

Patients

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1. Introduction

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

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

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

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


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

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

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

Patient Screen

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

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

Patient Screen (Long)

| File Edit Data Appointments Dormant Goto Mailing Message Paslink Sort This | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|----------|----------------------|----------------|--|--|--|--|--|------|-------|----------|------------|--|--------|------------|----------|--|------------|----------|-----|------|----------|------------|--------|-----|-------|--|-------|-----|-------|-----|-------|------------|-----|-------|----------------------|----------------|-----|-------|-------|------|--|--|--|--|-----|-----|------------|----------|------|-----|----------------|---------|
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Patients</p> <p>Registered: 25/02/2000 By ROOT Last Update: 24/02/2004 By LINDA NHS No 999-999-9999 D O B 11/11/1924 age 79</p> <p>Hospital No 4454544 Title Forenames Surname D O B MR JAMES HERRIOT Sex M Ethnicity</p> <p>Address 21 James St Mailing 21 James St Address DOR YAD Town Jamestown Jamesstown YAD County Middlesex Middlesex Post Code JT1 2ER JT1 2ER Notes:</p> <p>Home Phone 01234 567890 Mobile: Work Phone 01234 654321 Fax: Email james.herriot@hotmail.com G P PCG 5M6 G9003459 GIBSON PW</p> <p>Purchaser 1 NHS TRUST ConsRef: 2 Clinician Earliest: 10:00:00 Referrer Direct Access GP Directorate PCT Latest: Private Patient N Inpatient N Transport No transport required Exempt: Until: Review Weight: Comments Height: Alias Activity:</p> <p style="background-color: red; color: white; text-align: center;">All patient notes MUST be treated as confidential</p> <p>Medical Notes</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Notes</th> <th>Category</th> </tr> </thead> <tbody> <tr> <td>25/08/2000</td> <td>Hospital number changed from TEMP00011 at 20:37:50</td> <td>UPDATE</td> </tr> <tr> <td>05/11/1997</td> <td>Diabetic</td> <td></td> </tr> </tbody> </table> <p>Orders</p> <table border="1"> <thead> <tr> <th>Date of Or</th> <th>Order No</th> <th>Sup</th> <th>Desc</th> <th>Received</th> </tr> </thead> <tbody> <tr> <td>24/02/2004</td> <td>G00422</td> <td>048</td> <td>SHOES</td> <td></td> </tr> </tbody> </table> <p>Appointments</p> <table border="1"> <thead> <tr> <th>Date:</th> <th>Day</th> <th>Time:</th> <th>At:</th> <th>With:</th> </tr> </thead> <tbody> <tr> <td>22/10/2003</td> <td>Wed</td> <td>10:00</td> <td>Appliance Department</td> <td>Mrs Orthotiste</td> </tr> </tbody> </table> <p>Prescriptions</p> <table border="1"> <thead> <tr> <th>No:</th> <th>Desc:</th> <th>From:</th> <th>For:</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>DNAs</p> <table border="1"> <thead> <tr> <th>On:</th> <th>At:</th> </tr> </thead> <tbody> <tr> <td>22/10/2003</td> <td>10:00:00</td> </tr> </tbody> </table> <p>Carbon Copies</p> <p>DNAs 1</p> <p>Addresses</p> <table border="1"> <thead> <tr> <th>Add:</th> <th>PC:</th> </tr> </thead> <tbody> <tr> <td>42 Main Avenue</td> <td>JT1 2ER</td> </tr> </tbody> </table> | | | | | | | | | | Date | Notes | Category | 25/08/2000 | Hospital number changed from TEMP00011 at 20:37:50 | UPDATE | 05/11/1997 | Diabetic | | Date of Or | Order No | Sup | Desc | Received | 24/02/2004 | G00422 | 048 | SHOES | | Date: | Day | Time: | At: | With: | 22/10/2003 | Wed | 10:00 | Appliance Department | Mrs Orthotiste | No: | Desc: | From: | For: | | | | | On: | At: | 22/10/2003 | 10:00:00 | Add: | PC: | 42 Main Avenue | JT1 2ER |
| Date | Notes | Category | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 25/08/2000 | Hospital number changed from TEMP00011 at 20:37:50 | UPDATE | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 05/11/1997 | Diabetic | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Date of Or | Order No | Sup | Desc | Received | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 24/02/2004 | G00422 | 048 | SHOES | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Date: | Day | Time: | At: | With: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 22/10/2003 | Wed | 10:00 | Appliance Department | Mrs Orthotiste | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| No: | Desc: | From: | For: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| On: | At: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 22/10/2003 | 10:00:00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Add: | PC: | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 42 Main Avenue | JT1 2ER | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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

| | |
|---------------|-----------------|
| Medical Notes | DNA's |
| Orders | Carbon Copies |
| Appointments | Address history |
| Prescriptions | |




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



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

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

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




| | | |
|-----------------|---|---|
| Medical Notes |  | (or <u>G</u> oto, <u>N</u> otes) |
| Orders |  | (or <u>G</u> oto, <u>H</u> istory, <u>C</u> urrent) |
| Appointments |  | (or <u>A</u> ppointments, <u>C</u> urrent) |
| Prescriptions | | (<u>G</u> oto, <u>P</u> rescriptions) |
| Carbon Copies | | (<u>G</u> oto, <u>C</u> opies) |
| Address history | | (<u>G</u> oto, <u>A</u> ddresses) |

Patient Screen (Short)

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


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

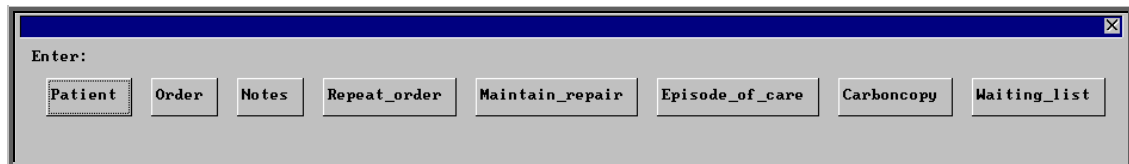
When you are in the 'short' version of the **Patient** screen, although you can not see the summary tables that are on the 'long' version of the Patient screen you can still access full details of the orders, appointments etc by choosing the relevant icon or menu option from the top of the screen.

- | | | |
|-----------------|---|---|
| Medical Notes |  | (or <u>G</u> oto, <u>N</u> otes) |
| Orders |  | (or <u>G</u> oto, <u>H</u> istory, <u>C</u> urrent) |
| Appointments |  | (or <u>A</u> ppointments, <u>C</u> urrent) |
| Prescriptions | | (<u>G</u> oto, <u>P</u> rescriptions) |
| Carbon Copies | | (<u>G</u> oto, <u>C</u> opies) |
| Address history | | (<u>G</u> oto, <u>A</u> ddresses) |

2. Entering a new patient

Menu: Patients

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



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

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

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

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

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

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

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

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

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

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


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

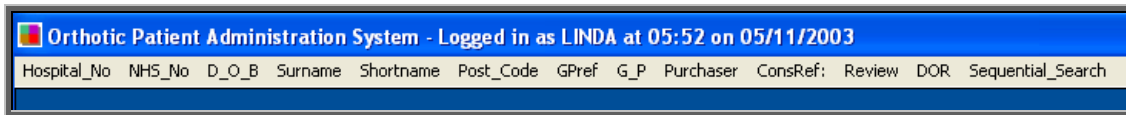
The **Patients** screen can be customised in order to control which fields have pop-up menus appearing automatically, and which fields you have to press the **Tab** key to access the pop-up menus. Also, if you mainly enter the same details in a field i.e. *County*, this field can be set to default to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

