edit, Enter).

To update existing fitting and selling prices, find the item you wish to change and click on the 'update' icon (Edit, Update).

Itemcode	is the item code (schedule number) as in the Prices list. Press **Tab** key for a list of items
Selling	is the price at which you will sell this item on
Fitting	is any additional fitting charge for this item (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

6. GRN Reasons

Menu: Utilities – Choices – History – GRN Reasons

When returning goods on an order, you are given the opportunity to enter a reason for the return. Instead of typing it, you can set up a pop-up list of reasons to choose from. You can still type in reasons manually, so by just creating your most common reasons for return will keep the pop-up small and manageable.

To add GRN reasons, click on the 'enter' icon (Edit, Enter).

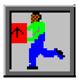
7. Choices – Items

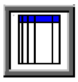
Menu: Utilities – Choices – History – Items

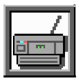
This is the list of items supplied to patients and comprises both the OPRICE list and additional NSI and Stock items.

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 29. NSI).

If you would like to compare prices for a particular item:

find the relevant item and then click on the 'prices/suppliers' icon  (Prices) 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  (Data, Browse).

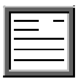
To print the information click on the 'print' icon  (File, Print) and select Custom Report. At the top of the screen select This_view. Highlight PLIST and click on Run. A print box will appear which defaults to 1 copy to the printer. If you require more than one copy simply change the number in the copies box. Click on OK to continue or Cancel to abort the print.

To return to the item screen, click on the 'exit' icon  (File, Return).

8. Manufacture

Menu: Utilities – Choices – History – 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  (Edit, Enter), type the department name and press **Ctrl-Enter**

9. Prices

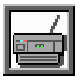
Menu: Utilities – Choices – History – Prices

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 - History - 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 29. NSI).

Using the Shopping Basket

Click on the 'printer' icon  (File, Print), 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.

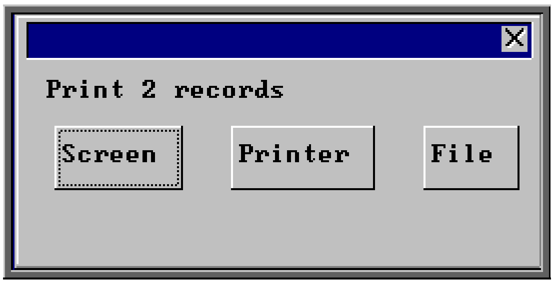
Continue to pick items from the pop-up list until all the items you want have been selected.

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 Lt
Supplier 3: Remploy Healthcare (2 items) Supplier 4: Jane Saunders & Manning L
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

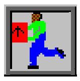
A comma separated variable file will be created called basket.csv. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.

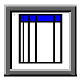
10. Suppliers

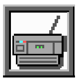
Menu: Utilities – Choices – History – Suppliers

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  (Prices)

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

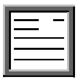
To print the information click on the 'print' icon  (File, Print) and select Custom Report. At the top of the screen select This_view. Highlight PLIST and click on Run. A print box will appear which defaults to 1 copy to the printer. If you require more than one copy simply change the number in the copies box. Click on OK to continue of Cancel to abort the print.

To return to the item screen click on the 'exit' icon  (File, Return).

11. Technicians

Menu: Utilities – Choices – History – Technicians

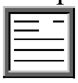
This option is for hospitals that have on site workshops, where appliances are made or altered.

To add a technician, click on the 'enter' icon  (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)

13. Choices – Initiators

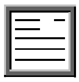
Menu: Utilities – Choices – Initiators

If you wish to create a pop-up list of initiators to use in the Care Episode screen, click on the 'enter' icon  (Edit, Enter).

Reference	is entered automatically by the system and cannot be changed
Initiator	enter an initiator

14. Choices – Intervention

Menu: Utilities – Choices – Intervention

If you wish to create a pop-up list of intervention types to use in the Care Episode screen, click on the 'enter' icon  (Edit, Enter).

Type:	enter the number for the intervention type
Description:	enter the description for the intervention type

15. Choices – Letters

Menu: Utilities – Choices –Letters

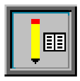
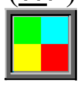
This is where all your letter templates are kept. There are different letter types for using from different areas of OPAS. When you go into the letter screen all the types of letters will be listed alphabetically by short name.

Ad hoc Letters	ADHOCA to ADHOCZ 26 standard letters used to create one off letters using the Letters category in medical notes.

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.
Loan Letters	LOANREMA to LOANREMZ 26 standard letters that can be sent to remind patients to return items on loan
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.
Waiting List letters	WAITLSTA to WAITLSTZ 26 standard letters that can be sent to patients on the waiting list
WF1	Template for National Health Service Form WF1 (Supply of Wigs and Fabric Supports)

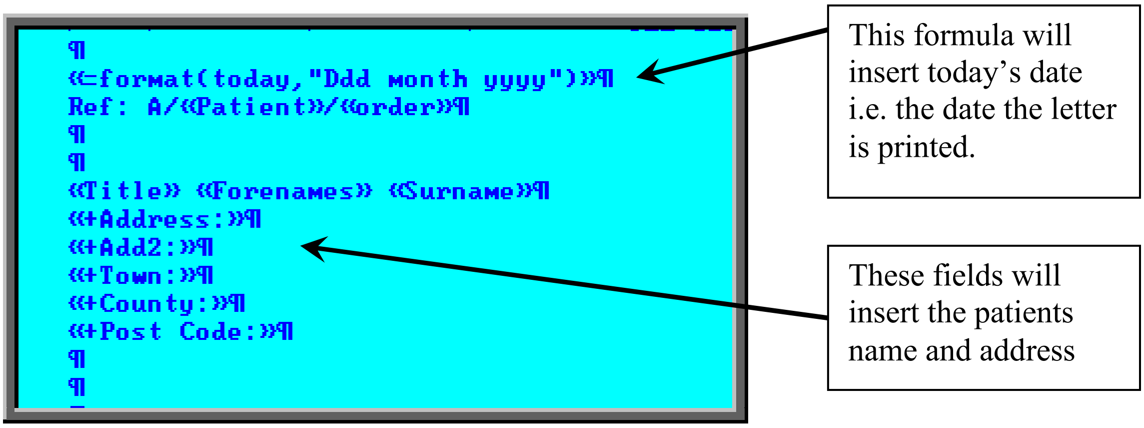
Editing Letters

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  (WP) to see the letter. Then click on the 'four coloured squares' icon  (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 (type L)
click on Font (type F)
click on Bold (type B)
click on Insert (type I)
use the arrow keys to highlight the text you want to make bold and then press **Enter**

