

Orders

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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.

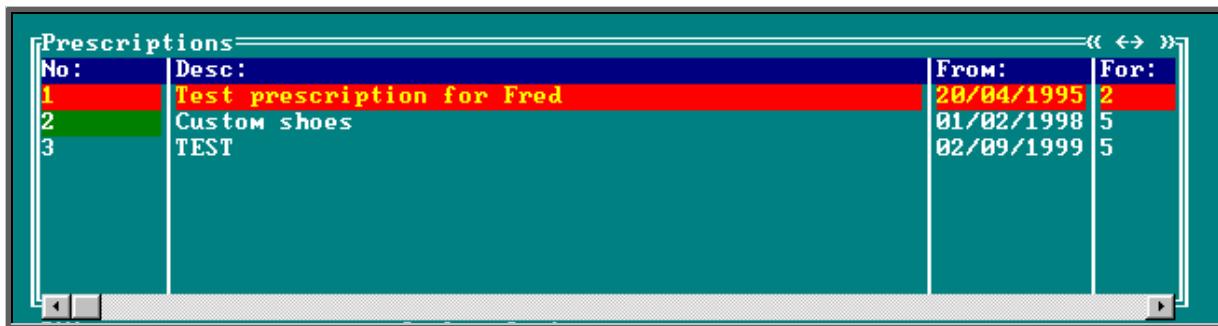
Menu: **Patients**

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

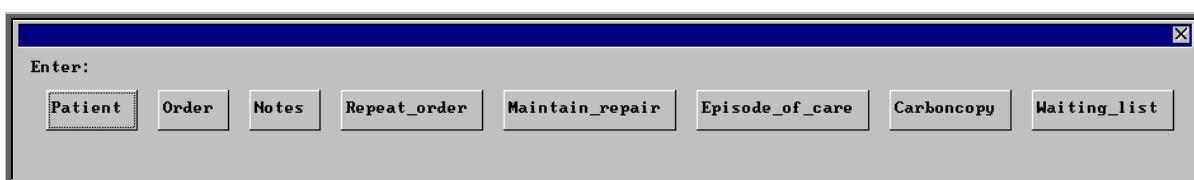
If you are not using prescriptions move onto step 2

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 **AM**, **PM** or **Evening** 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	DESCRIPTION
A014	ADDITIONAL CHARGE FOR BRIDGED OR ARCHED 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 than enter the whole order from scratch, enter a repeat order. Repeat orders is not an available option for those using prescriptions where each order has to be linked to a valid prescription when raised.

Menu: Patients

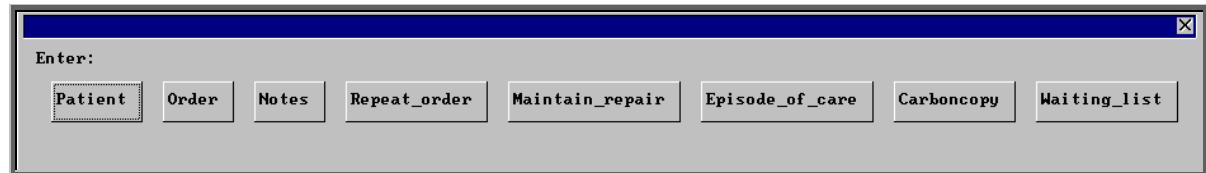
Find the patient who you wish to add a repeat order for.

Firstly, select which of the patients previous orders you would like to repeat. To do this, press the ‘arrow’ icon  (**PgDn**) so that you can see the order table. Select the relevant prescription by clicking on it with the mouse so that the green highlight appears. (Alternatively press **Alt-T**, select Order and move down the list with the arrow keys.)

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



Now click on the ‘enter’ icon  (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.



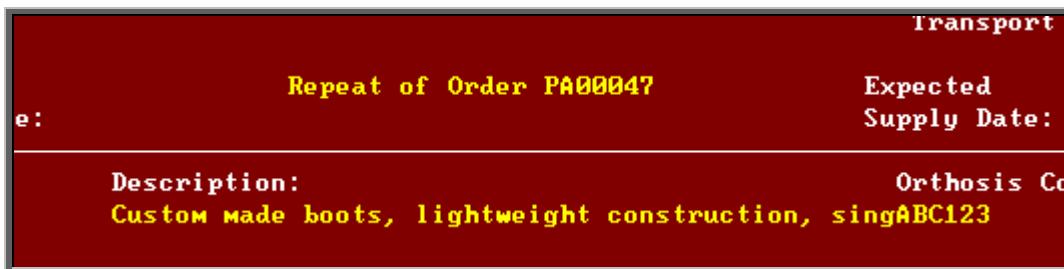
Click on Yes to continue.

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.



(**F6**)

Use the ‘arrow’ icon  (**F6**) to find the order you wish to edit, and then click on  ([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	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.

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.

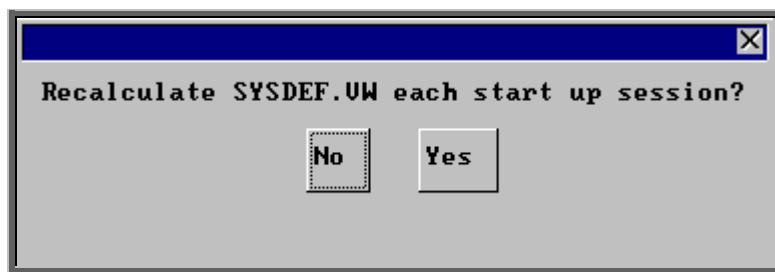
There is also the facility to e-mail orders direct to the supplier as they are raised ([see Orders - Note 11. E-mailing orders](#)).

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

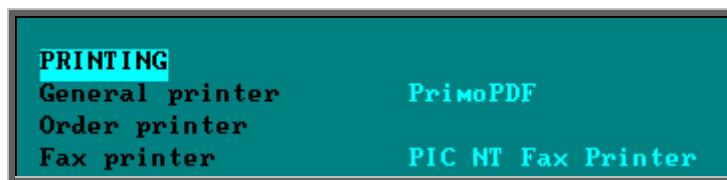
click on the 'update' icon (Edit, Update).

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

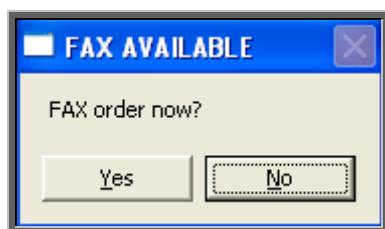
If you wish to fax orders to all suppliers then leave this screen blank. Otherwise, specify those suppliers you wish to fax to by adding them in this screen.

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

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

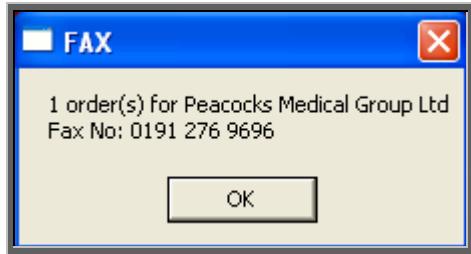
That supplier will be added and the pop-up list will appear again to choose another supplier. Continue to select suppliers until you have specified all those that you wish to fax to. Then press **Esc** to remove the pop-up list and then press **Esc** twice more to come out of the **Fax** screen.

