

Reports

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1. Introduction

In **Reports** we can retrieve the data that has been entered into OPAS. Like any database, the information that we can get out is only as good as the information that is put in. For example, if you want to know how many of your appointments Did Not Attend, then OPAS can only tell you this if you have updated the sessions after the clinic to record who did and did not attend. Similarly, you can only find out the value of goods received over a particular period of time if the goods have been booked in on the order.

There are a lot of reports available, covering appointments, orders, patients and prescriptions. The majority of the reports are analysing information entered on the orders, because not only do we want to know how much has been spent, but we want to know who we spent it with (Supplier), on what type of appliance (Orthosis code) and which part of the hospital (Directorate) created the expense.

The **Reports** module is split between **Appointments** reports, **Financial** reports, **Patients** reports and **Prescriptions** reports. Within appointment and financial reports we can select **Ad-hoc** or **Batches**. Ad-hoc gives you the flexibility to specify particular information that you are interested in, whereas Batches contains pre-set report templates. When first using reports, you will find running the batch reports easier. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance.

Most reports, as well as being able to send to the printer, can be seen on screen or saved as a file. Reports saved as files can then be e-mailed to other departments or exported into spreadsheets.

Users of OPAS have requested all the reports in OPAS. If there is a report currently not in OPAS that you require, please let us know. All new reports are included in future versions of OPAS so that everyone benefits.

Finally, and I cannot stress this enough, the format of the printed report can be tailored to suit your requirements. Just like your order and letters layouts were customised when you first started using OPAS, so can your reports. So, if you print a report and it shows the patient's hospital number and you would rather see the patient's name, or if the value of the order is showing net cost and you need gross or if the report is in date order and you want it to be in supplier order, then please let us know and we can change the report for you.

2. Appointment Reports (Ad Hoc)

Menu: Reports – Appointments – Ad hoc or

Menu: Appointments – Print – Reports – Ad hoc

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

OPAS Appointment Reports Selection Criteria Screen

Appointments Archived Current

Venue All One

Outcome All One

Dates All Range

Continue? No Yes

Appointments

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

Select Current if the appointments you wish to analyse are current

Venue

Select All if all Venues are to be included

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

Outcome

Select All if all Outcomes are to be included

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

Dates

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

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



Now type in the from date in the next space.



Continue

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

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



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

Activity

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

Letters

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

List

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

Sessions

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

3. Appointments Reports (Batches)

Menu: Reports – Appointments – Batches or

Menu: Appointments – Print – Reports – Batches

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

4. Appointments report – Bookings

Menu: Reports – Appointments – Batches – Bookings or

Menu: Appointments – Print – Reports – Batches – Bookings

This report interrogates the information entered in the booking fields.

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

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

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

Below is an example of the Booking Report.

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

5. Appointments report – Clinician

Menu: Reports – Appointments – Batches – Clinician or

Menu: Appointments – Print – Reports – Batches – Clinician

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

The screenshot shows a window titled "Clinician Activity". It contains four input fields: "Purchaser" (with a dropdown arrow), "Clinician" (with a dropdown arrow), "Start Date", and "End Date".

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

The screenshot shows a dialog box titled "Print 5 records". It contains three buttons: "Screen", "Printer", and "File".

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

Below is an example of the Clinician Report.

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

Count 9

6. Appointments report – Directorate

Menu: Reports – Appointments – Batches – Directorate or

Menu: Appointments – Print – Reports – Batches – Directorate

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

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

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



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

Below is an example of the Directorate Report.

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

7. Appointments report – GP Activity

Menu: Reports – Appointments – Batches – GP Activity or

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

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

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

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

Below is an example of the GP Activity Report.

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

8. Appointments report – New Patients

Menu: Reports – Appointments – Batches – New Patients or

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

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

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

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

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

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

New Patient Appointments by Consultant 01/01/2003 - 31/03/2003							
Consultant	Total	Attended OP	Attended IP	Attended Other	DNA OP	DNA IP	DNA Other
M Surgeon	3	1		1	1		
A N Other	1						
M N Parrish	2	2					
m smith	1				1		

9. Appointments report – Patient Charter Stats

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

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

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

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

Patient Charter Statistics

Sort by:

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



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

Below is an example of the Patient Charter Stats Report.

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

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

Number of patients seen within 30 minutes of their appointment time

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

Number of patients seen after 1 hour of their appointment time

Those appointments that do not have 'seen' times logged

10. Appointments reports – Referrer

Menu: Reports – Appointments – Batches – Referrer or

Menu: Appointments – Print – Reports – Batches – Referrer

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



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



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

Below is an example of the Referrer Report.