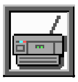
To make existing text Underscored**:**

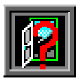
Move your cursor to the start of the text you wish to underscore
click on Layout (type L)
click on Font (type F)
click on Underscore (type U)
click on Insert (type I)
use the arrow keys to highlight the text you want to underscore and then press **Enter**

To change the font of existing text:

Move your cursor to the start of the text you wish to change
click on Layout (type L)
click on Font (type F)
click on Change (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  (File, Print) and clicking on OK.

To come out of the letter once you have finished, click on the 'exit' icon  (File, Exit), and then click on the 'exit with a question mark' icon  (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.

16. 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 (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 (**F6** and **F5**) to find the medical condition you wish to interrogate. Then click on the 'patients' icon (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 (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 (File, Print)

Select **Letter** from the print menu

Highlight the CONDIT letter you wish to produce from the list provided

Select the number of copies required

Highlight **Yes** to continue and press **Enter**

17. Choices – Mobility

1. Actions

Menu: Utilities – Choices – Mobility – Actions

To add actions that can be applied to wheelchairs, click on the 'enter' icon (Edit, Enter).

2. Items

Menu: Utilities – Choices – Mobility – Items

To add wheelchairs types and accessories that are issued to patients, click on the 'enter' icon (Edit, Enter).

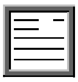
3. Locations

Menu: Utilities – Choices – Mobility – Locations

To add locations that wheelchairs can be held, click on the 'enter' icon (Edit, Enter).

4. Therapists

Menu: Utilities – Choices – Mobility – Therapists

To add therapist, click on the 'enter' icon  (Edit, Enter).

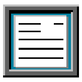
Reference: is entered automatically by the system and cannot be changed

Therapist: enter the therapist name

18. 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  (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.

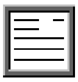
Note: Categories of 'Dictionary', 'Video', 'Picture' and 'Temp' have already been set up for you. The purpose of these are explained in Patients - Note 15. Entering medical notes.

19. 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  (Edit, Enter).

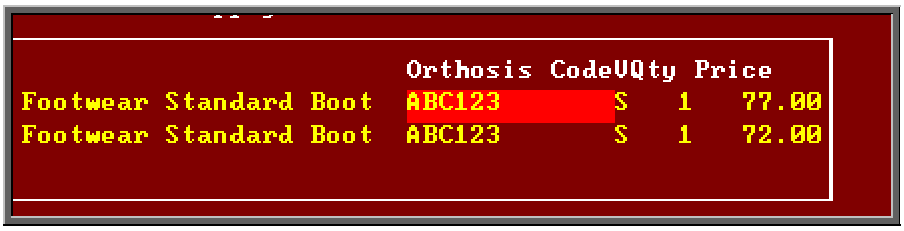
Orthosis Code the orthosis code (up to 12 characters).

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. Choices - 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.



An orthosis code can be linked to several classes.

20. Choices – Patients

1. Counties

Menu: Utilities – Choices – Patients – Counties

A list of counties can be set up as a pop-up list for the *County* field on the Patient screen.

Click on the 'enter' icon (Edit, Enter) and enter as many counties as is needed.

2. DOR

Menu: Utilities – Choices – Patients – 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 (Edit, Update). Move to the *Description* field. Press **F8** to remove the contents of the field and type in the correct *Description*.

3. Ethnicity

Menu: Utilities – Choices – Patients – Ethnicity

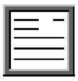
If it is required to classify patients by their ethnic origins click on the 'enter' icon (Edit, Enter) and enter the codes and descriptions that will be used.

To update an existing Ethnic Origin, find the Ethnic Origin you wish to change and click on the 'update' icon (Edit, Update).

4. Exempt

Menu: Utilities – Choices – Patients – Exempt

A list of prescription exemptions can be set up as a pop-up list for the *Exempt* field on the Patient screen.

Click on the 'enter' icon  (Edit, Enter) and enter as many exemptions as is needed.

5. Interface

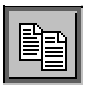
Menu: Utilities – Choices – Patients – Interface

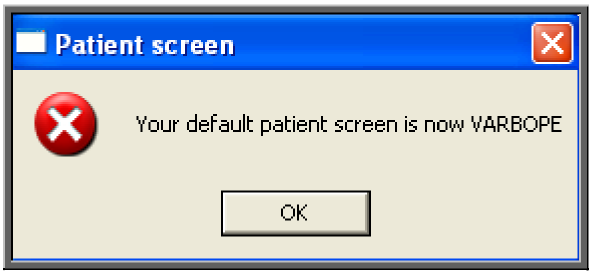
Screen	Case	Notes	Orders	Appoints	ArchAppt	Prescrip	Mobility
VERBOSE	UPPER	Yes	Yes	Yes	No	No	No
VERBOPE	UPPER	Yes	Yes	Yes	No	Yes	No
VERBOME	UPPER	Yes	Yes	Yes	No	Yes	Yes
VERBOWE	UPPER	Yes	Yes	Yes	No	No	Yes
VERPOSE	Proper	Yes	Yes	Yes	No	No	No
VERPOPE	Proper	Yes	Yes	Yes	No	Yes	No
VERPOME	Proper	Yes	Yes	Yes	No	Yes	Yes
VERPOWE	Proper	Yes	Yes	Yes	No	No	Yes
VARBOPE	UPPER	Yes	Yes	Yes	Yes	Yes	No
VARPOPE	UPPER	Yes	Yes	Yes	Yes	No	No

This screen summarises the different Patient screens, showing which tables are included.