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.

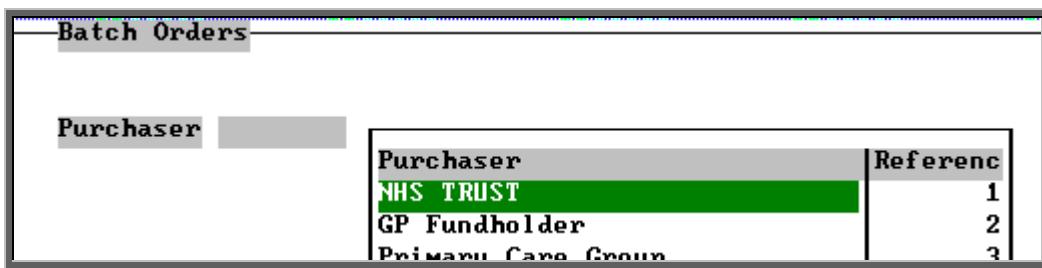
7. Printing/Faxing orders in batch

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.



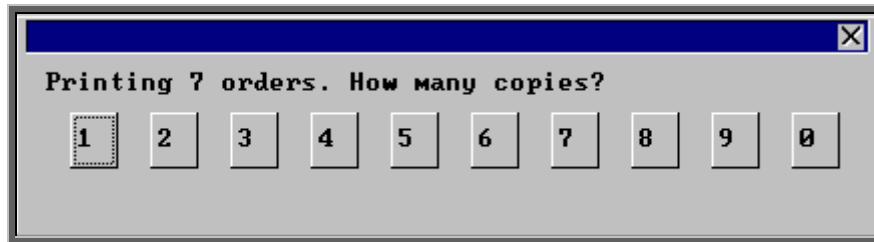
If you want to print all orders for all purchasers, simply press **Esc** at this screen.

Menu: History – Orders

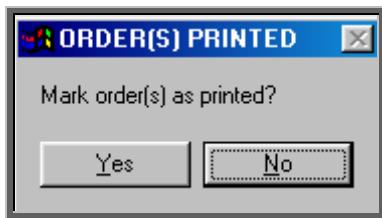
a) Printing to the printer

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.**

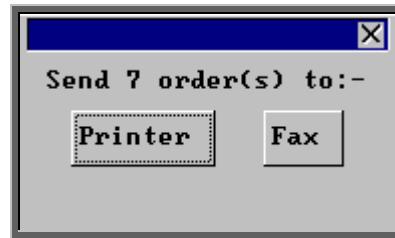
b) Faxing orders direct to suppliers

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**)

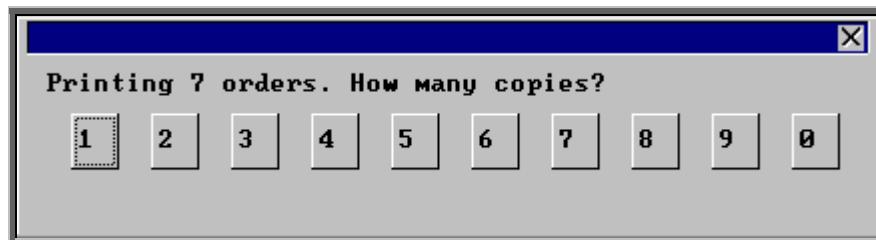


Click on the 'print' icon (File, Print) and then select **Orders** from the print menu.

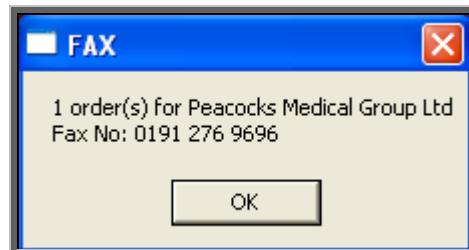
The system finds those orders that have not yet been printed and asks whether you wish to print or fax them.



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.

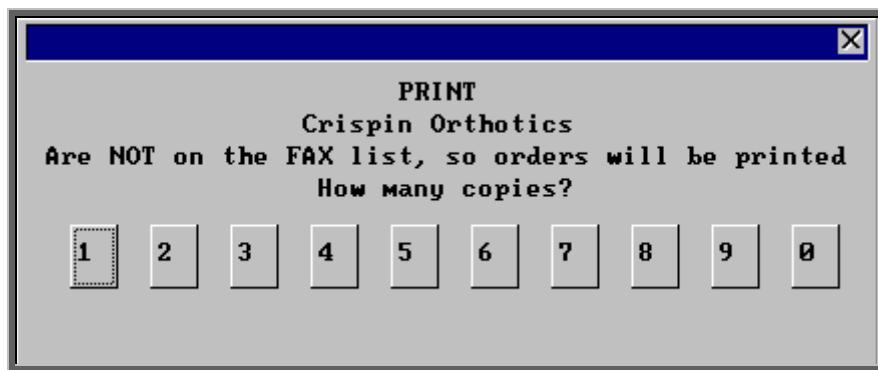


On clicking **OK**, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

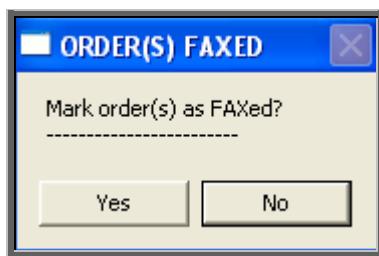
The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should 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.

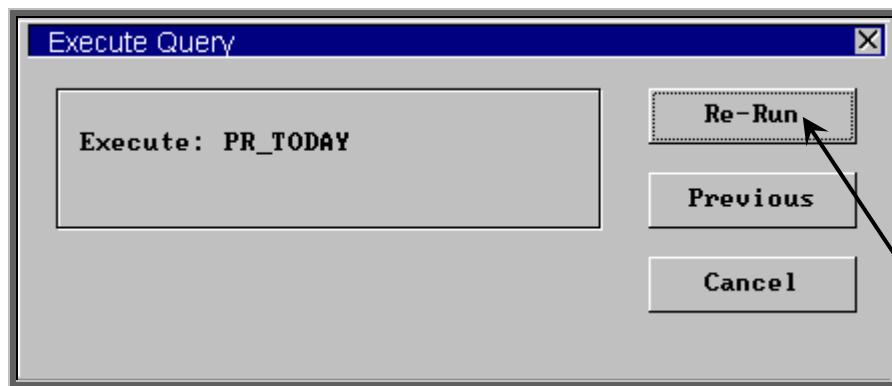
Menu: History – Orders

Click on Data and then Query

Click on This_view

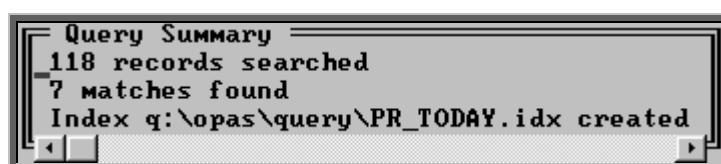
Using the down arrow key move the green highlight until it is on **PR_TODAY**

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.