3. Finding a patient's record

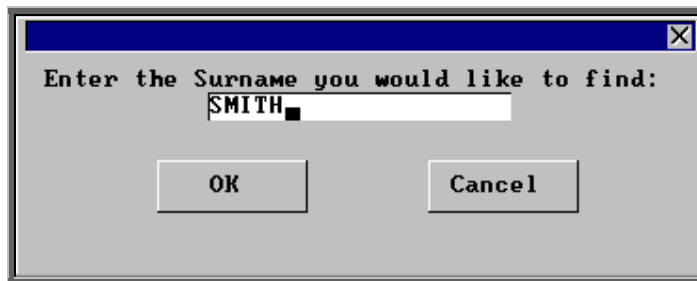
Menu: Patients



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




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



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

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

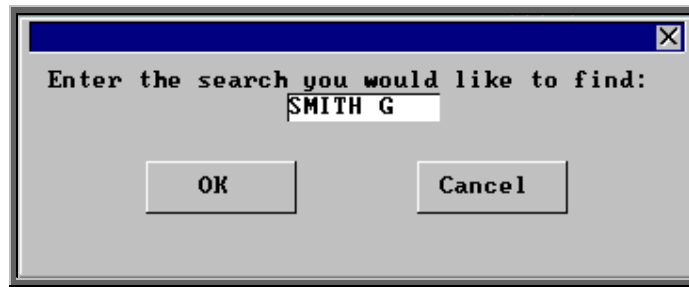


on the 'arrow' icon  (or **F6**) you can step through the patients with that surname until you find the patient you are looking for. Alternatively, select the 'browse' icon





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

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



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

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

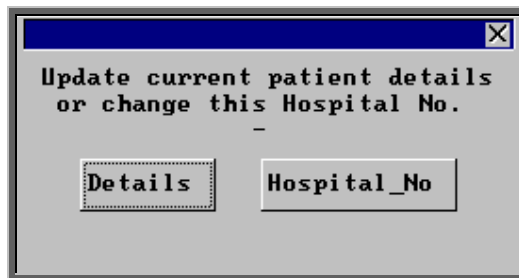
4. Amending a patient’s record

Menu: Patients

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



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



Details

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

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

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

Title
Ethnicity
GP
Purchaser
ConsRef (Referrer)
Clinician
Transport


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

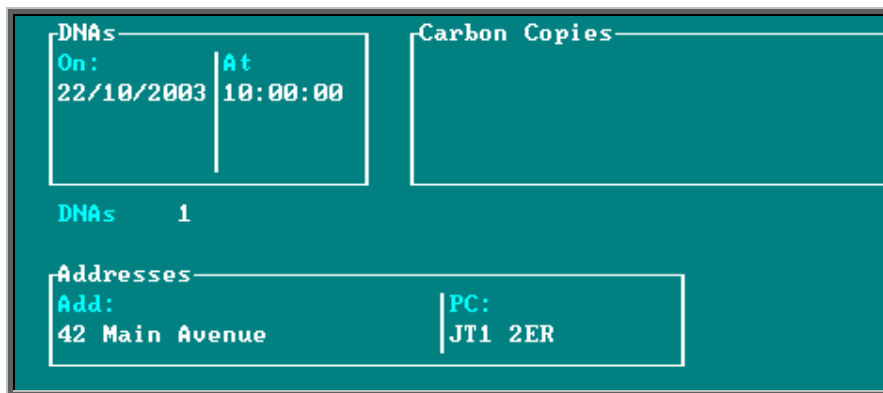
If any of the changes made are in the patient's address, you will be asked if you would like to keep the old address in the address archive.



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

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

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



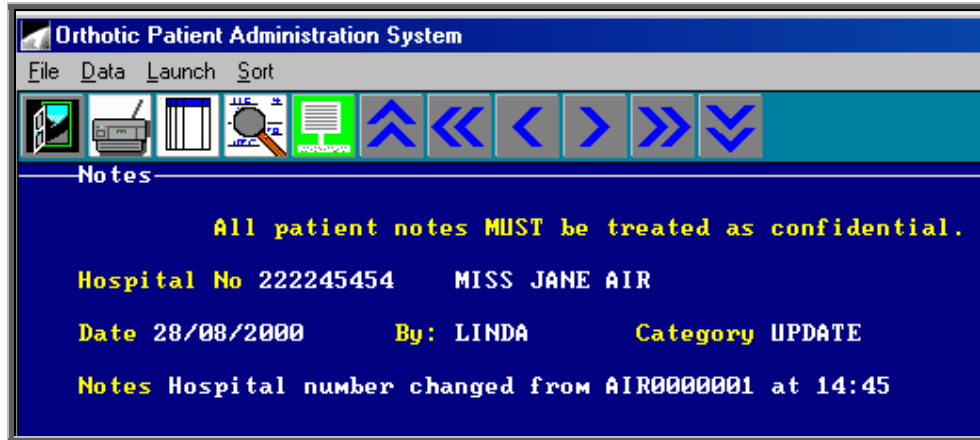
Hospital number

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

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

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

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



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



5. Changing the mailing address

Menu: Patients

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


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

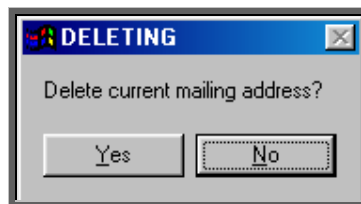
If a temporary mailing address is shown for a patient, that address is used for letters; if not, the permanent address is used.

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



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

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



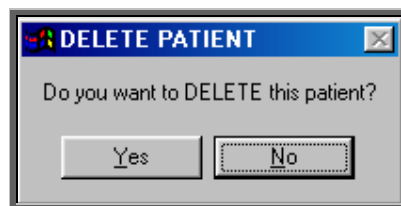
6. Deleting a patient

Menu: Patients

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



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




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

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

```

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


```

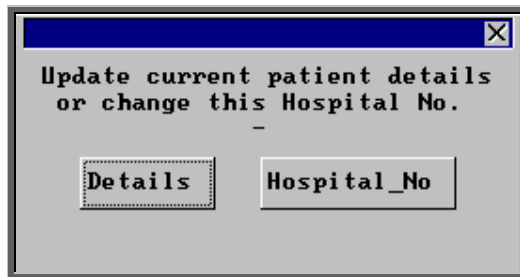
The patient remains in the file and, if deleted by mistake, can be undeleted by simply clicking on the 'delete' icon  (or Edit, Delete) again.

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

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

Marking a patient as deceased

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



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

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

```


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

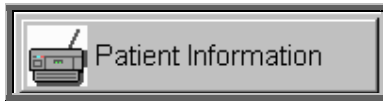
```

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

7. Printing options

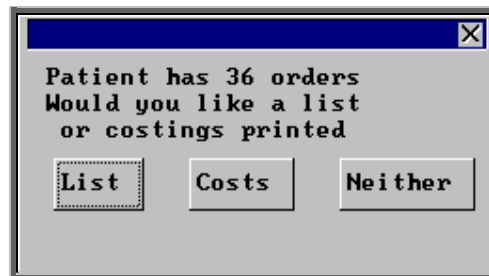
Menu: **Patients**

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



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

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



List

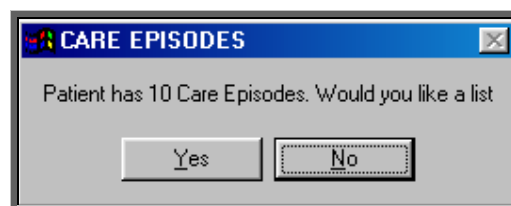
List prints a list of orders for that patient (Order number, Date of order and the general Description for that order).

Costs

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

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

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



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



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




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

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

How to print HSA5 and WF1 forms

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

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

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

Select **Mail Merge**

Click on This View at the top of the screen

Highlight the form you wish to produce

Click on Run



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




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

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

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


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

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

8. Prescriptions

Menu: Patients

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

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



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

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

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

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

Updating prescriptions

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



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

Cancelling prescriptions

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

Expired prescriptions

Prescriptions appear in a red banner once they have expired.