The *Case* field indicates whether the Patients name and Address will default to UPPER or Proper case when entered.

To help you choose which screen to use, highlight an option and click on View at the top of the screen to see what it would look like.

Once a decision has been made, click on the 'swap'icon  (or Use) from the view screen or the interface summary.

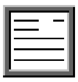


6. Services

Menu: Utilities – Choices – Patients – Services

Where OPAS is being used by more than one service, these can be created here and assigned to patient's records.

The *Service* field is on the Patient, Venue, Waiting List and Contacts screen.

To add a service, click on the 'enter' icon  (Edit, Enter).

Service	enter the service code
Description	enter the service description
Elements	enter the elements that make up the service

7. Titles

Menu: Utilities – Choices – Patients – 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.

8. Towns

Menu: Utilities – Choices – Patients – Towns

A list of towns can be set up as a pop-up list for the *Town* field on the Patient screen.

Click on the ‘enter’ icon (Edit, Enter) and enter as many towns as is needed.

21. 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 and PCT 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 (Edit, Enter).

Reference is entered automatically by the system and cannot be changed.

Short name the first few letters or initials of the purchaser, to enable quick selection of that purchaser.

Purchaser is the full name of the purchaser.

Type enter I if the purchaser is internal, or E if the purchaser is external.

Discount is entered if you give that purchaser an across-the-board discount.

Sales VAT	is entered as **Y** or **N** to indicate whether VAT is applied on invoices to this purchaser.
Fitting	is entered as **Y** or **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 12. Choices – History - Fitting).
Account Code	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.
Card	is entered as **N** if the purchaser is not using purchasing cards (this is the default) or entered as **Y** if they are.
Print	enter **Y** if orders for this purchaser are to be instant printed. leave blank to batch print enter **N** to prevent orders printing in batch or instant print (if switched on).
Copies	If instant print of orders is switched on, extra copies (to those requested in the system parameter screen) can be printed for the purchaser.
Invoices	6 address lines, Phone and Fax are available for where invoices are to be sent for the purchaser.
Deliveries	6 address lines, Phone and Fax are available for where goods are to be delivered for the purchaser.

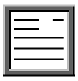
Note: The invoice and delivery details can be included on the printed order.

22. 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

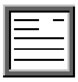
If you want to add further referrer types click on the 'enter' icon  (Edit, Enter)

Code enter an appropriate code

Description enter a description for the referral type

23. Choices – Referrers

Menu: Utilities – Choices – Referrers

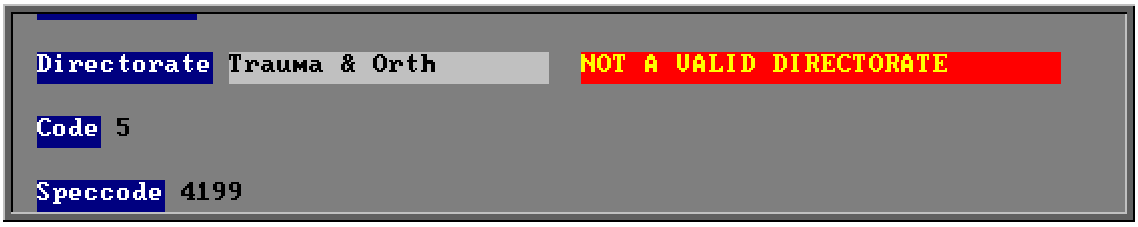
To add a new referrer click on the 'enter' icon  (Edit, Enter)

Reference is entered automatically by the system and cannot be changed

Referrer 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**

Directorate 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.

Note: If you choose to type the directorate in manually (rather than selecting one from the pop-up list) and it does not match a directorate in your list the following message will appear on the screen.



If the directorate you require is not in the list, the field can be left blank so that you can go into Utilities – Choices – Directorates and create the missing directorate.

Code 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.

Speccode 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.

Type 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).

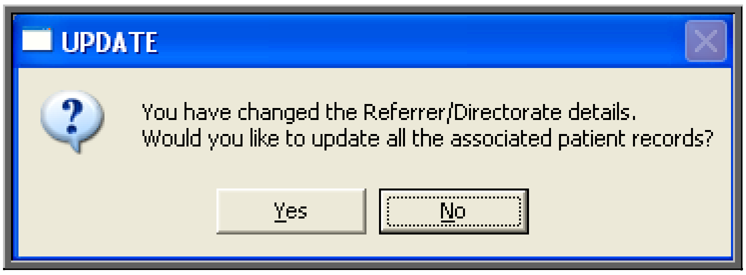
Budget if you know the referrers budget, it can be entered here.

Card 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

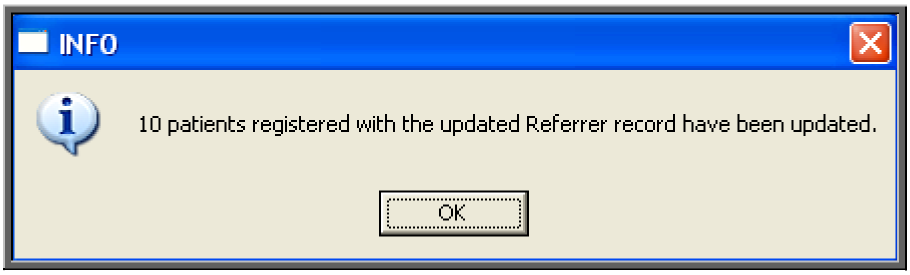
To update an existing referrer, find the referrer you wish to change and click on the 'update' icon  (Edit, Update).

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.

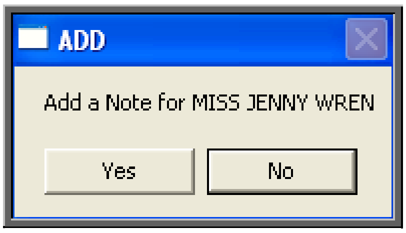
Note: If you have a new referrer to add, but he is replacing an existing referrer who has left, you may wish to update the referrer record for the referrer who has left with the name of the new referrer. This would enable you to update all the patients who had the old referrers name on their record with the new referrers name, providing you have answered Yes to the above prompt.