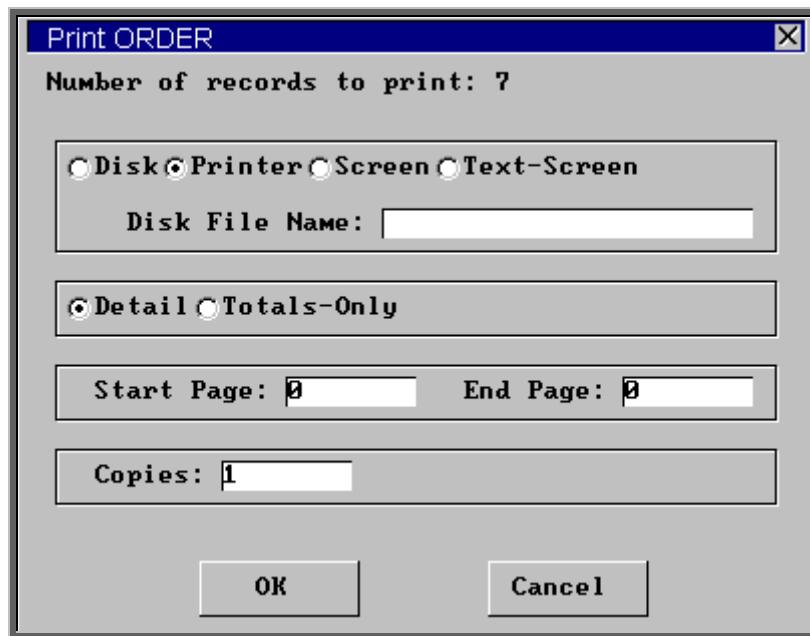
Press **Esc** once to remove the Query Summary box. The only orders you can see on the screen now are those that you need to reprint.



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

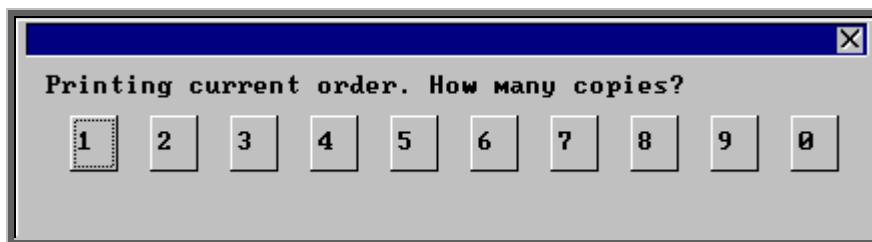
Find the patient whose order you wish to print.



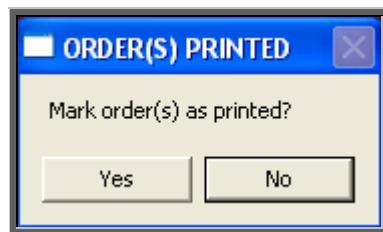
Click on the 'orders' icon  (Goto, History, Current) to show the current orders for that patient.



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)

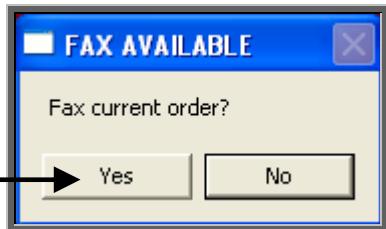
Menu: Patients

Find the patient whose order you wish to fax.

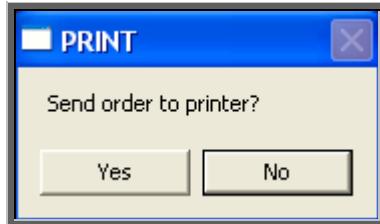


Click on the ‘orders’ icon (Goto, History, Current) to show the orders for that patient.

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

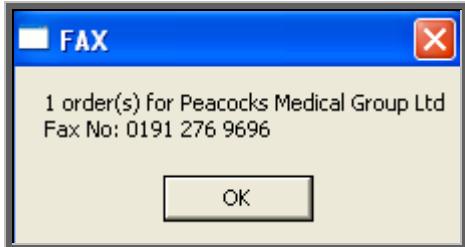


The above prompt will appear. If you do not want to fax the current order, and say No, the following prompt will appear.



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

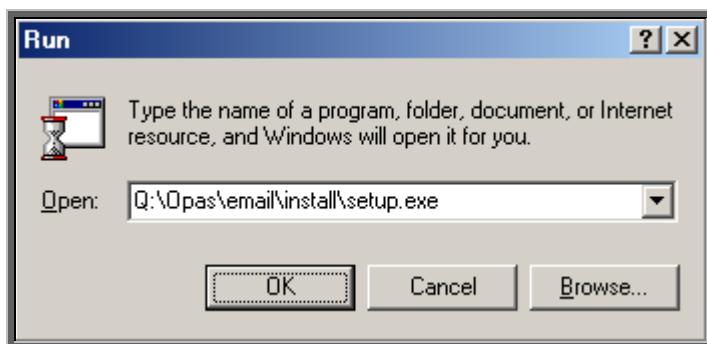
Step 1. Installing the e-mail daemon

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.

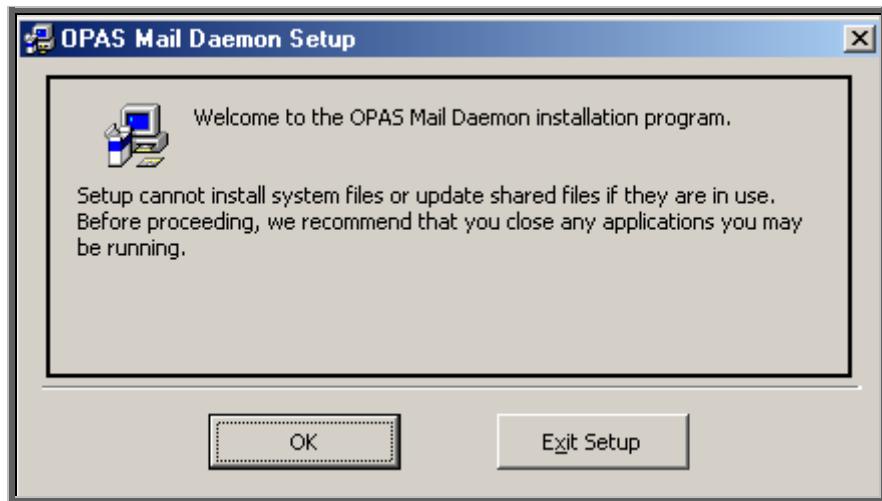


Use the **Run** option on your Start button to select Q:\Opas\email\install\setup.exe.

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.