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

11. Appointments report – Reveiws

Menu: Reports – Appointments – Batches – Reviews or

Menu: Appointments – Print – Reports – Batches – Reviews

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

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

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

- enter the End date of the required date range in the format DD MM YYYY
- enter how the report is to be sorted By. Available options appearing in the pop-up box are Clinician, Directorate, Referrer or Venue



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

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

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

12. Appointments report – Transport

Menu: Reports – Appointments – Batches – Transport or

Menu: Appointments – Print – Reports – Batches – Transport

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

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

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

Below is an example of the **Transport Report**

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

13. Appointments report – Uncollected

Menu: Reports – Appointments – Batches – Uncollected or

Menu: Appointments – Print – Reports – Batches – Uncollected

This report has two functions. Firstly it will report on those orders where the goods have not been collected, and then secondly, give you the option to send a reminder collection letter to those patients. OPAS determines which orders have not been

collected by looking for orders where the ACO field is C and where the goods have been delivered but not yet supplied.



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



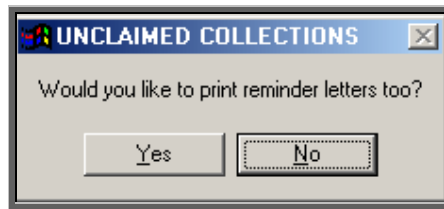
Once the data has been found you have the option to see the report on screen, to be printed or sent to a file for exporting into Lotus 123 or MS Excel

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

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

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

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



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

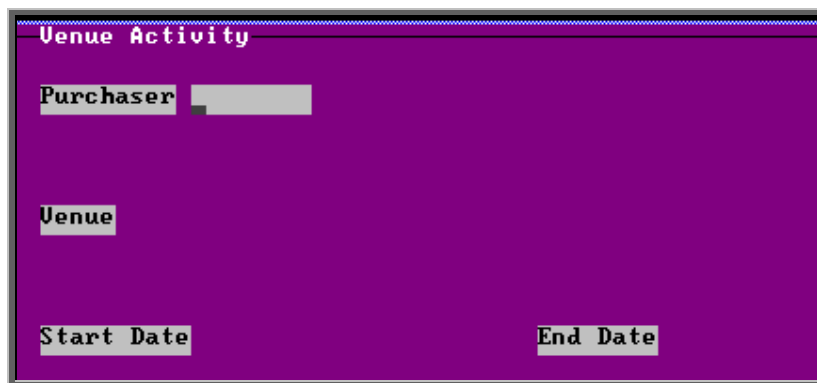
Note: If you wish to edit the wording of the reminder collection letter the template is held within **Utilities – Choices – Letters** and is called **Uncoll**.

14. Appointments report - Venues

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

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

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

A screenshot of a terminal-style window titled "Venue Activity". The window has a purple background. It contains several text input fields: "Purchaser" (with a small dropdown arrow), "Venue", "Start Date", and "End Date". The text is in a monospaced font.

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

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



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

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

Venue	Total	Time	0	1	2	3	4	5	6	Collect
A N Other Clinic	1	15		1						
Appliance Department	131	2005		127	3	1				3
LINDAS SPECIAL CLINIC	6	90		6						
New Clinic	23	540		22	1					3
Test	6	90		6						
TEST AREA	2	30		2						
testing	7	105		6	1					
Yet Another Test	1	15		1						
Grand Total	177	2890	0	171	5	1	0	0	0	6
Count 8										

15. Financial Reports (Ad Hoc)

Menu: Reports – Financial – Ad hoc or

Menu: History - Reports

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

OPAS Reports Selection Criteria Screen

Purchaser No Yes One Range

Directorate No Yes One Range

Referrer No Yes One Range

Orthosis Code No Yes One Range

Supplier No Yes One Range

GP No Yes One Range

Post Code No Yes One Range

Dates All One Range

Using Ordered Received Supplied Invoiced Purchase_Invoice Paydate

Continue? No Yes

Purchaser

- Select No if all Purchasers are to be included in the report but you **do not** require a sub-total for each Purchaser
- Select Yes if all Purchasers are to be included in the report and you **do** want a sub-total for each Purchaser. Use the space bar on your keyboard to move the highlight from **No** to **Yes**
- Select One if only one Purchaser is to be included on the report. Use the space bar on your keyboard to move the highlight from **NO** to **One** and press **Enter**. A pop up list will appear for you to make your selection from. Your selection will appear on the screen.

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

Directorate No Yes One Range

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

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

Directorate No Yes One Range

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

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

Dates

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

Select One if you want to report on one specific date. Use the space bar on your keyboard to move the highlight from All to One and press **Enter**. Type the date in the space provided in the format DD MM YYYY.

A screenshot of a software interface showing a menu titled 'Dates'. The menu has four options: 'Dates', 'All', 'One', and 'Range'. The 'One' option is highlighted with a blue background. To the right of the menu is a text input field containing two slashes '/' and a space, indicating a date format.

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

A screenshot of the same 'Dates' menu. The 'Range' option is now highlighted with a blue background. The text input field to the right still contains two slashes '/' and a space.

Now type in the from date in the next space.

A screenshot of the 'Dates' menu with 'Range' highlighted. The text input field now contains the date '01/04/2001' followed by 'to' and two slashes '/' and a space, indicating a date range.