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


9. Adding an Order

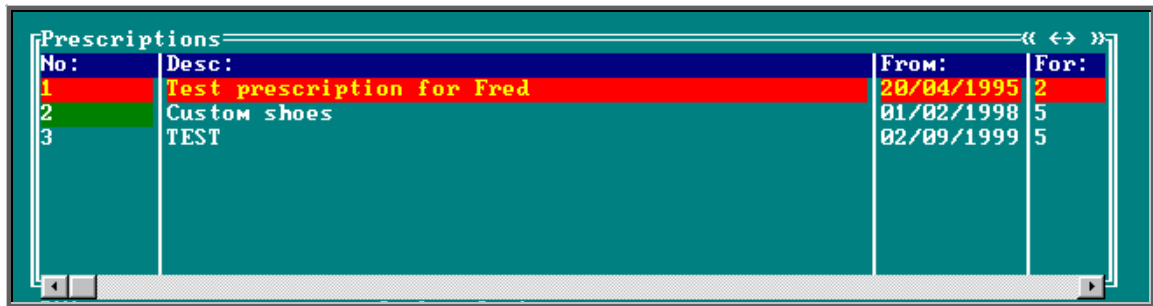
Menu: Patients

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


If you are not using prescriptions move onto step 2

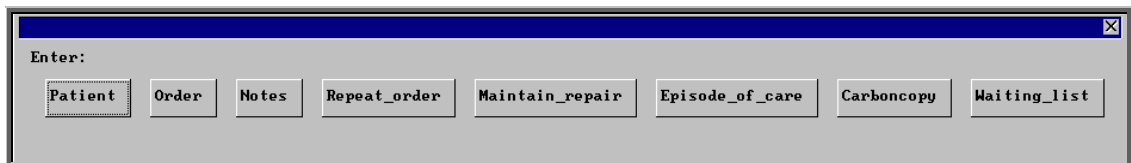
If you are using prescriptions you will then have to select which prescription this

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




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

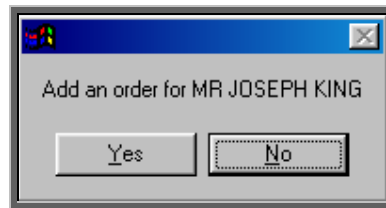
Click on the 'enter' icon  (or **Edit**, **Enter**) and the box below will appear.



Enter:

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

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



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

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

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

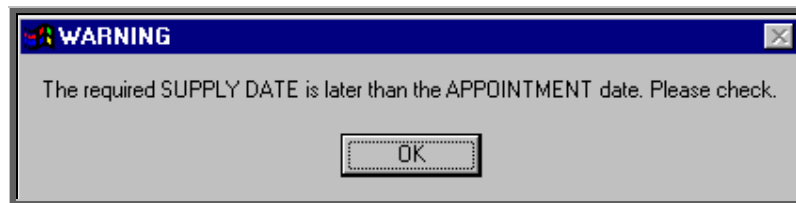
- | | |
|----------------------------------|---|
| <i>Hospital No</i> | Hospital No will be brought through from the patient record. |
| <i>Patient</i> | Patient name will be brought through from the patient record. |
| <i>Sex</i> | (M)ale or (F)emale will be brought through from the patient record.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

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

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

Select appointment

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



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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(V)AT

V shows the rate of VAT for that item, as

S standard
E exempt
Z zero-rated
R reclaim.

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

Qty

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

Price

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

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

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

Notes

Any additional information can be entered here.

Care Episode

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

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

- 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 – 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**.
- Fitting Note* This is a multiple lined field to enable extensive fitting notes to be entered.

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

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

10. Amending an order

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

1. From the patient screen

Menu: **Patients**

Find the patient whose order you wish to amend.



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



Use the 'arrow' icon (or **F6**) to find the order you wish to edit, and then click



on the 'update' icon (or **E**dit, **U**ppdate).

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

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


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

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

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

2. From History

Menu: **History - Orders**

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

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

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

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

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

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

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

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

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


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

11. Printing/Faxing orders in batch

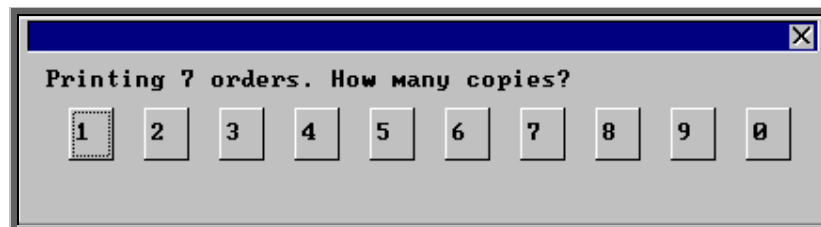
Orders are normally printed in batches (e.g. at the end of the day).

Menu: **History – Orders**

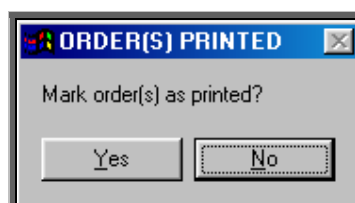
1. Printing to the printer

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

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



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




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

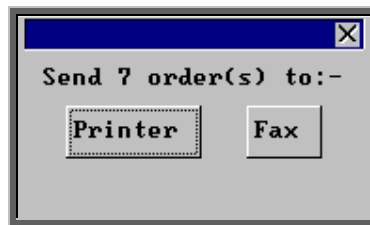
If you select **Yes**, when in fact the orders hadn't printed successfully, follow the steps in Note 3 below to reprint them.

2. Faxing orders direct to suppliers

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

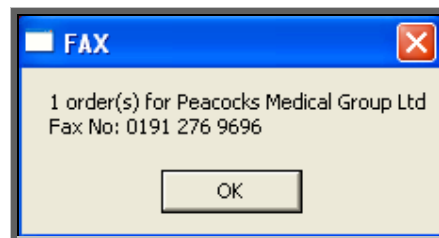
Click on the 'print' icon  (or File, Print) and then select **Orders** from the print menu.

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 continue as above by being asked how many copies you require.

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



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

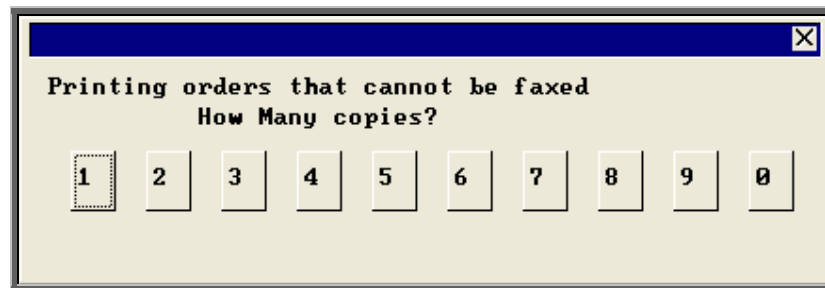
The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should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

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

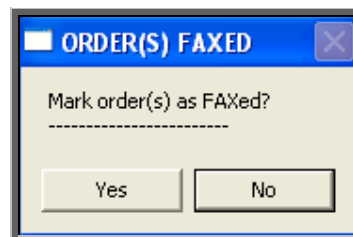
If orders are found for companies that are not set up for faxing (**Utilities – NSI – Fax see Utilities - Note 17. Choices - Fax**), the following prompt will appear.