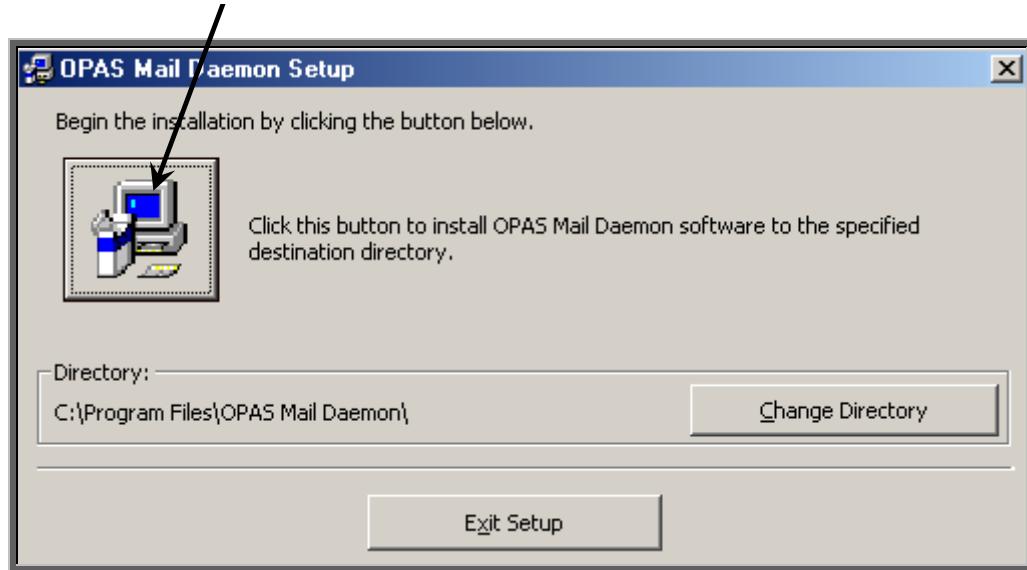


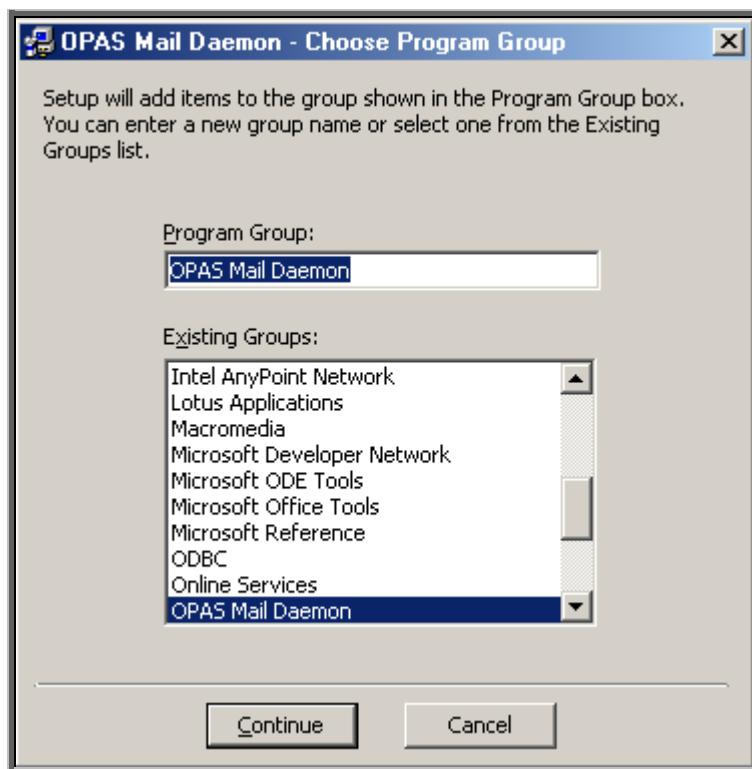
Click on OK to continue.



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.

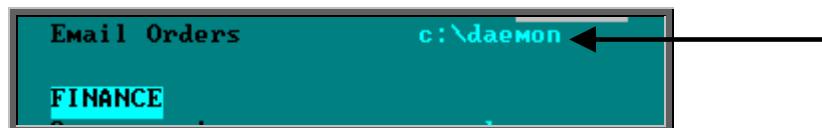


Click on OK.

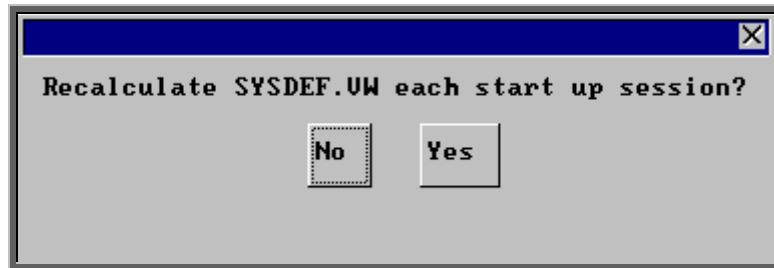
Don't forget – this needs to be done on each computer that you want to e-mail orders from.

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\.

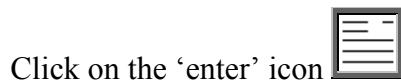


Press **Ctrl-Enter** to save the changes made. The following prompt will appear. Press the **Enter** key.



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

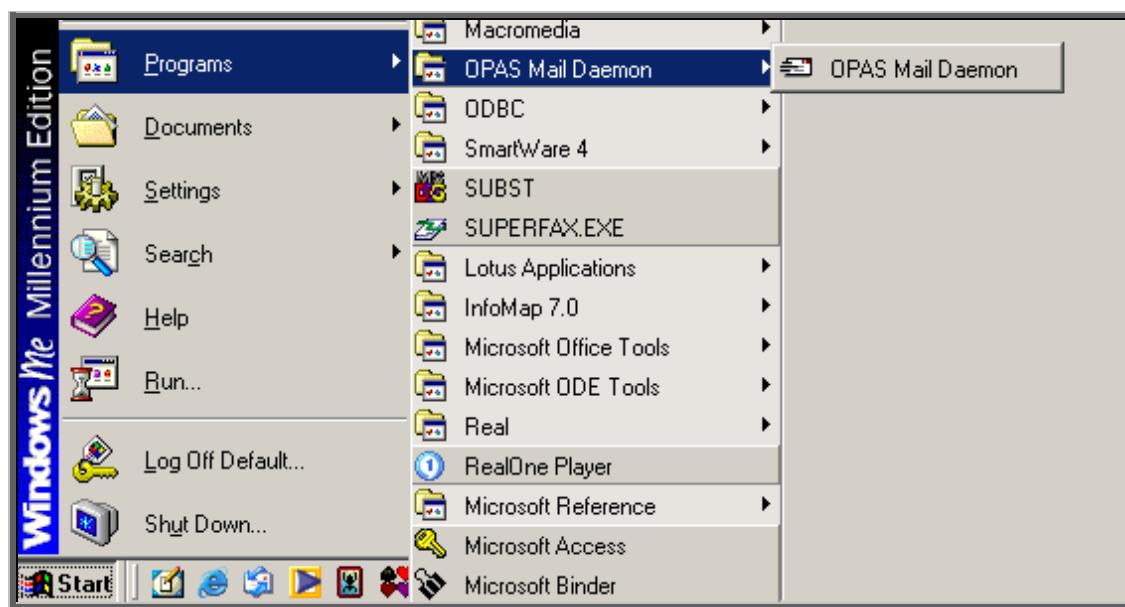
Address: enter the e-mail address for the supplier