Using

Select Ordered if you want to report on those orders that have an order date within the dates selected above

Select Received if you want to report on those orders that were received within the dates selected above

Select Supplied if you want to report on those orders that were supplied within the dates selected above

Select Invoiced if you want to report on those orders where the date of the suppliers invoice is within the dates selected above

Select Purchase if you want to report on those orders where the date of the

Invoice	purchase invoice is within the dates selected above
Select Paydate	if you want to report on those orders that were passed for payment is within the dates selected above

Continue

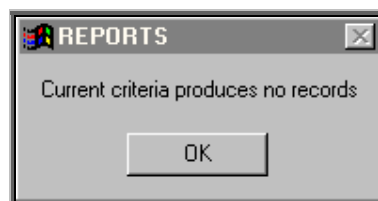
Select No	if you wish to abandon the Ad hoc report screen
Select Yes	if you wish OPAS to search for the orders that match the criteria selected

The selection screen below would show me all orders that had been supplied in April 2001 that were raised for Trauma & Orthopaedic for custom footwear, giving sub-totals for each supplier.

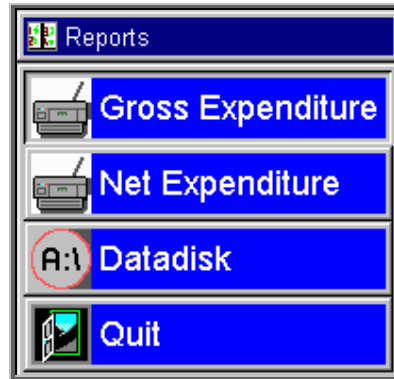
OPAS Reports Selection Criteria Screen

Purchaser	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> One	<input checked="" type="checkbox"/> Range			
Directorate	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> One	<input checked="" type="checkbox"/> Range	Trauma & Orthopaedic		
Referrer	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> One	<input type="checkbox"/> Range			
Orthosis Code	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> One	<input checked="" type="checkbox"/> Range	ABC123	Custom Footwear	
Supplier	<input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> One	<input type="checkbox"/> Range			
GP	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> One	<input type="checkbox"/> Range			
Post Code	<input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="checkbox"/> One	<input type="checkbox"/> Range			
Dates	<input type="checkbox"/> All	<input type="checkbox"/> One	<input checked="" type="checkbox"/> Range		01/04/2001 to 30/04/2001		
Using	<input type="checkbox"/> Ordered	<input type="checkbox"/> Received	<input checked="" type="checkbox"/> Supplied	<input type="checkbox"/> Invoiced	<input type="checkbox"/> Purchase_Invoice	<input type="checkbox"/> Paydate	
Continue? <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes							

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

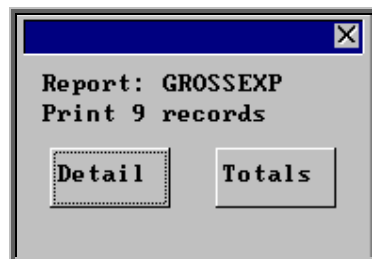


If orders have been found that match your criteria then the following **Reports** menu will appear.

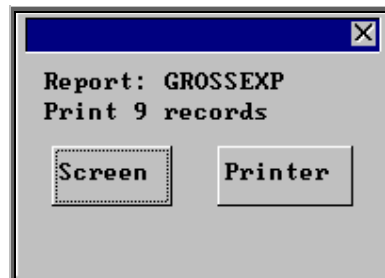


Gross Expenditure

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



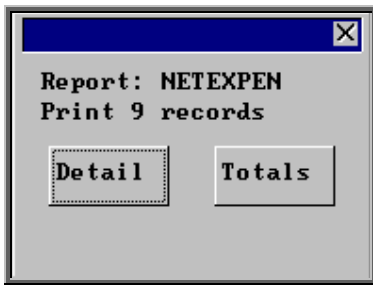
You will be shown how many orders OPAS has found and ask if you want to see the information in **detail** i.e. a line for each order or just **totals**



You will then be asked if you wish to see the information on the **screen** or to be sent to the **printer**. If screen is selected, having looked at it on the screen, you still have the option to send the information to the printer afterwards. If you don't want either option, press **Esc** to abandon.

Net Expenditure

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



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



You will then be asked if you wish to see the information on the **screen** or to be sent to the **printer**. If **screen** is selected, having looked at it on the screen, you still have the option to send the information to the printer afterwards. If you don't want either option, press **Esc** to abandon.

Datadisk

The **Datadisk** option transfers the information found onto a 3 ½ floppy disk so that the data can be exported into a spreadsheet for manipulation, or into a report.