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



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



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

3. Reprinting/Refaxing orders

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

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

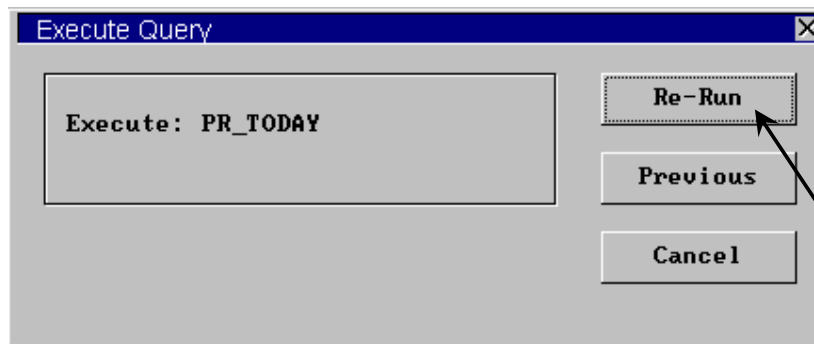
Menu: **History – Orders**

Click on Data and then Query

Click on This_view

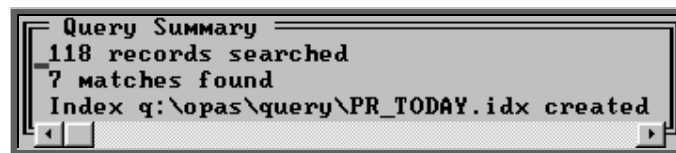
Using the down arrow key move the green highlight until it is on PR_TODAY

Click on Run




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

Click on Run or Re-Run.



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


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

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

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

Click on Run.

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

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

12. Printing orders as they are raised

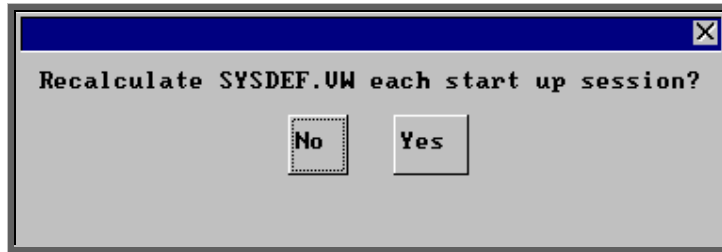
There is a switch in the system parameters that will result in orders being printed instantly i.e. as they are raised. This is an alternate method to batch printing ([see Patients - Note 11. Printing/Faxing orders in batch](#)). This function is not intended to be used if you are set up for faxing orders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

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

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

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

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




Press the **Enter** key.


13. Re-printing individual orders

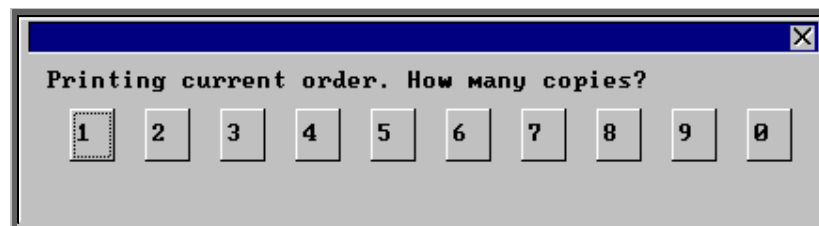
If you have lots of orders to print it is best to print them in batch ([see Patients - Note 11. Printing/faxing orders in batch](#)), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: **Patients**

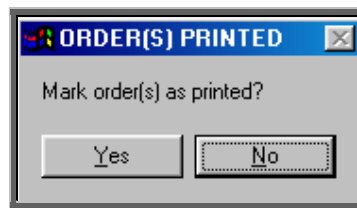
Find the patient whose order you wish to print.

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

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



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



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

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

14. Re-faxing individual orders

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

Menu: **Patients**

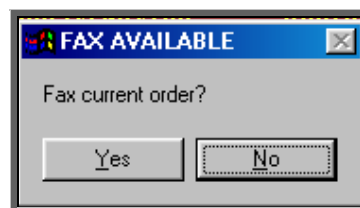
Find the patient whose order you wish to fax.



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

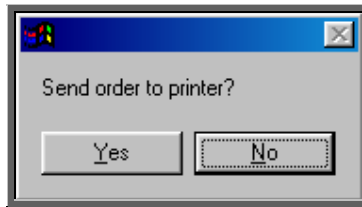


Find the relevant order, click on the 'print' icon (or File, Print), and select **Orders** from the print menu.



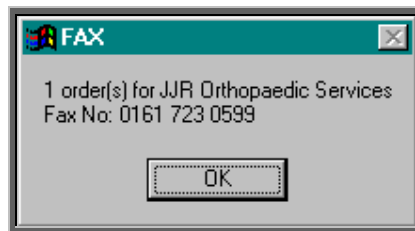
The above prompt will appear unless the supplier on the order is an internal stock supplier. If the supplier is **Stock** you will only be able to print the order and you will be asked how many copies are required.

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



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

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



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

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

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


15. Entering medical notes

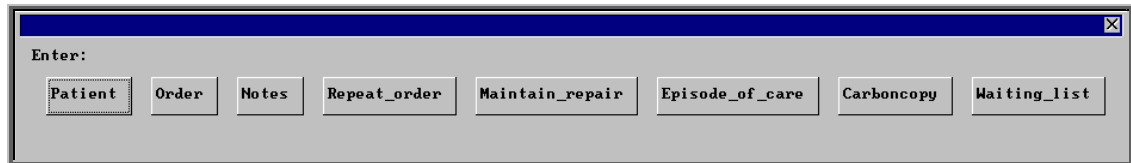
Medical notes can be added directly to the patient record, or, if a care-episode has been set up for the patient ([see Patients - Note 17. Adding a care episode](#)), notes can be attached to a specified episode of care.

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

Menu: Patients

1. Adding a medical note to the patient

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



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

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

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

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

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

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

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

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

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

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

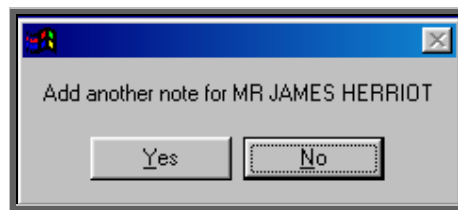
Note Adding a standard Note

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

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

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

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



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

Adding a Note using the 'Video' category

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

Adding a Note using the 'Picture' category

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

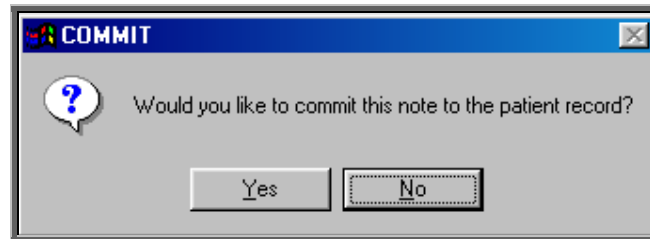
Adding a Note using the 'Temp' category

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

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

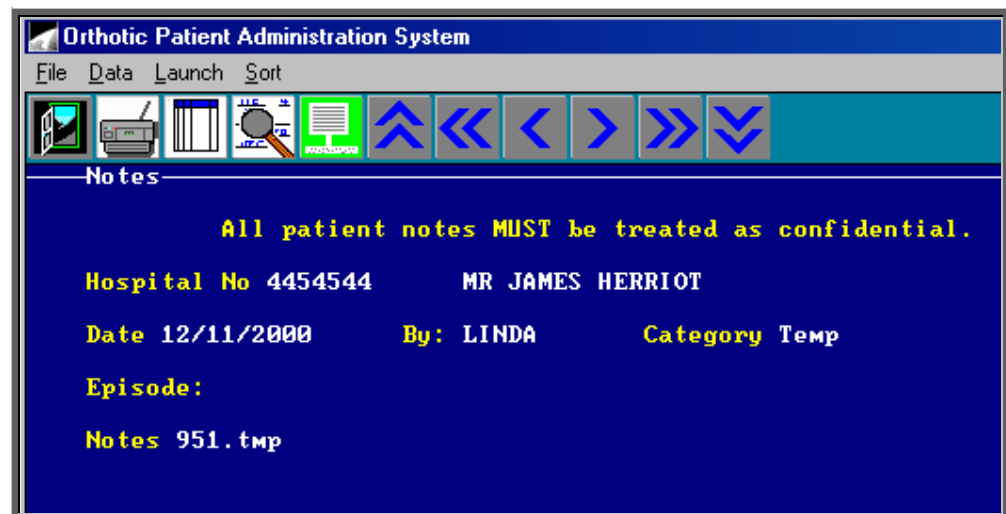
If you wish to print the temporary note press **Alt-P**