24. 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  (**PgDn**) to see all the options.

VAT Rate	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
Hospital Name	would only be changed if the name of the Trust changed
Stock Supplier (1)	the supplier number for stock supplier 1 is 888
Stock Supplier (2)	the supplier number for the second stock location (usually 777)
Stock Supplier (3)	the supplier number for the third stock location (usually 666)
Stock Supplier (4)	the supplier number for the fourth stock location (usually 555)
Stock Supplier (5)	the supplier number for the fifth stock location (usually 444)
Last Home Purchaser	purchasers should be entered into the system with internal purchasers first. 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 $\boxed{3}$ would be entered here. Alternatively, when the purchasers are created, indicate on each one whether it is an internal or external purchaser.
Use Large Icons	is set to Yes to show large icons. If you prefer small icons, change this to No
Monitor messages	if this is set to Yes, you will be prompted when you have new messages (see Utilities - Note 28. Messages)
'Windows' messages	normally set to Yes to show messages in the normal Windows style
Default	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.

Dormant time — 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.

Auto-update DOR — if this is set to Yes, whenever a patient is added or amended with a valid postcode in their address the *DOR* field on the patient record will be automatically populated.

Printing

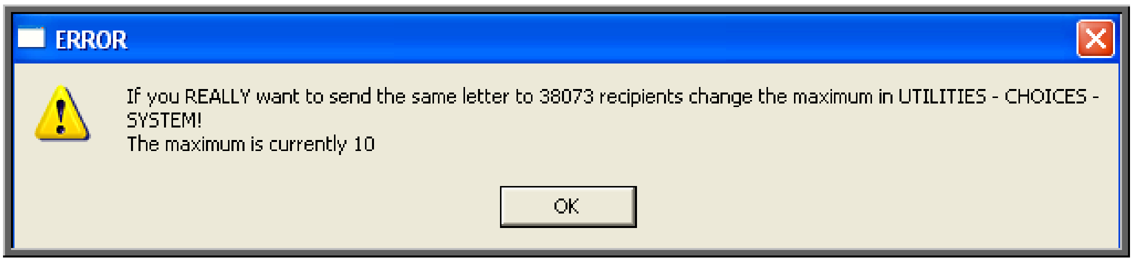
General Printer — is the printer used for letters and reports. To change this, set the required printer as the default in Windows, then in this screen move the cursor down to this line and press **Tab**

Order Printer — 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)

FAX Printer — 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)

Instant Invoice — 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.
GRN	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 GRNs that you wish to be printed instantly.
Orders	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 21. Choices – Purchasers).
Select Purchaser	if this is set to Y, a pop-up will give you the opportunity to select which purchasers orders are to printed when batch printing
Stock Orders	if this is set to anything other than 0, the stock 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 21. Choices – Purchasers).
Instant Appt Letters	if you wish to instant print appointment letters, select Yes
Collection Letters	if you wish to instant print collection letters, select Yes
Transport Memos	if you wish to instant print transport memos, select Yes
Waiting List Letters	if you wish to instant print waiting list letters, select Yes
Max mail merges	to set the number of maximum letters that can be produced (excludes Appointment and Collection letters). This is to prevent, for example, a HSA5 form being produced for all your patients. If you try and produce letters for more than your maximum, the following message will appear:



Paths

'Launch' with: Still:	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.
'Launch' with: Video:	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.
'Launch' with: Scanned:	type in the path of the executable file of the software on your PC that is used to display scanned image. If you do not know this, your IT department should be able to help you.
'Launch' with: Documents:	type in the path of the executable file of the software on your PC that is used to display documents (e.g. MS Word). If you do not know this, your IT department should be able to help you.
PAS link path	enter the path to the PASlink, if installed
Case conversion	if using PASlink, the data can be converted into UPPER or Proper case
Upgrade path	the path to the files provided by Wynnlodge Ltd for upgrades to the OPAS System. This is normally left blank to indicate A: (the floppy drive).
Export path	this is used by those exporting information from OPAS into the main hospital system
Include fieldnames	this is used by those exporting information from OPAS into the main hospital system
RTT actions export	this is used to say when RTT information from OPAS into the main hospital system is exported

RTT path	this is used by those exporting RTT information from OPAS into the main hospital system

Appointments

Appointment time	is the default length of time in minutes for an appointment: it should show the most common length of appointments.
Clinic Usage	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.
Automatic Delay	enter the number of days delay in searching for appointments from the order and waiting list
Earliest/latest times the *with transport*	enter the earliest and latest times for the morning and afternoon that appointments that require transport can be offered.
Cancelled Appoints	once appointments are cancelled, this option decides whether they are kept on the system and identified by being highlighted in red, or removed (K for keep for R for remove).
No of Transport Memos	enter the number of copies of transport memos required
Collections printed on Clinic Lists?	when printing clinic lists, set collections to print or not automatically, or to be asked each time if they are required
Demographics also?	when printing clinic lists, to set whether to be given option to print patient demographics
Remove from Waiting List when Appoint is:	select whether patients are removed from the waiting list when appointments are Made or Attended.
Remove on DNA:	when marking a waiting list appointment as DNA, select whether patient should be removed or not automatically or asked each time.
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, Review and Cast appointments. Leave these blank for unlimited number of appointments.
Event for Fittings	select the event that will be entered on appointments made from the order

History

Update after Pass	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.
Process invoices for received/supplied either *goods only*	if this is set to Yes, the invoice can not be amended for adding invoice details unless the goods have been received or supplied
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.
Record delivery notes	if this is set to Yes, when goods are booked in on the patient and stock order, you will be prompted to enter the delivery note number.
Manufacture	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.

E-mail orders — if you wish to e-mail orders enter c:\daemon\ in this field.