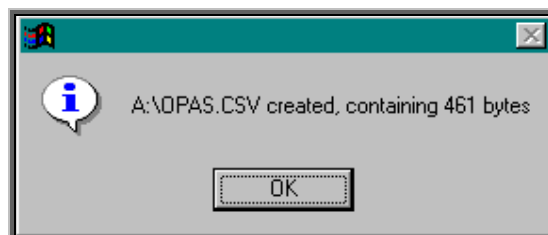
Having selected **Datadisk**, you can then choose what information on the order will be transferred. Move down the list, selecting those fields required by pressing **F7**. If a field is selected by mistake press **F7** again to de-select. The list is more than a page, so scroll down the page to see more. Once you have all the fields required press **F10** to continue. In the example below, I have selected the Order Number, Order Date, Patients full name and the Supplier name.

Fieldname	Type	Length	Filename	On table
Order No	Alpha	10	applianc	No
Order Ref	Counter	8	applianc	No
Post Code	Alpha	15	patients	No
Fit	Alpha	1	purchase	No
Pass	Alpha	1	applianc	No
Paydate	Date	8	applianc	No
Hsp Ord No	Alpha	20	applianc	No
Date of Order	Date	8	applianc	No
Sup Inv No	Alpha	10	applianc	No
Invoice Date	Date	8	applianc	No
Received	Date	8	applianc	No
Supplied	Date	8	applianc	No
Processor:	Alpha	8	applianc	No
Sales UAT	Alpha	1	purchase	No
Discount	Numeric	8	purchase	No
Hospital No	Alpha	12	applianc	No
Title	Alpha	12	patients	No
Forenames	Alpha	20	patients	No
Surname	Alpha	20	patients	No
Search	Alpha	18	oprice	No
MANUFACT	Numeric	8	oprice	No
code:	Alpha	15	item	No
DESCRIPT	Alpha	60	item	No
Purch Inv Date:	Date	8	applianc	No
pin:	Alpha	15	applianc	No
Clinician	Numeric	8	applianc	No
O:	Inverted	25	orthists	No
Supplier Code	Alpha	3	applianc	No
Cons_ref	Numeric	8	applianc	No
Purchaser	Numeric	8	applianc	No
Purchaser:	Alpha	30	purchase	No
NAME	Alpha	50	Supplier	No

A 3 ½ floppy disk now needs to be put into your computer, and then click on OK.



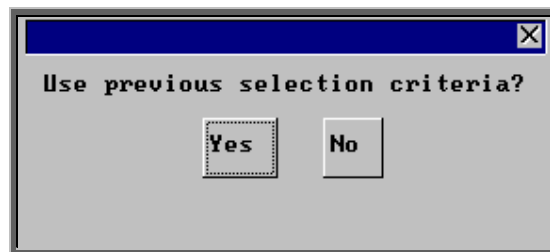
A comma separated variable file will be created called **OPAS.csv**.



This can now be exported into Lotus123 or MS Excel.

A	A	B	C	D	E	F
1	G00363	25/06/2002	MR	FRED	BLOGGS	Gilbert & Mellish Ltd
2	G00366	25/06/2002		S	ADLER	Jane Saunders & Manning Ltd
3	G00368	27/06/2002		DA	HANLEY	Jane Saunders & Manning Ltd
4	G00370	12/07/2002	MR	MARTIN	CRAVEN	Jane Saunders & Manning Ltd
5	G00369	12/07/2002		HJ	CARNE	Jane Saunders & Manning Ltd
6	G00371	25/07/2002	MR	FRED	BLOGGS	Ortho C Fab
7	G00375	11/09/2002	MR	KELVIN	BLOGGS	Jane Saunders & Manning Ltd

Note: The next time you select the **Ad hoc** report the following prompt will appear.



This is to save having to re-enter all the search criteria if you want to run exactly the same report again, or perhaps the same report with a different date range.

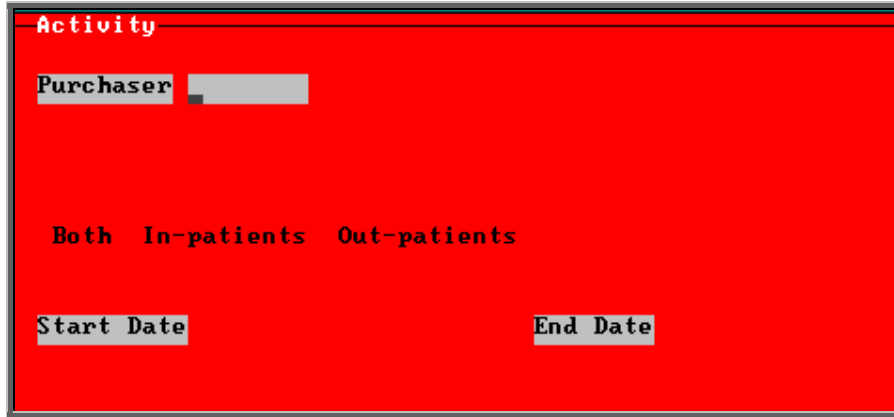
16. Financial Reports (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 27 different batch reports for orders alone, so we do not expect you to remember what they all do. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

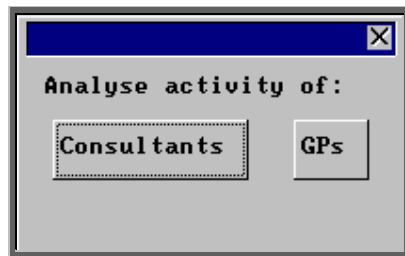
17. Financial report - Activity

Menu: Reports – Financial – Batches - Activity

The **Activity** report will show the number and value of orders for a specific period. The information can be analysed by Referrer or GP.