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



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


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




Editing a note entered with a 'Temp' category

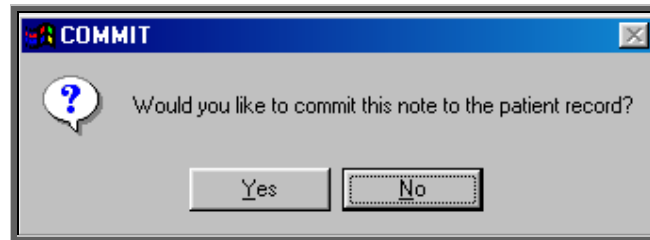
Find the note you wish to amend (by finding the patient record and

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

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



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




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


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

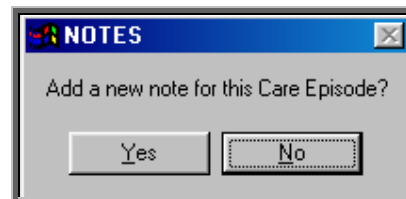
2. Adding a medical note to a care episode



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



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



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

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

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

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

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

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

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

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

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

Episode The care episode reference number will be brought through from the care episode record.

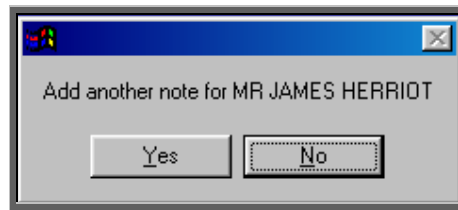
Note Adding a standard Note

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 its extension) and path of the video file you wish to attach as a note.

Adding a Note using the 'Picture' category

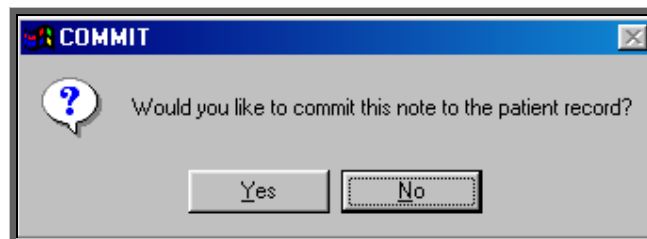
In the *Note* field type the file name (including its extension) and path of the picture file you wish to attach as a note.

Adding a Note using the 'Temp' category

In the *Note* field press **Ctrl-Enter** or **F10** to be taken to the Text Editor. The 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**.)

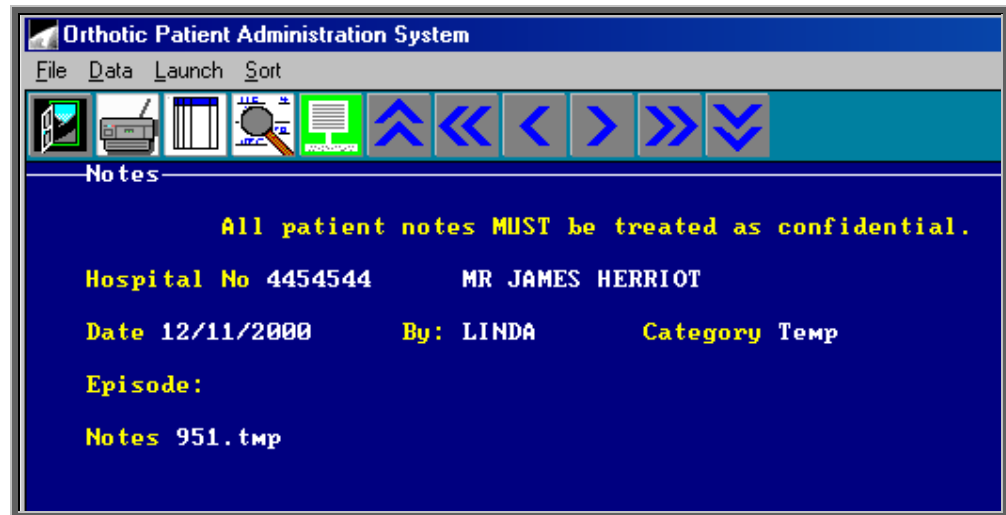
Type in the note, remembering that the first line of the note is shown in the table of medical notes on the patient's screen. Consider making the first line a summary of the content of the note.

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






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

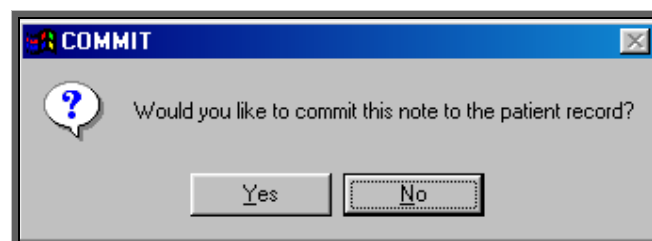
If you select **No**, the information typed in the Text Editor will be allocated a sequential temporary note number and this number will show in the *Note* field.



Editing a note entered with a 'Temp' category

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

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



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

If you select **No**, the changes will be saved against 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).

16. Printing medical notes

Menu: **Patients**

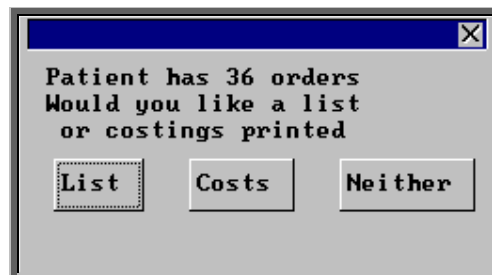
1. Patient demographics

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

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

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

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



List

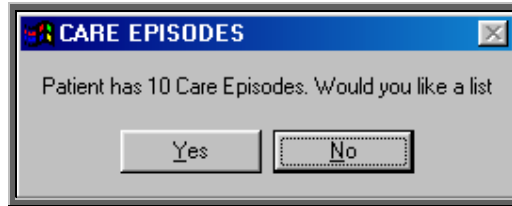
List prints a list of orders for that patient (Order number, Date of order and the general Description for that order).

Costs

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

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

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





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

2. Individual notes

a) General or care episode notes

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

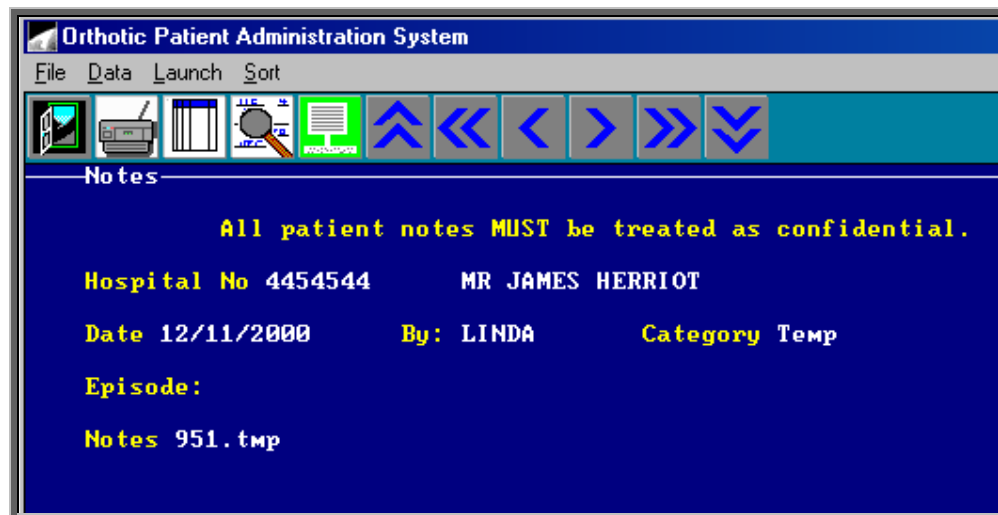
icon  (or Goto, Notes)).