<u>Finance</u>

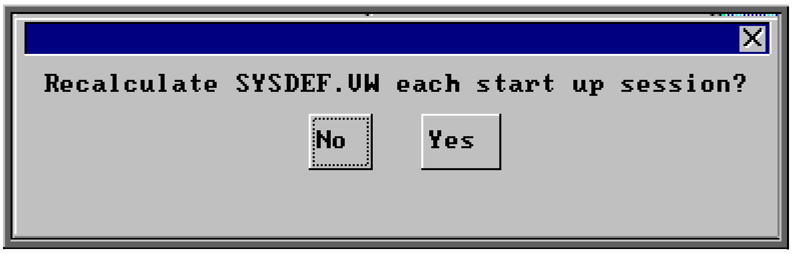
Sage version — if you are exporting invoice details to Sage software, enter the version of Sage used

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:

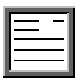


and you **must** press **Enter**.

25. Choices – Wards

Menu: Utilities – Choices – Wards

These appear in a pop-up menu on the Patient and 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  (Edit, Enter).

26. Ex-patients

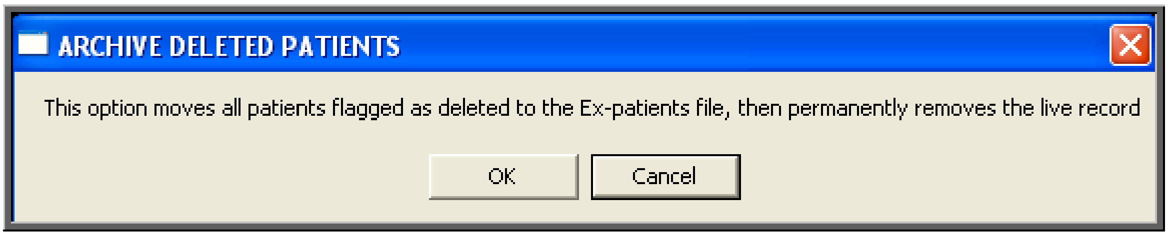
Menu: Utilities – Ex-patients

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 or appointment for several years, are transferred too (see Patients – Note 28. 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.

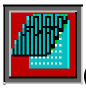
If there are no deleted patient records to be moved into Ex-patients you will get the following message instead.

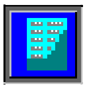
Looking at archived patients

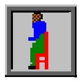
Menu: Utilities – Ex-patients – Ex-patients

Selecting this option will show you those patients that have been archived.

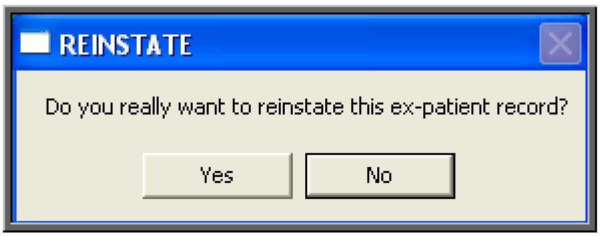
There is not as much information shown on the initial Ex-patients screen as there is on the active Patient screen, but you can still access all that patients' orders, notes and appointments.

To look at their orders, click on the 'orders' icon (History).

To look at their notes, click on the 'notes'  icon (Notes).

To look at their appointments, click on the 'appointments' icon  (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.

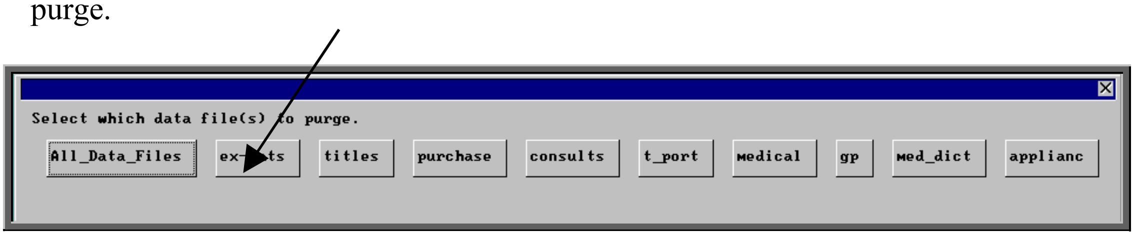
If you select Yes and you are the only person logged onto OPAS, then the following prompt will appear when the transfer is complete.

If you select Yes and you are **not** the only person logged onto OPAS, then the following prompt will appear when the transfer is complete.

OPAS can copy the patient's details into the live area when there are others logged on, but it can not delete the file from the ex-patients area.

To remove the Ex-patient file, as soon as you are the only person using OPAS, go into Utilities – Ex-Patients – Ex-Patients and click on Data, Krunch.

You will be warned that this will permanently remove any ex-patient that is marked as deleted. Click on OK to continue and then select ex-pats from the list of files to purge.



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.

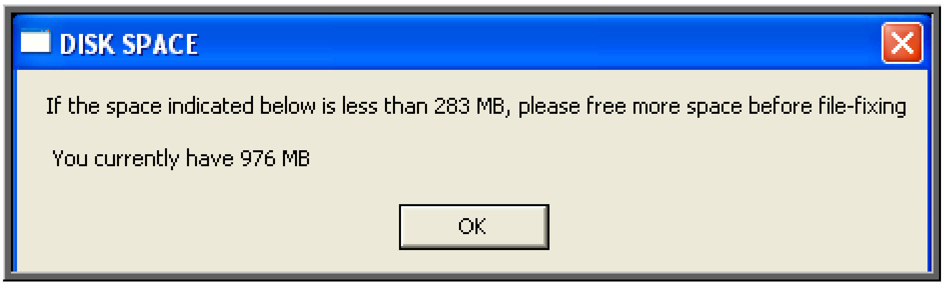
27. File Fix

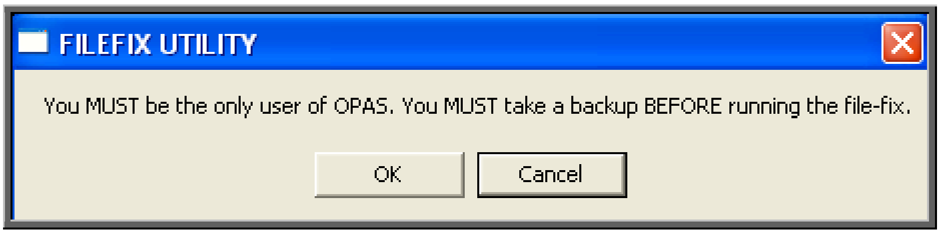
There are occasions (particularly following a power failure) that we will ask you to run a File Fix. This will check the main database files to ensure that there are not any problems and if there are it will attempt to fix the relevant files. This option will take approximately 30 minutes to run. If 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.