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

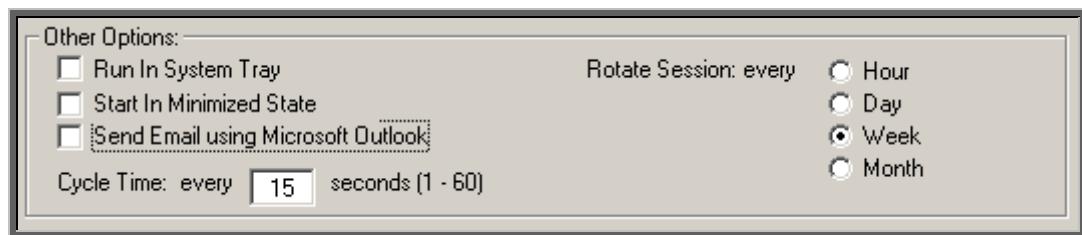
Step 1. Switching on the OPAS daemon.

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.

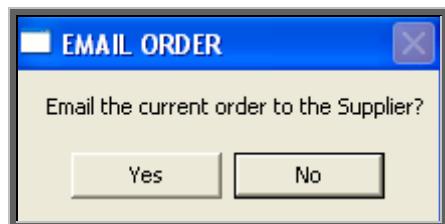
The order will be marked at the bottom with the date it was e-mailed. The printed date remains blank, which means that the order will be printed when printing orders in batch, but it will have a banner on it indicating that it is a confirmation of an e-mailed order. If you would prefer that e-mailed 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.

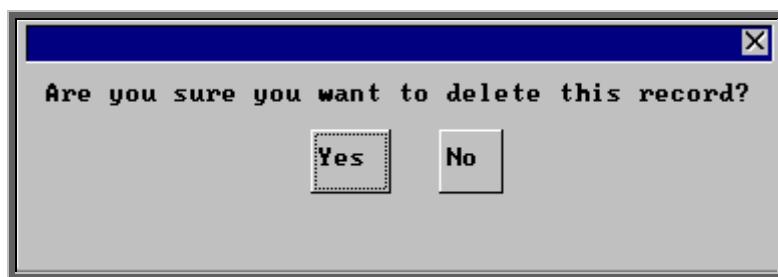
Note: Orders can only be e-mailed to suppliers that have been set up in **Utilities – Choices – History – E-mails**.

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.

Printed email	Ward
Reason for cancelling 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.)

Date	Action:	GRN	Reason
17/06/2008	C ancelled		order added to wrong patient
09/10/2007	O rdered		

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.

History	
Hospital No	Patient
NTORUS0077	MRS MURIEL SELBY
Purchaser	Date of Or
1 NHS TRUST	27/04/2008
Supplier	Pro
144 Crispin Orthotics	Dat
Purchase Card:	29/
Description Shoes	

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

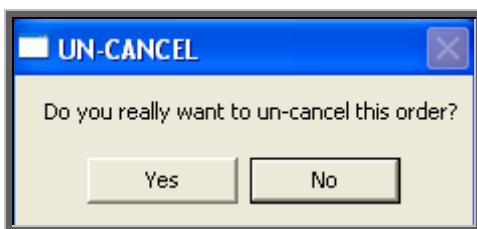
If you want to permanently remove the order from OPAS so that there is no longer any record of it, this can be done by clicking Edit, Krunch.

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.

email	
Reason for un-cancelling order:	

Date	Action:	GRN	Reason
17/06/2008	Uncancelled		wrong order cancelled
17/06/2008	Cancelled		order raised for the wrong patient
09/10/2007	Ordered		

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

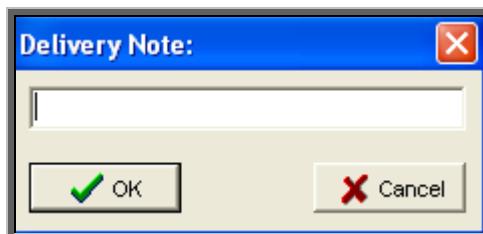


Find the relevant order and then click on the ‘goods in’ icon (Goods, In).

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.

‘A’ entered in the **ACO** field

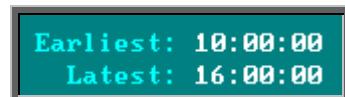
‘A’ is entered in the **ACO** field when the patient requires an appointment to be allocated when the goods have been received. Therefore, when you select Goods -

In, OPAS will search for the next available appointment based on the criteria entered on the order, i.e.

- length of appointment
- clinic selected
- Clinician selected (optional)
- day selected (optional)
- Morning/Afternoon/Evening appointment selected (optional)

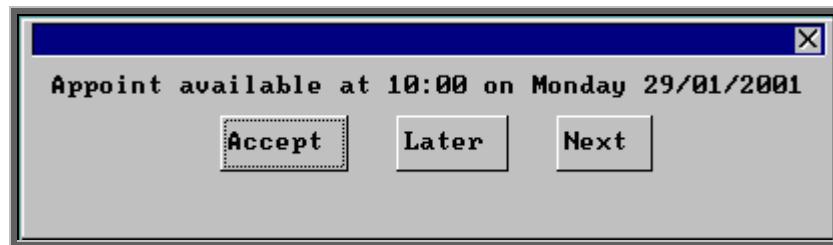
and also information held on the patient record

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**

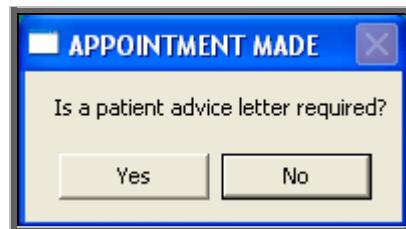
If you select Later and/or Next two more options become available.



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.

Order No	Hsp Ord No
PA00024	
ss	Received 30/11/2007
Action	Appoint 10/12/2007
2007 I	Supplied
	status In stock
osis Code ABC123	Custom Footwear

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.

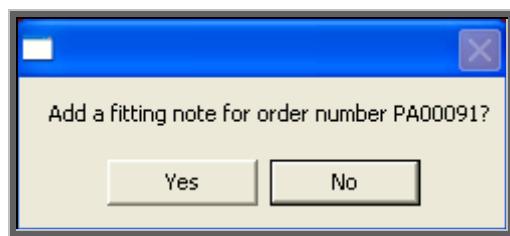
Order	Date	A	Action:	GRN	Reason
PA00146	04/08/2008	H	old		Patient awaiting surgery
PA00146	21/07/2008	O	rdered		

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.