- select the Purchaser required from the pop up list
- select In-patients, Out-patients or Both. Press the space bar to move the highlight onto the required option
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Select whether the data is to be analysed by **Consultants** or **GPs**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

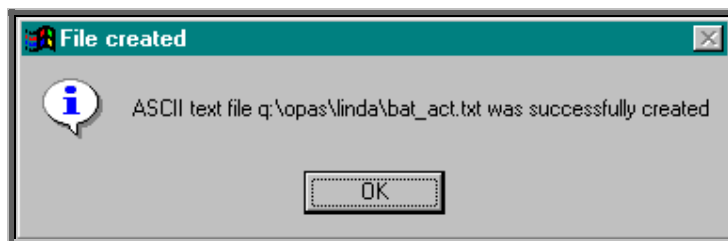
Printer

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

NHS TRUST				
Consultant Activity : All patients 28/10/2003				
01/01/2000 - 21/12/2003				
Directorate	Consultant	episodes	Cost	
Paediatrics	A N Other	1	352.50	352.50
Trauma & Orthopaedic	A N Other	1	338.94	338.94
	Mr Surgeon	11	1476.25	134.20
	Directorate Total	12	1815.19	

File

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



18. Financial report – Clinician

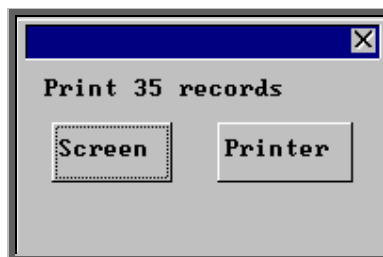
Menu: Reports – Financial – Batches – Clinician

The **Clinician** report gives detail of expenditure by Clinician. The report can be analysed by Costcode (Orthosis Code) or Directorate.

The screenshot shows a window titled "Clinicians" with a red background. It contains the following fields:

- Clinician**: A dropdown menu with a small square icon to its right.
- By:** Two options, "Costcode" and "Directorate", are listed with a space bar between them.
- Start Date**: A text input field.
- End Date**: A text input field.

- select the Clinician required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Othotist field empty will result in all Clinicians being selected
- select Costcode or Directorate depending on how you want to analyse the data. Press the space bar to move between the options
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



Once the data has been found you have the option to see the report on screen or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen or Printer. Make another selection or press **Esc** again to return to the menu.

Printer

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

Below is an example of the Clinician report by Costcode.

New User NHS Trust				
Orthotist spend by Cost Code				
01/ 01/ 2000-31/ 12/ 2003				
Orthotist	Orthosis Code	Order No	Net :	Gross :
2	111111	G00403/ R1	288.46	338.94
		G00403	269.18	316.29
		G00397	55.20	64.86
		ER/ERE	0.00	0.00
		G00387	22.00	25.85
		5	634.84	745.94
999999		G00373	295.21	346.87

19. Financial report - Clinics

Menu: Reports – Financial – Batches – Clinics

The **Clinics** report will breakdown the expenditure on orders by the patients Referrer. The report can be run for all Referrers or one specific Referrer.

The screenshot shows a red background with the title "Clinics" in red. Below the title, there are three input fields: "Consultant" with a grey box, "Start Date" with a grey box, and "End Date" with a grey box.

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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

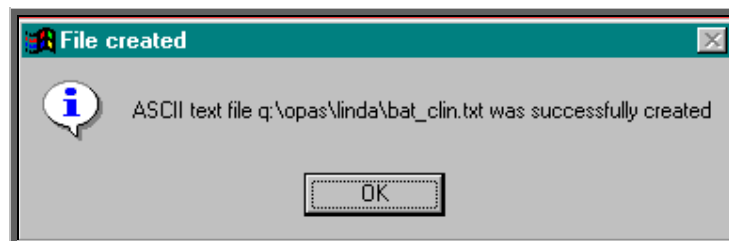
Printer

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

New User NHS Trust				
Monthly Report To Purchaser : Mr Surgeon Trauma & Orthopaedic				
01/ 01/ 2000 to 31/ 12/ 2003				
Clinic:	Code	Hosp No	Patient Name	Gross
Appliance Department	999999	G3350674	A YOUNG	14.38
	XYZ890	G9202344	D FREAKER	239.37
	999999	G3355370	D EYRE	64.51
	ABC123	ABC21234	M S S T EYES	328.29
	999999	01232195	J HAM LTON	2.17
	ABC123	G0326425	H CARNE	363.94
	ABC123	TEMP000010	MR M CRAVEN	363.94
	999999	TORUS004	M S S T SM TH	346.87
	ABC123	G0230753	R BENNET	64.08
	111111	12345QWERTY	MR K BLOOGS	25.85
	ABC123	TEMP000013	A HARTIGAN	9.72
	ABC123	12345QWERTY	MR K BLOOGS	0.00
Total				1,823.12
Count				12
Total for Consultant				1,823.12
Count				12