28. 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.

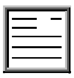
Press **Ctrl-Enter** to save the changes made. The following prompt will appear. Press the **Enter** key.

OPAS will check for new messages each time you return to a menu screen. When you have new messages the following prompt will appear.

To go to your in-box at any time select 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

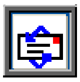
Note: OPAS does not validate that the order, appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

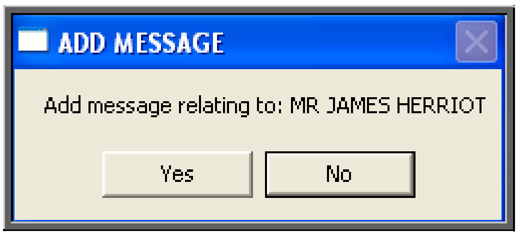
Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

c) Sending messages from the Patients screen

Menu: Patients

Click on the 'messages' icon  (Message).



Click on Yes (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

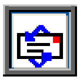
Note: OPAS does not validate that the order, appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

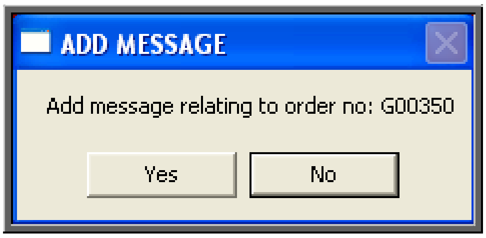
Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

d) Sending messages from the Order screen

Menu: History – Orders

Click on the 'messages' icon  (Message).



Click on Yes (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.

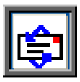
Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

e) Sending messages from the Appointment screen

Menu: Appointments – Current – Appointments

(or any other method used to get to the Appointment screen)

Click on the 'messages' icon  (Message).

Click on Yes (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
Appointment:	appointment details will have been entered for you (this will appear as a number and not a date/time)
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.

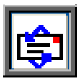
Message:	enter your message here. There are nine lines available for your message.

Having completed your message press Ctrl-Enter to send.

f) Sending messages from the Care Episode screen

Menu: History – Care Episodes

(or any other method used to get to the Care Episode screen)

Click on the ‘messages’ icon  (Message).

Click on **Yes** (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

Appointment: *press* the **Tab** key to access the pop-up list of appointments

Care Episode: care episode details will have been entered for you

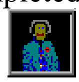
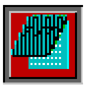
Note: OPAS does not validate that the appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

g) 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  (Goto, Patient).
- If order details have been completed, you can jump to the order by clicking on the ‘order’ icon  (Goto, Order).

- If appointment details have been completed, you can jump to the appointment by clicking on the 'appointment' icon (Goto, Appointment).
- If care episode details have been completed, you can jump to the care episode by clicking on the 'care episode' icon (Goto, Care).
- If you wish to reply to the message, click on the 'enter' icon (Reply).
- If you wish to remove the message from your inbox, click on the 'delete' icon (Clear). This will also delete the message from the senders outbox.

29. 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.

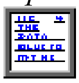
To add a new item, click on the 'enter' icon (Edit, Enter).

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.

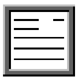
If the code is unique, you will be asked to confirm that you wish to continue.

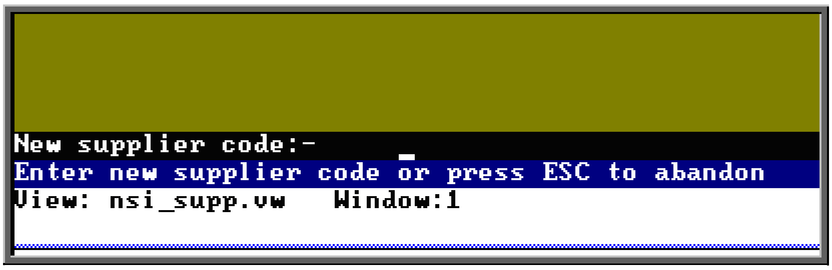
Click on No to abandon this option. Otherwise click on Yes and enter a *Description* and the standard *VAT Rate* for the item.

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  (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  (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
Shortname	enter an abbreviated name for the supplier (you will be able to search for suppliers in the pop-up list by this Shortname)
Currency:	*select the currency of the supplier from the pop-up list*
Add1 – Add4	there are 4 lines available for entering the supplier address
Postcode	enter the supplier's postcode
Phone	enter the supplier's phone number
Fax	enter the supplier's facsimile number
Contact	if you have a contact name for the supplier, this can be entered here
Vendor No.	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  (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  (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  (Edit, Update).

30. 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 Utilties – 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  (Edit, Update).

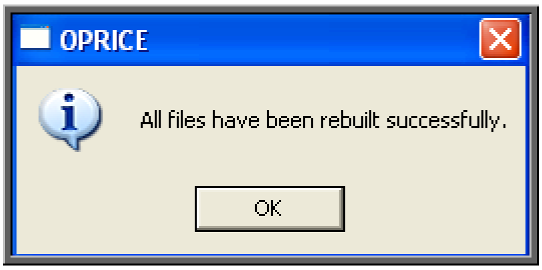
Menu: Utilities – OPrice – Previous

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 Wynnlodge 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.



31. Order numbers

1. Standard Formula

Menu: Utilities – Order Numbers – Standard Formula

Note: 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 editting 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!