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


b) temporary notes

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

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





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

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

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

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

17. Adding a care episode

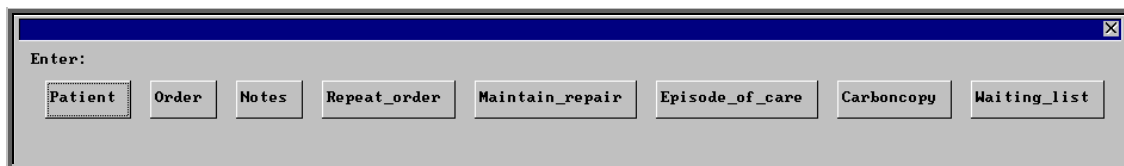
A care episode is a means of grouping together orders, notes and appointments that relate to a specific episode of care. Care episodes can also be used for tracking the pathway of the referral.

Menu: **Patients**

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



(or Edit, Enter).



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



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

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

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

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

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



18. Updating a care episode


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

Menu: **Patients** or

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

Find the patient whose care episode you wish to update.

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

Click on the 'update' icon  (or **E**dit, **U**date) and you will be taken to the Objectives field.

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



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

Note: Care Episodes cannot be deleted.

19. Printing care episode details

Menu: **Patients**

Find the patient whose care episode you wish to print.

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


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

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

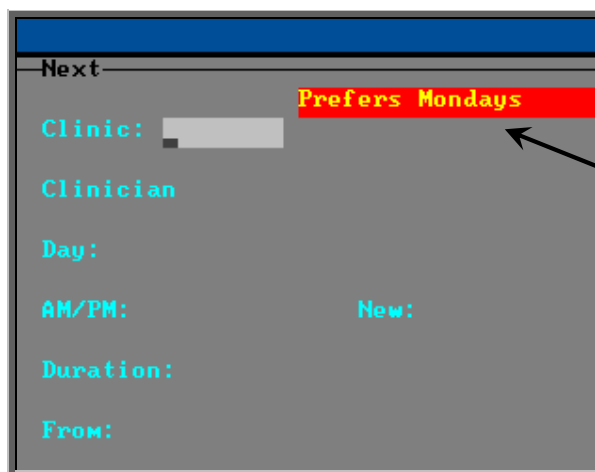
20. Making an appointment

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

Menu: **Patients**

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

Click on the 'next appointment' icon  (or Appointment, Next), to load the appointment selection screen below.



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

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

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

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

Day if you have a preference as to which day of the week the patient is seen then select a day from the pop-up list. If the patient can attend any day when there is a clinic at the venue selected then leave this

field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.

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

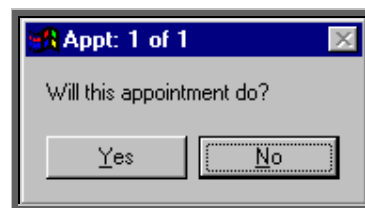
This function will only work effectively if your clinic sessions are set up as half-day sessions. All day sessions are classed as AM sessions so you may wish to change any full day sessions you have into two separate sessions (one for the morning and one for the afternoon) so that you can make full use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

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

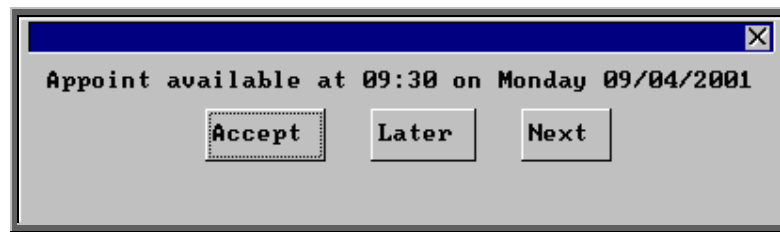
Duration will default to your standard appointment length (as set up in **Utilities – Choices – System**) but can be changed to the length of appointment required.

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

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



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



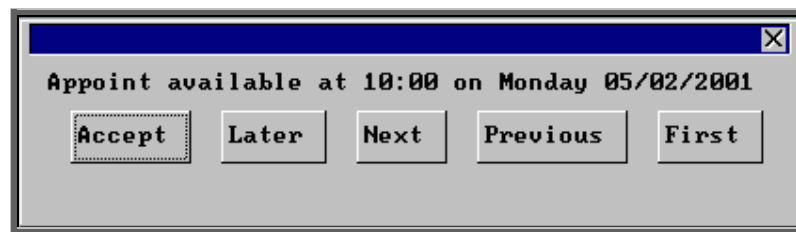
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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

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

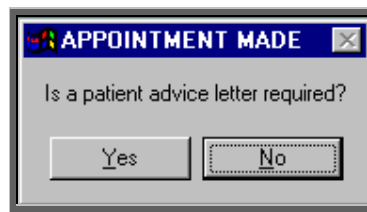
If you wish to abandon finding an appointment press **Esc**.

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



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

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



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

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



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

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

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




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


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

21. Amending an appointment

Finding the Appointment to be Amended

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

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

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

The following fields may be updated.

Duration

Advised

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

Referral

Referrer

New

Purchaser

Full and Partial

Letter

Type

Notes

Comments

Event

Care Episode

Order

Outcome

Booked

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


Reminder

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

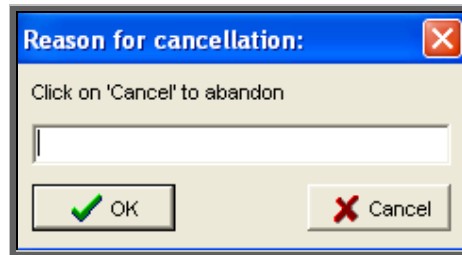
The patient cannot be amended. If you wish to offer the appointment time to another patient, the original appointment should be cancelled, and another one made for the new patient.

22. Cancellling an appointment

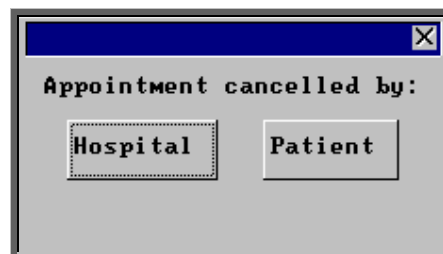
Menu: Patients

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

the 'cancel' icon  (or Cancel).



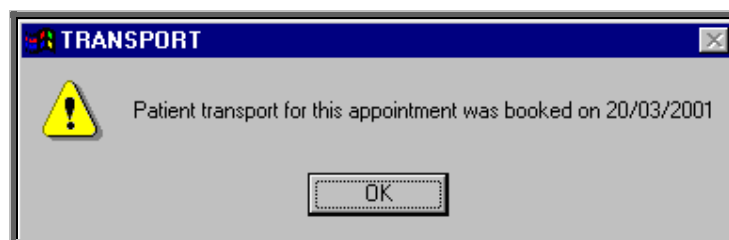
Enter the reason for the cancellation and click on OK. If you wish to abort the cancellation click on Cancel.



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

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

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



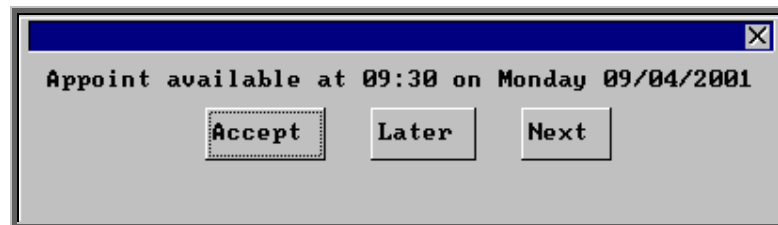
Warning. Cancelled appointments cannot be un-cancelled. If an appointment is cancelled be mistake you will need to make the appointment again.