Paydate Printed 01/04/2008 email	Technician: Ward	GPref PCG:
Fitting Notes: Date: 01/04/2008 By LINDA Fitting Note: The left shoe needs to altered so that the heel is		

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**.

<p style="text-align: center;">New NHS Trust FITTING NOTES</p>			
Greens Footwear Ltd 868 Osmaston Road Allenton Derby DE24 9AB	Order No.	PA00099	
	Order Date	19/04/2008	
	Job No.	4330007333	
PATIENT 12345QWERTY	Clinic	Orthotic Clinic	
MR KELVIN BLOGGS	Ward	Ward 1	
Consultant Mr Surgeon	Cost Code	111111	
Directorate PCT	Cost Centre	4199	
<hr/>			
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.

Returns

Order 00104

Action R

Date 16/06/2008

who : LINDA

GRN [redacted]

Reason

New Expected Date: 30/06/2008

- 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**.

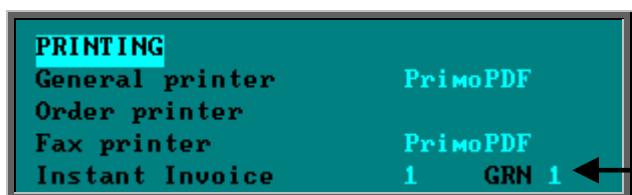
Below is an example of a goods return note:

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	Cost Code	ABC123	
Directorate PCT	Cost Centre	4199	
Schedule	Description	Qty	
A135-80103BK	OPAL PODIABET SHOE 80-103 BLACK Sz 35	1	
<hr/>			
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**).

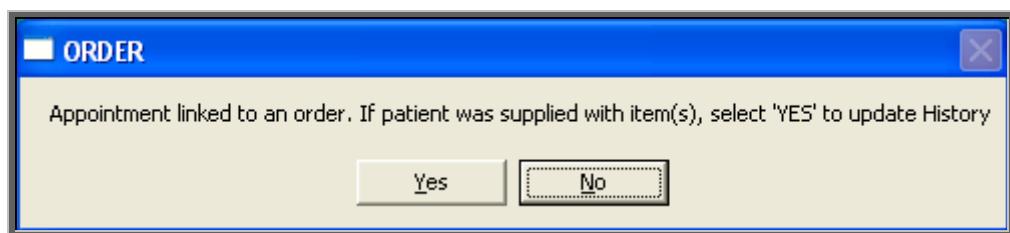
18. Supplying an order

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.

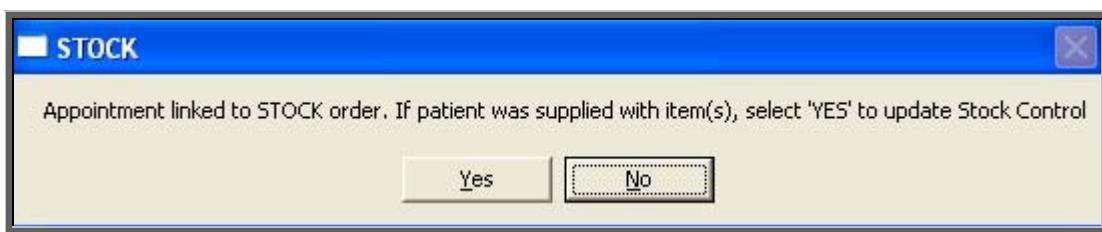
a) Through the appointment

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.

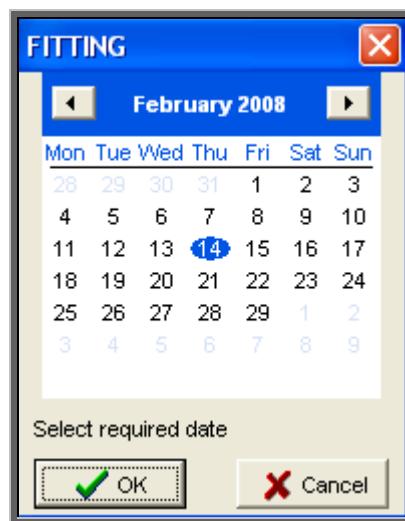
Today's date will be entered into the *Supplied* field and the *Status* changed from In Stock to Supplied.

Purchase Order No	Cross Ref or Hsp Ord No
PA00132	
ss— 2008 Action S	Received 25/06/2008
	Appoint
	Supplied 26/06/2008
	status Supplied
hosis Code 111111 Other	

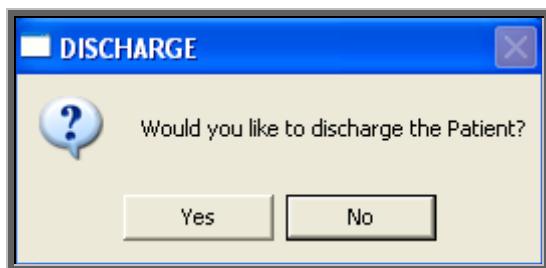
If an order that is linked to a care episode is marked as **Supplied**, you will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



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.



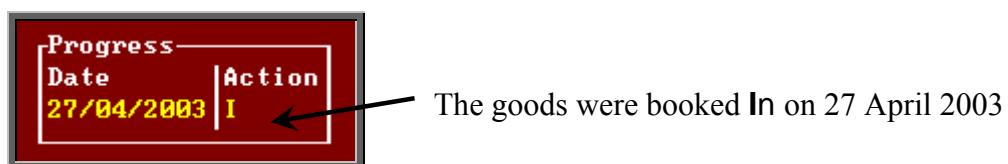
If Yes is selected, then the fitting date selected will also be entered into the Discharge: field on the care episode.



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 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.

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

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 their name will be highlighted in red on the order/invoice.

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

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.**

A screenshot of a terminal window with a green header bar. The main area contains the text "Ending Schedule No." followed by a blue rectangular input field. Below it, the text "Starting Schedule No = A1a" is displayed.

- 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.

A screenshot of a terminal window with a green header bar. The main area contains the text "Starting Date: / /" followed by a blue rectangular input field. Below it, the text "(DD/MM/YYYY, or press ESC to use all dates)" is displayed.

Then you will be asked to enter the **Ending Date:** of the date range to be analysed.

A screenshot of a terminal window with a green header bar. The main area contains the text "Ending Date: / /" followed by a blue rectangular input field. Below it, the text "Starting Date = 01/01/2000" is displayed.

Then you will be asked to enter the starting **Supplier Code.**

A screenshot of a terminal window with a green header bar. The main area contains the text "Starting Supplier Code." followed by a blue rectangular input field. Below it, the text "(Leave blank to use all suppliers)" is displayed.

- If you want to analyse a range of suppliers, enter the starting supplier code of the range.
- If you want to analyse one supplier, enter that schedule code.
- If you want to analyse all suppliers, leave this blank (and the next prompt will not appear).

Then you are asked for the **Ending Supplier code.**

Ending Supplier code .	██████████
Starting Supplier Code =	075

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

Then you are asked for the Purchaser code.