2. Portable Formula

Menu: Utilities – Order Numbers – Portable Formula

Note: 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"|right(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 editting 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
```

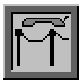
Where a hospital number is not known, a patient can be allocated a temporary number by typing ? at the patient entry screen. A sequential number is allocated by the system, prefixed by the text shown on the second line of the file above e.g. TEMP.

Do not make any changes unless you are confident about what you are doing!

32. PAS Link

Menu: Utilities – PAS Link

If the hospital has bought some additional software from Wynnlodge 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  (Paslink) in the Patient screen.

33. Password

1. Standard

Menu: Utilities – Password – Standard

Use this screen to change your log in 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 in 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.

2. Verification

Menu: Utilities – Password – Verification

Use this screen to change your verification password (used for verifying notes).

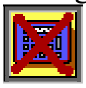
If you do not have a verification password (or if you have forgotten it and the OPAS administrator has reset it) type in your log-in password.

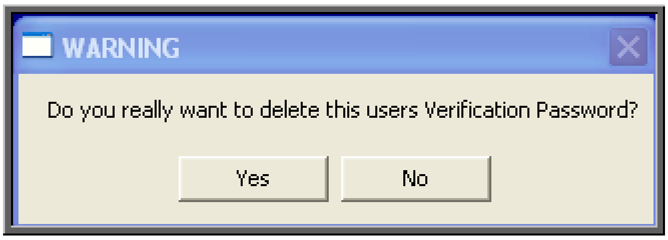
Then you will be asked to type in your new verification password.

You will be asked to type your new verification password again, before confirming that your password has been stored.

Resetting a verification password

No one has the ability to look up a verification password (not even Linda or Martin at Wynnlodge). If somebody forgets their verification password, then a user with administrator access has to reset it so they can go through the steps above again. To reset verification passwords go into Utilities –

Users. Once you are looking at the relevant user record, click on the 'cancel verification' icon  (File, Clean_Up, Verification).



Click on Yes to continue.

You will then be asked to enter your own password, to confirm that you are the administrator.

34. 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.

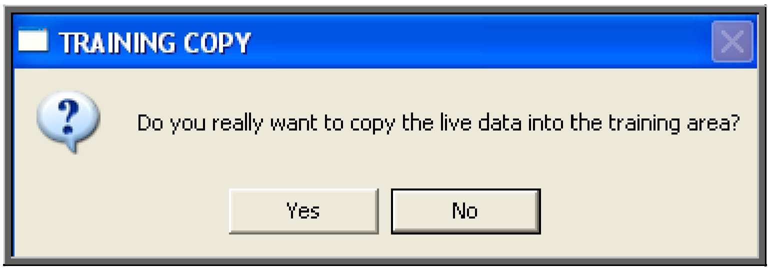
35. Training

1. Copy

Menu: Utilities – Training – Copy

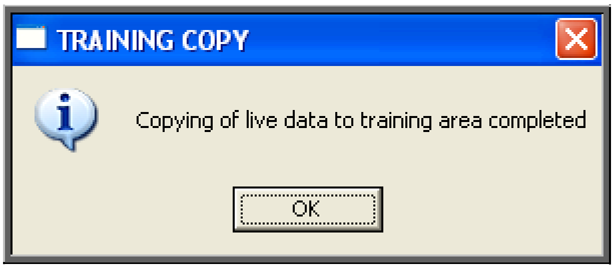
This option will transfer the data held in your live system into the training database. This makes the training area look more 'life like' and provides plenty of data to practice with.

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.

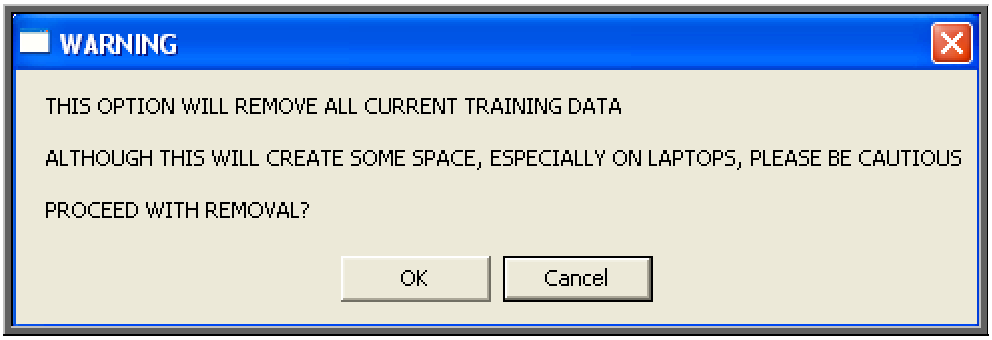


To log onto the training database, click on the OPAS icon as usual, but instead of logging on as yourself, log on with the User ID of Trainee. You will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.

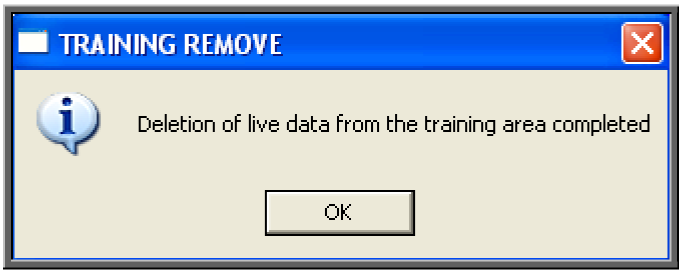
2. Remove

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.

36. Upgrade

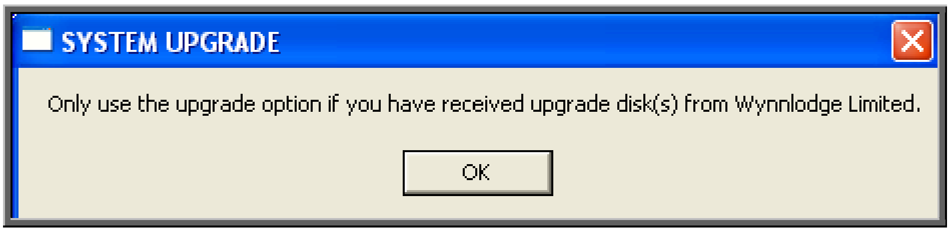
Menu: Utilities – Upgrade

This option should only be used if you have received an upgrade disk from Wynnlodge Limited. **DO NOT** use this option with disks received from anybody else.

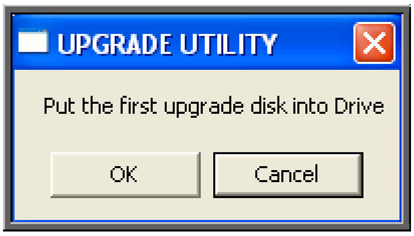
We periodically send you upgrade disks to update

- prices
- report layouts
- letter layouts

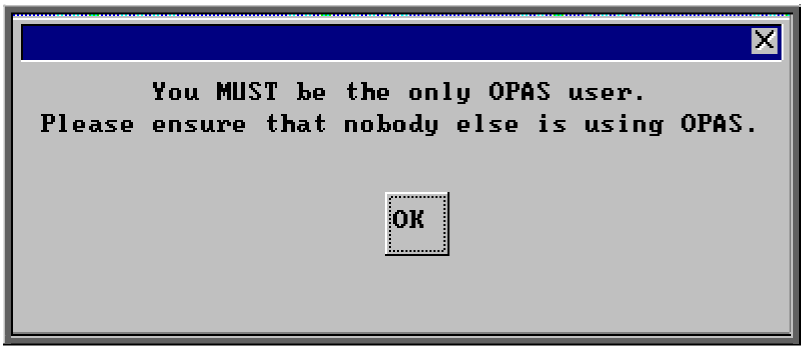
When you receive an upgrade disk to update reports or letters, make sure you are the only person logged onto OPAS before selecting this option (if you are not sure, click on Utilities – Who to find out who is logged on).



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.

37. 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.

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	the password will be entered for you. It will be the same as the user id and in CAPITALS
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.
Print	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.
Assigned User Mode	enter USER if the new user is to only have access to the screens used for day-to-day clerical procedures. 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.

Information Set	press the Tab key and select standard from the pop-up list.
Language	leave this field blank
Autohelp	select Yes
Application Help	select Read_only
Technical Reference	select Read_only
Procedures	select Read_only
Definitions	select Read_only if they have been set up as USER above.
	select Author if they have been set up as ADMIN above.
Administrator	select No
Language Maintenance	select No
Personal Directory	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 (type Y).

All of the fields (except the password) can be changed later by clicking on Edit and selecting Update.

Resetting passwords

If someone forgets their password, then their password can be reset (back to their user name) by finding their user account in and selecting File, Clean_Up, Password from the top of the screen.

You will then be asked to enter your own password, to confirm that you are the administrator.

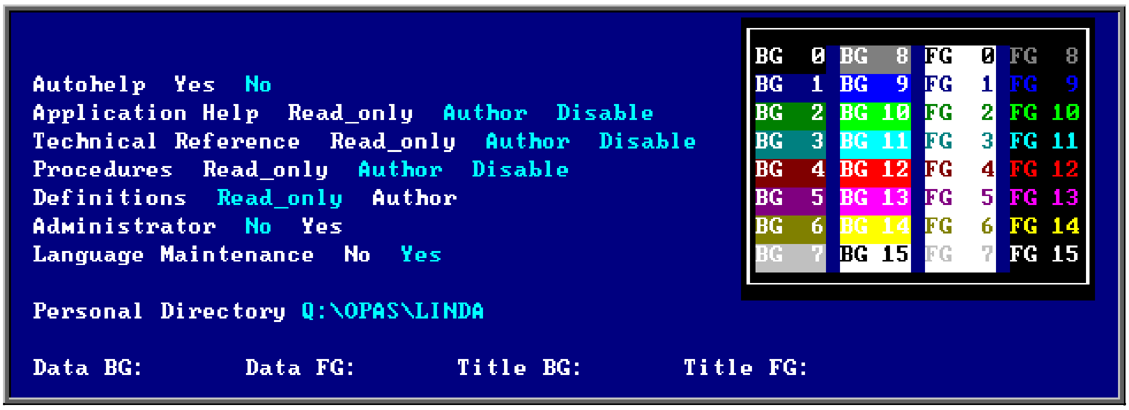
Choosing screen colours

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 (F6 key).

Click on the 'update' icon (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