Making a Replacement Appointment

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



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



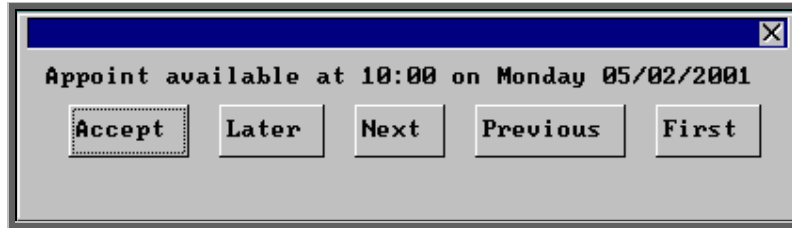
The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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

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

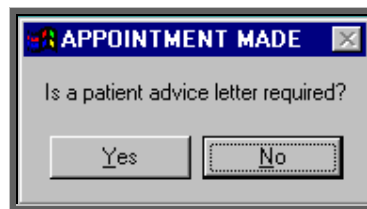
If you wish to abandon finding an appointment press **Esc**.

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



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

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



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

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

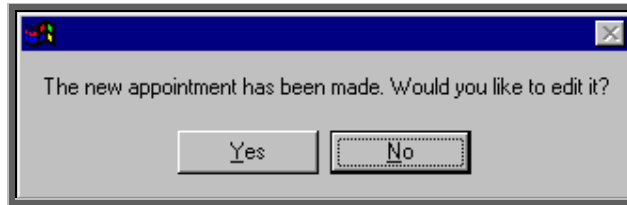


If you are using the Transport memo available in OPAS, they are also printed in batch (see [Appointments - Note 15. Printing appointment letters](#) and [Appointments - Note 16. Printing transport memos](#)).

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

- to allocate a different letter type other than the standard letter

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



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

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

Recording Cancelled Appointments

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



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

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

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

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

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

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

| Appointments | | | |
|--------------|-----|-------|----------------------|
| Date: | Day | Time: | At: |
| 28/03/2001 | Wed | 10:00 | Appliance Department |
| 03/04/2001 | Tue | 09:30 | Appliance Department |

However, whether the parameter is set to **Remove** or **Keep**, when an appointment is cancelled, that appointment time becomes available again so that another patient can be offered it. Also, regardless of the setting of the parameter, cancelled appointments will be transferred to the Archive so that statistical information can be produced for cancelled appointments.

23. Waiting List

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


a) Setting up the waiting list categories


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

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

| <i>Type</i> | <i>Weighting</i> |
|-------------|------------------|
| Urgent | 5 |
| Soon | 3 |
| Routine | 1 |

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


These, however, can be amended by clicking on the 'update' icon  (or **E**dit, **U**ppdate), or additional **Wait Types** can be added by clicking on the 'enter' icon

 (or **E**dit, **E**nter) and entering the type and its appropriate weighting. The order that you enter the types here will be the order they initially appear in the drop down selection when adding a patient to the waiting list, so you may wish to enter them in priority order.

b) Adding patients to the waiting list

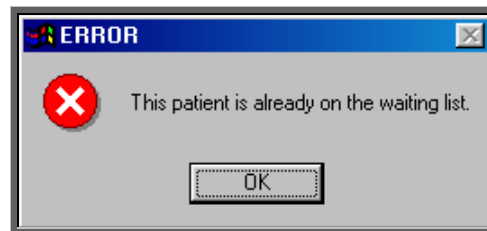
Menu: **Patients**

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

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

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

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



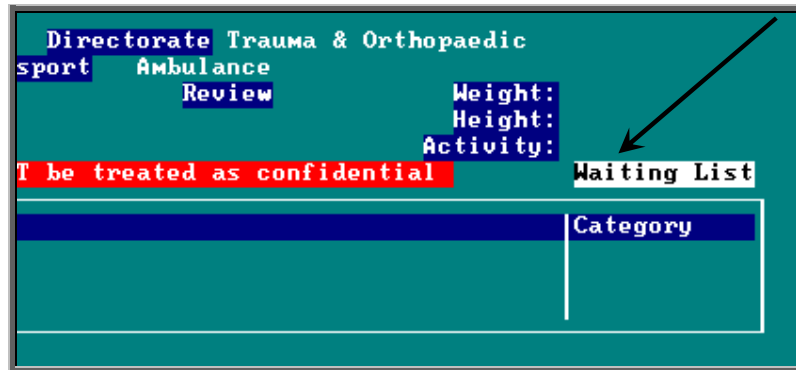
Otherwise you will be taken to the waiting list screen.

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

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

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

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



c) Accessing the waiting list information

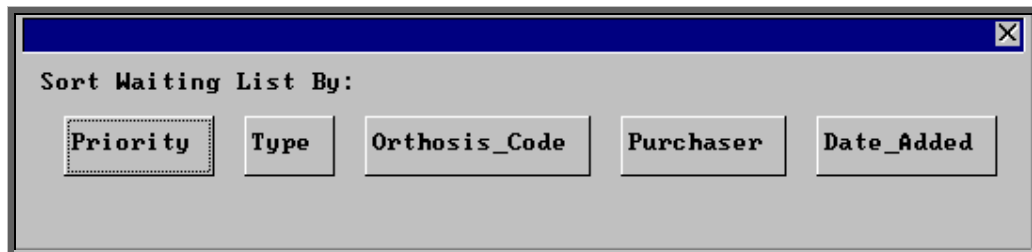
i) Menu: Patients

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

ii) Menu: Appointments – Current – Waiting List

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

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



Priority

Each patient has a *Priority* value that is calculated by multiplying the number of days the patient has been on the waiting list by the weighting applied to the type (in **Utilities – Choices – Wait Types**).




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










Type The patients will be shown with the **Urgent** entries first, then the **Soon's** and then the **Routine's**. Within the types they will be in *Priority* value. Therefore, the first person you will see on entering the screen will be the most urgent **Urgent!**

Orthosis Code The patients will be shown in Orthosis Code order. This will enable you to see if there is a specific type of appliance that patients are waiting for.

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

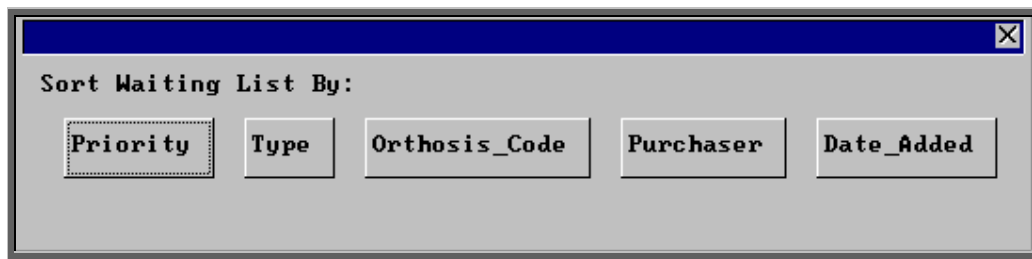
Date Added The patients will be shown in order of the date they were added to the Waiting List. The patient that has been on the Waiting List longest will be shown first.

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

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

d) Printing the waiting list

Menu: Appointments – Current – Waiting List



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



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

Click on This_view at the top of the screen.

Highlight **WAITLIST**.

Click on Run at the top of the screen.


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

e) Maintaining the current waiting list

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

i) Editing the Waiting List


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

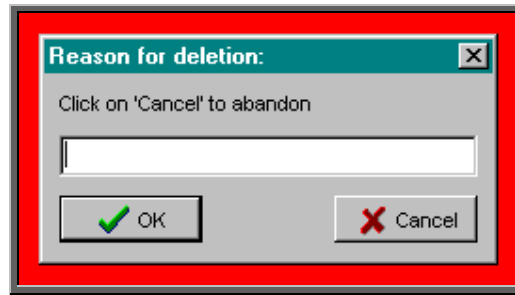
patient, click on the 'update' icon  (or Edit, Udate). To change the *Type* or *Orthosis Code* press the **Tab** key to see the list of available options. Press **Ctrl-Enter** to save the changes made.

ii) Deleting patients from the Waiting List

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

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

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




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


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



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

f) Making appointments

- from within the **Waiting List** screen click on the 'clock' icon  (or **A**ppoint)

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

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

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



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

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


24. Carbon Copy


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

The following steps should be followed:

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

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

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

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

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

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

b) Adding contacts to the patient record

Menu: **Patients**

Find the relevant patient.