Purchaser code .	██████████
(leave blank to include all purchasers)	

- If you want to analyse one purchaser, enter that purchaser code.
- If you want to analyse all purchasers, leave this blank.

OPAS will then find all the order lines that matched the criteria entered, and show the results on screen in spreadsheet format.

1	2	3	4
1 ALL SCHEDULES			
2 ORDERS DATED: 01/04/2008 - 30/04/2008			
3 ALL SUPPLIERS			
4 ALL PURCHASERS			
5			
6 SCHEDULE	Qty		
7	2.00		
8 A135-80103BK	3.00		174.99
9 A144A-70500BU	1.00		117.49
10 CC30	1.00		145.05
11 D5/C/8	1.00		53.46
12 SCL	2.00		145.05
13 STEST4	1.00		39.98
14	-----		
15	11.00	1,426.40	1,676.02
16	=====		
17			
18 Printed 29/6/2008 by LINDA			
19			

DETAIL ANALYSIS

 Print this spreadsheet?

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.

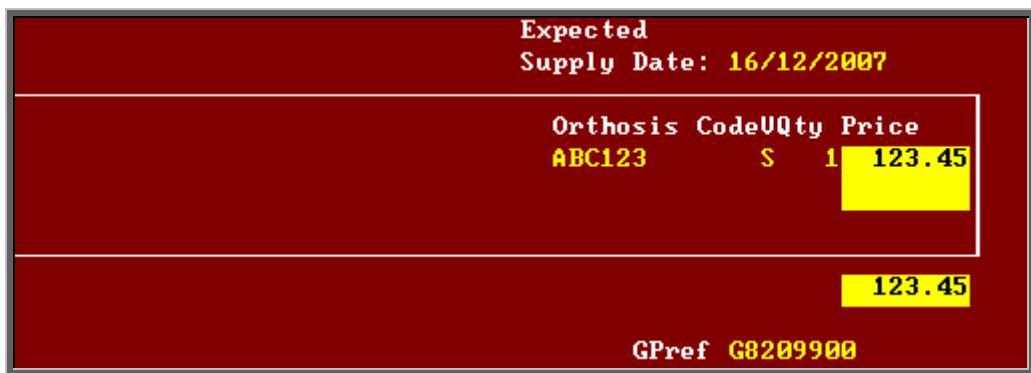


If you need to create more currencies or update exchange rates on current currencies, go to Utilities – Choices – History – Currencies.

Ref:	Currency	Symbol	P pos:	Exchange	
1	Sterling	£	B efore Amount	1.0000	
2	Euro	€	B efore Amount	1.4500	
3	US Dollars	\$	B efore Amount	2.0500	
4	Yen	¥	A fter Amount	225.6700	

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.

CODE	078
NAME	Peacocks Medical Group Ltd
OSN	
OPS	
Blanket	4330007333
Copies	

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.

Purchase Order No	Cross Ref or Hsp Ord No
PA00139	4330007333
ss Action	Received Appoint Supplied status On order
2008 0	

Invoice	Dated:
Call off 4330007333	
Canceled	

24. Deceased patients

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

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

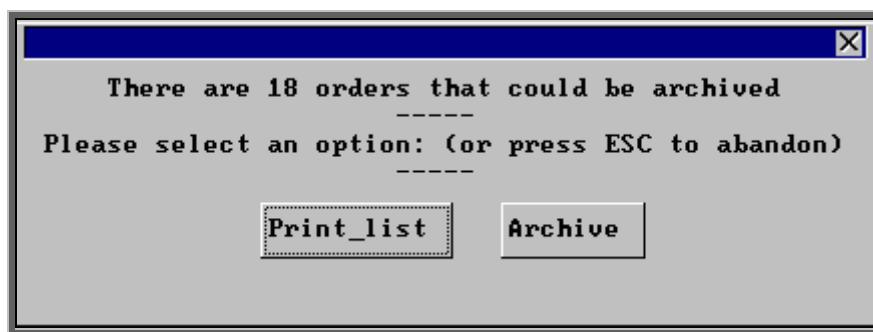
Menu: History – Invoices

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



```
View Expression
d days([Date of Order])<days(addmonths(today,-18)) and dfq()
```

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

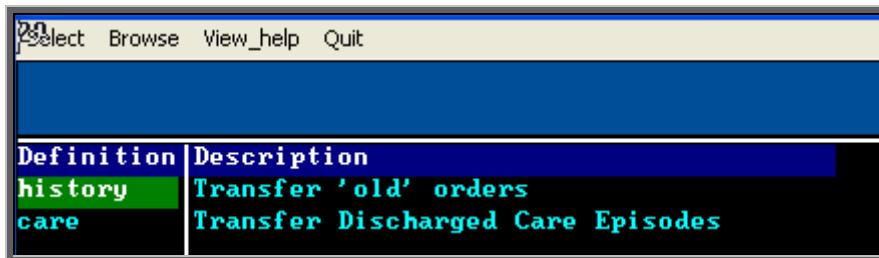
press **F10** twice

- select OK, and then Quit.

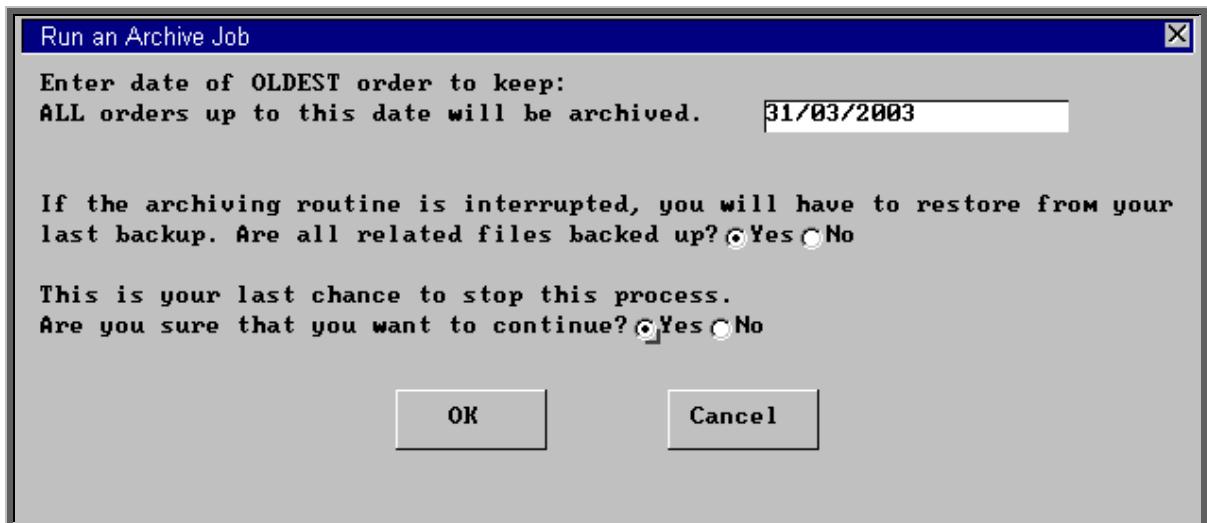
Option 2

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.

```
Error Report - Archive job : history
Directory : <empty>

Query for archive records started at 14:23:39

Partial archive option was used.

Variable settings:

$Sanswer1 = 01/01/2005
$Sanswer2 = 0
$Sanswer3 = 0
$Sdefault1 =
$Sdefault2 =
$Sdefault3 =

Performing query.
1 found. Query ended at 14:23:39
Transferring data from detail to detarc.
Started at:14:23:39
Settings:
      Move
      Searching for >1 Match
      Appending all matches
Finished appending 1 records at 14:23:39.
```

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.