```
Data BG: 1     Data FG: 15     Title BG: 1     Title FG: 15
```

will give you

```
Hospital No TORUS004                 NH
Title         Forenames
MISS          TESSA
  Address 213 Prospect Avenue
          Main Road
     Town Preston
```

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.

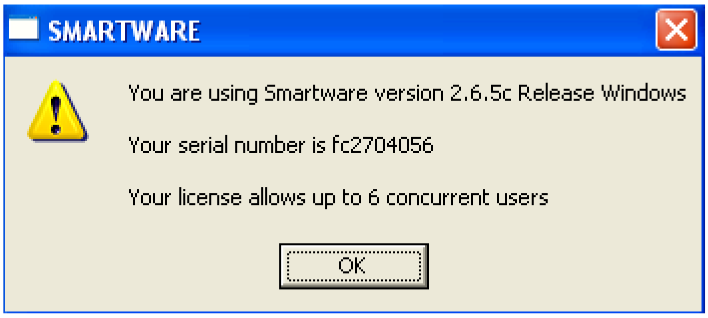
```
Data BG:       Data FG:        Title BG:       Title FG:
```

38. 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

SmartWare Occasionally we are asked to check how many licences for OPAS your computer has. We can do this by asking you to look in Windows Explorer. As not all our users are familiar with Windows Explorer, we have provided a menu option that will give you that information.

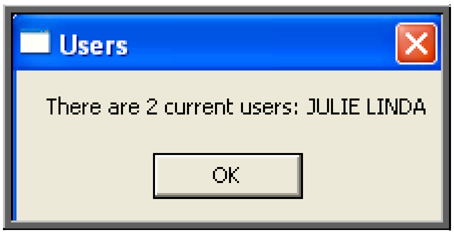


Version Number will show you which version of OPAS you are using and when it was installed. It will also give a brief summary of the changes made in that version.

39. 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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