File

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



20. Financial report - Costcode

Menu: Reports – Financial – Batches – Costcode

The **Costcode** report will breakdown the expenditure on orders by the Orthosis Code. This report also gives you the ability to interrogate expenditure on Orthosis Codes by Referrer, Directorate, Purchaser or Supplier, showing the count (number of orders), Net (value excluding VAT), Gross (value including VAT) or Sell (value sold on to 3rd party).

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY
- select No to print the standard **Costcode** report that shows orders raised by Orthosis Code.

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

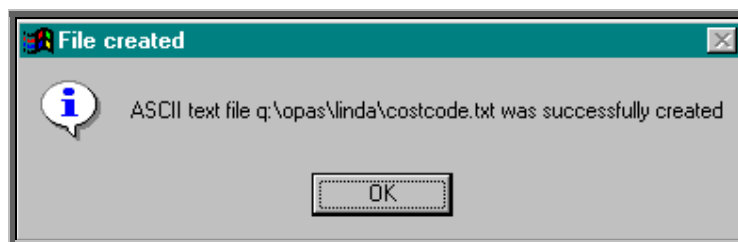
Printer

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

New User NHS Trust				
Amount Spent by Cost Code (NHS TRUST)				
01/ 01/ 2000 to 31/ 12/ 2003				
Cost Code		Net	Gross	Sel l
111111		22.00	25.85	0.00
		288.46	338.94	330.47
Total for code	Sum	310.46	364.79	330.47
111111	Avg	155.23	182.40	165.24
	Count	2		
999999		1.85	2.17	0.00
		54.90	64.51	0.00
		12.24	14.38	14.02
Total for code	Sum	68.99	81.06	14.02
999999	Avg	23.00	27.02	4.67
	Count	3		

File

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



If Count, Net, Gross or Sell are selected a spreadsheet will be produced.

Select Count if you want to know how many orders were raised. If you select Count you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

Select **Net** if you want to know the value of the orders excluding VAT. If you select **Net** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

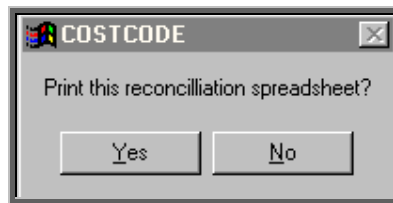
Select **Gross** if you want to know the value of the orders including VAT. If you select **Gross** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

Select **Sell** if you want to know the value the goods were sold on for. If you select **Sell** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

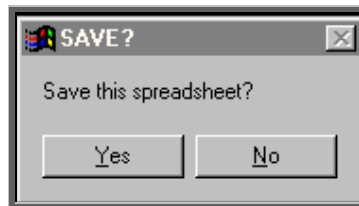
Below is an example of a spreadsheet produced by selecting **Net** and **Directorate**.

	1	2	3	4
1	Cost-code reconciliation			
2	All Purchasers by Directorate			
3	01/01/2001 - 01/01/2002			
4	Net Cost			
5		999999	ABC123	Totals
6	PCG		£577.68	£577.68
7	Surgery			
8	Trauma & Orthopaedic	£404.34	£519.48	£923.82
9				
10	Totals	£404.34	£1,097.16	£1,501.50
11				
12				

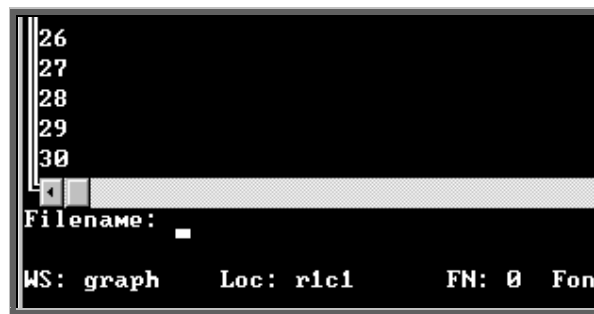
You will be asked if you wish to print the spreadsheet.