OPAS Reports Selection Criteria Screen				
Purchaser	No	Yes	One	Range
Directorate	No	Yes	One	Range
Referrer	No	Yes	One	Range
Orthosis Code	No	Yes	One	Range
Supplier	No	Yes	One	Range
GP	No	Yes	One	Range
Post Code	No	Yes	One	Range
Dates	All	One	Range	
Using	Ordered	Received	Supplied	Invoiced Purchase_Invoice Paydate
Continue? No Yes				

Purchaser

Select

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

Purchaser	No	Yes	One	Range	1	NHS TRUST
Directorate	No	Yes	One	Range		

Range if a range of Purchasers are to be included in the report. Use the space bar on your keyboard to move the highlight from No to Range and press **Enter**. A pop-up list will appear for you to select the first Purchaser in the range. Having selected the first Purchaser, this will be entered on the selection screen and the pop-up list will stay for you to select the last purchaser of the range. Your selection will appear on the screen.

Purchaser	No	Yes	One	Range	1	NHS TRUST
					to 2	GP Fundholder
Directorate	No	Yes	One	Range		

Directorate, Referrer, Orthosis Code, Supplier, GP and Postcode.

Apply the same selection procedure as with Purchaser to select No, Yes, One or Range.

Dates

Select

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

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.

Dates	All	One	Range	/ /
--------------	-----	-----	-------	-----

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.

OPAS Reports Selection Criteria Screen

Purchaser	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range		
Directorate	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> One	<input type="radio"/> Range	Trauma & Orthopaedic	
Referrer	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range		
Orthosis Code	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input checked="" type="radio"/> One	<input type="radio"/> Range	ABC123	Custom Footwear
Supplier	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range		
	<input type="radio"/> GP	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range	
Post Code	<input type="radio"/> No	<input checked="" type="radio"/> Yes	<input type="radio"/> One	<input type="radio"/> Range		
Dates	<input type="radio"/> All	<input checked="" type="radio"/> One	<input checked="" type="radio"/> Range		01/04/2007 to 31/03/2008	
Using	<input type="radio"/> Ordered	<input type="radio"/> Received	<input type="radio"/> Supplied	<input type="radio"/> Invoiced	<input type="radio"/> Purchase_Invoice	<input type="radio"/> Paydate
Continue? <input type="radio"/> No <input checked="" type="radio"/> Yes						

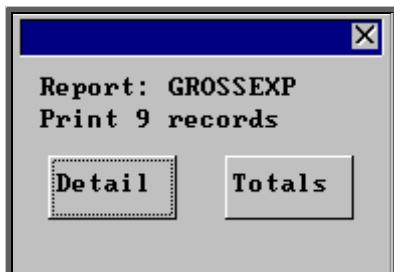
Once you have selected Yes to continue, OPAS will search for all those orders that match the criteria selected. If no matches are found, the following message will appear.



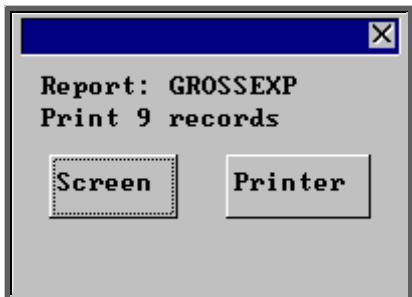
If orders have been found that match your criteria then this **Reports** menu will appear.

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.

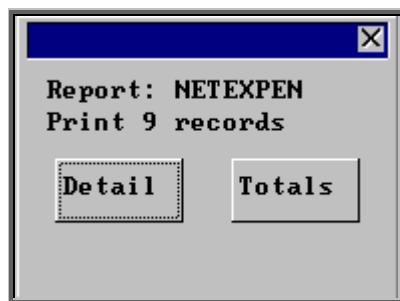
Below is an example of the **Gross Expenditure** report selecting **Detail**.

New NHS Trust			
Directorate: Trauma & Orthopaedic			
Ordered 01/04/2007 - 31/03/2008			
Hospital No	Order No	Patient	Gross:
N38711265	VGI S16	MR B PEACOCK	79.25
N38711265	VGI S17	MR B PEACOCK	39.63
		Total for Directorate	<u>118.88</u>
		Count	2

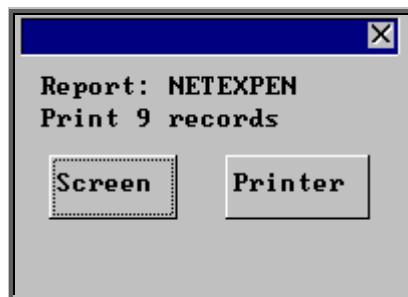
The report layout (**grossexp.dfr**) can be altered to your requirements. Please contact the OPAS helpdesk.

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				<u>101.18</u>
			Count	2

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

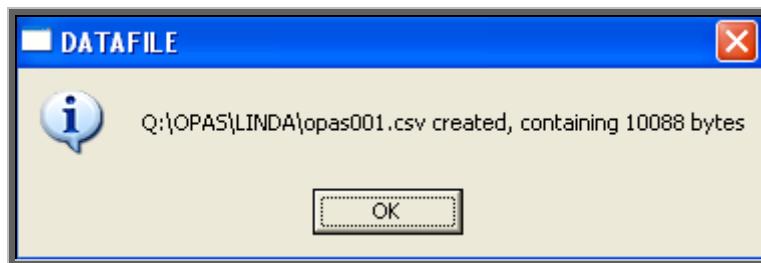
Datafile

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

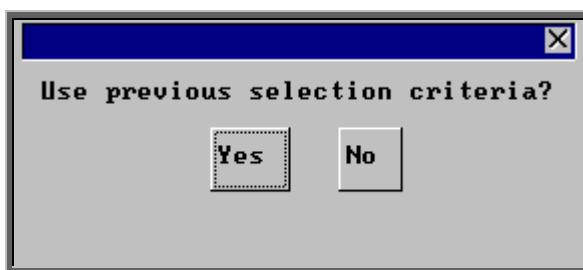


A comma separated variable file will be created in your personal directory.

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
2	G00366	25/06/2002		S	ADLER
3	G00368	27/06/2002		DA	HANLEY
4	G00370	12/07/2002	MR	MARTIN	CRAVEN
5	G00369	12/07/2002		HJ	CARNE
6	G00371	25/07/2002	MR	FRED	BLOGGS
7	G00375	11/09/2002	MR	KELVIN	BLOGGS

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.