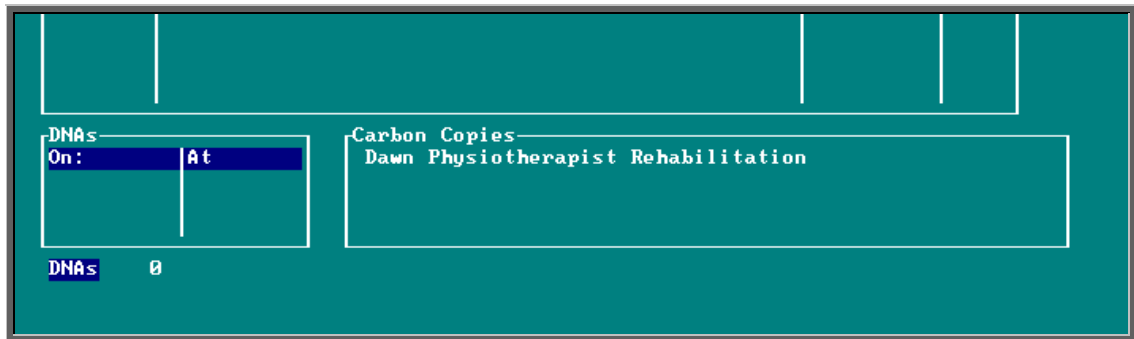
Click on the 'enter' icon  (or Edit, Enter)

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

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

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

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



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

| Tables | | | | | |
|---------------|--------|--------------|---------------|------|-----------------|
| Medical_Notes | Orders | Appointments | Prescriptions | DNAs | ⇒ Carbon_Copies |
| Addresses | | | | | |

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



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

c) Deleting contacts from a patient record

Menu: **Patients**

Find the relevant patient.

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

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

d) Adding the Carbon Copy field to your appointment letters

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

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

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



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



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

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

CC `{{+cc}}` (will give you the contact name)


CC `{{+cc}}- {{pos}}` (will give you the contact name and position)


CC `{{+cc}}- {{pos}} - {{loc}}` (will give you the contact name, position and location)

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

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

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

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

(or File, Exit), and then click on the 'exit with a question mark' icon  (or Return). You will be asked if you wish to save the current document. If you are happy with the changes that you have made then choose Yes. If you want to leave the letter as it was when you first opened it then choose No.

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

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

25. This

Menu: Patients

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

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

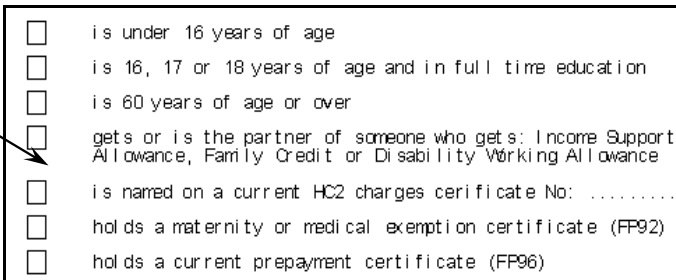


(or Sort) and select Physical.

26. Printing HSA5/WF1 Forms

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

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



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

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

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

Printing the forms

Menu: **Patients**

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

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

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

Select **Mail Merge** from the print menu

Click on This View at the top of the screen

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

Click on Run



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


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



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

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

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

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

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

a) Editing the HSA5 form

Menu: Utilities – Choices – Letters

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

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



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




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

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

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



(or File, Exit), and then click on the ‘exit with a question mark’ icon  (or Return). You will be asked if you wish to save the current document. If you are happy with the changes that you have made then choose Yes. If you want to leave the letter as it was when you first opened it, choose No.

b) Editing the WF1 form

Menu: **Utilities – Choices – Letters**

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

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



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




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

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


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



(or File, Exit), and then click on the ‘exit with a question mark’ icon  (or Return). You will be asked if you wish to save the current document. If you are happy with the changes that you have made then choose Yes. If you want to leave the letter as it was when you first opened it, choose No.


27. Paslink

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


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

28. GP

Menu: **Patients**

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

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

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

Select **Mail Merge** from the print menu

Click on This View at the top of the screen

Highlight the GPLET you wish to use

Click on Run



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

Click on Ok to continue.

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

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

29. Mobility

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

30. Dormant patients


Menu: Patients

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

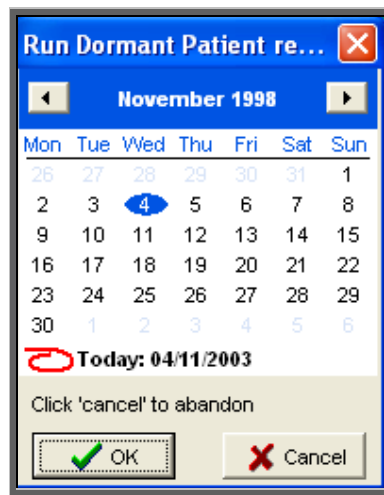
e.g. If your dormant period is set to 3 years and you run dormant patients on the 1 September 2000 it will find all the patients whose last order was before 1 Sep 1997 **and** those patients that were entered (and therefore have a registered date) before 1 Sep 1997 that have had no orders at all.

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

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

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

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



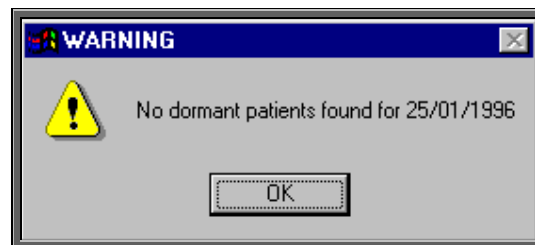
To abandon the Dormant option click on Cancel

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

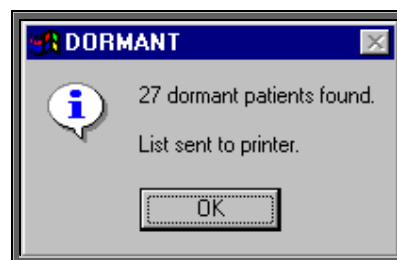
Click on OK.

One of three possible outcomes will then occur.

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

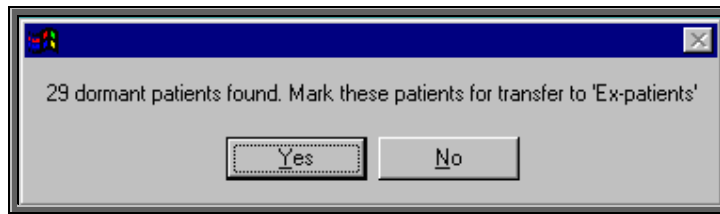


2. If you overtype the start date and patients are found that have not had orders between then and today, a list of these patients will be printed.

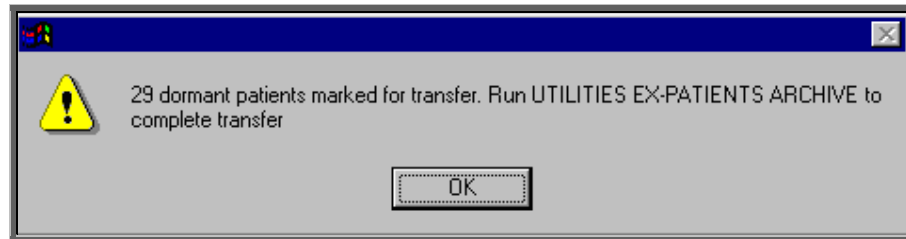




3. If you leave the start date as the true dormant period and patients that have not had orders in that period are found, a list will be printed, and you will be asked if you

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



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



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

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

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

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