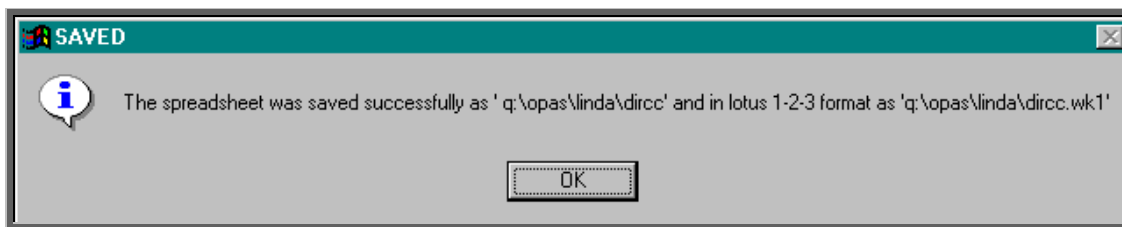
You will then be asked if you wish to save the spreadsheet.



If you select **Yes**, you need to enter a filename at the bottom of the screen.



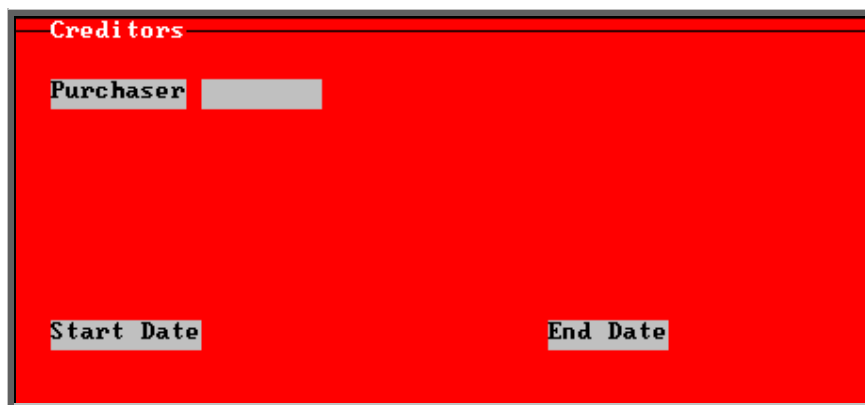
This will then be saved with that name within your personal directory of OPAS.



21. Financial report - Creditors

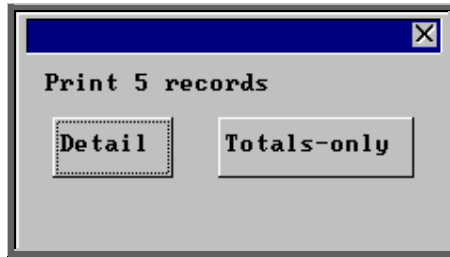
Menu: Reports – Financial – Batches – Creditors

The **Creditors** report is particularly useful for your Finance department, as it shows those orders where an invoice has not yet been received. This will give them an indication of how much has been committed and is still to pay for. The report initially shows all orders where there has not yet been an invoice, but we can change this report to show only those orders where there has not yet been an invoice but the goods have been received.



- select the Purchaser required from the pop up list.

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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

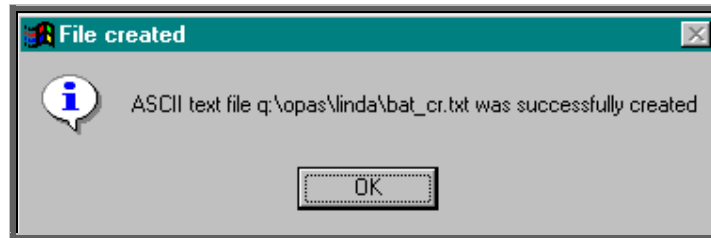
Printer

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

G00376	16/09/2002	28/01/2003	29/01/2003	ELIZABETH	BUTCHER	7.97
G00376/R1	28/04/2003			KELVIN	BLOGGS	0.00
G00376/R2	02/07/2003			KELVIN	BLOGGS	0.00
G00376/R3	04/09/2003			KELVIN	BLOGGS	0.00
Total for Bolton Bros.(Surg. Shoemakers) Ltd						7.97
Count 4						
1234567890	14/10/2003			KELVIN	BLOGGS	300.80
9876543210	14/10/2003			KELVIN	BLOGGS	300.80
G00357	31/10/2001	06/06/2002		FRED	BLOGGS	103.26
G00396	28/04/2003			TEE	EYES	322.04
Total for Halo Healthcare Ltd						1,026.90

File

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



22. Financial report - Debtors

Menu: Reports – Financial – Batches – Debtors

The **Debtor** report lists those orders that have had a supplier invoice but have not yet been re-invoiced to the Purchaser (where the Purchaser is set as external for re-charging purposes).

- select the **Purchaser** required from the pop up list. If you select a Purchaser that is not an external purchaser the following message will appear. Press the **Tab** key to bring the pop up list back and make another selection.



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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

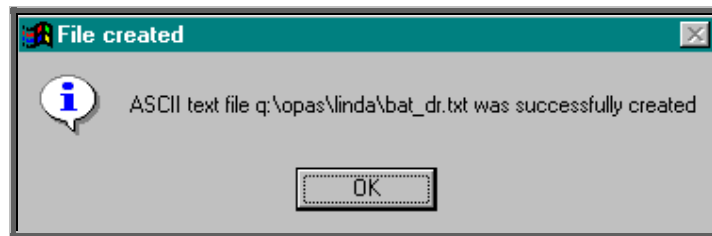
Printer

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

Debtors Report for GP Fundholder Supplier invoiced between 01/01/2000 and 31/12/2003 not yet re-invoiced			
Order No	Date of Order	Name	Cost :
2343234er	14/10/2003	MR KELVIN BLOGGS	55.44
G00393	28/04/2003	ALF HARTIGAN	288.27
G00403/R1	04/09/2003	MISS TESSA SMITH	288.46
Grand Total			632.17

File

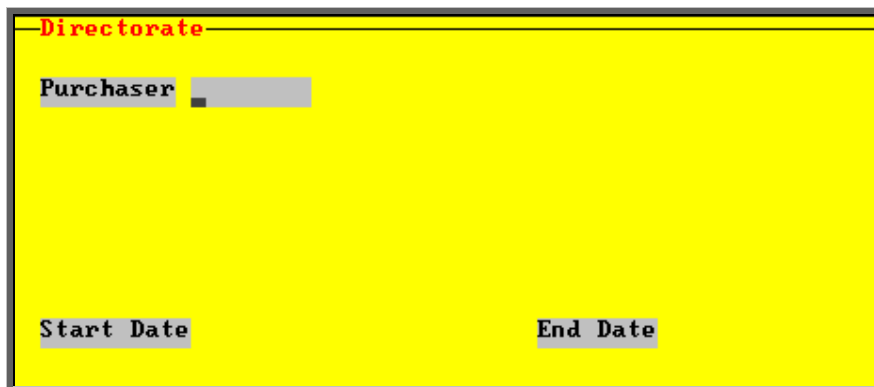
A comma separated variable file will be created called **bat_dr.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



23. Financial report - Directorate

Menu: Reports – Financial – Batches – Directorate

The Directorate report will breakdown the expenditure on orders by Directorate.



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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

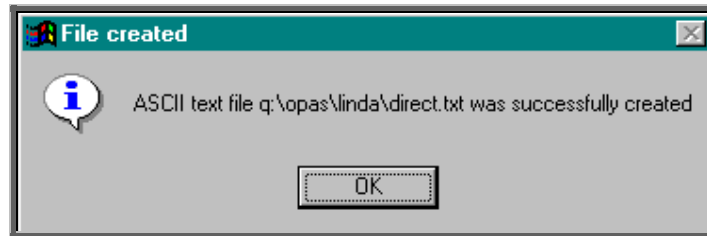
Printer

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

New User NHS Trust				
Gross Amount Spent by Directorate				
01/01/2001 to 31/10/2003				
Speccode	Directorate	IP	OP	Total
PAED	Paediatrics		352.50	352.50
	Total		352.50	352.50
12345678	Trauma & Orthopaedic		239.37	239.37
			64.51	64.51
			328.29	328.29
		2.17	2.17	2.17
			14.38	14.38
			363.94	363.94
			363.94	363.94
			64.08	64.08
			264.35	264.35
			25.85	25.85
			338.94	338.94
	Total	2.17	2,067.65	2,069.82

File

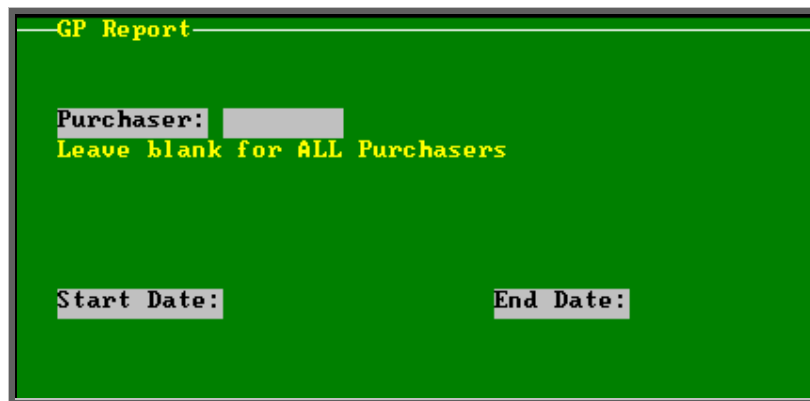
A comma separated variable file will be created called **direct.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



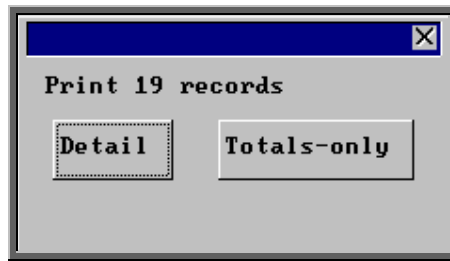
24. Financial report - GPs

Menu: Reports – Financial – Batches – GPs

The GPs report will analyse the expenditure on orders by the patients GP.



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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

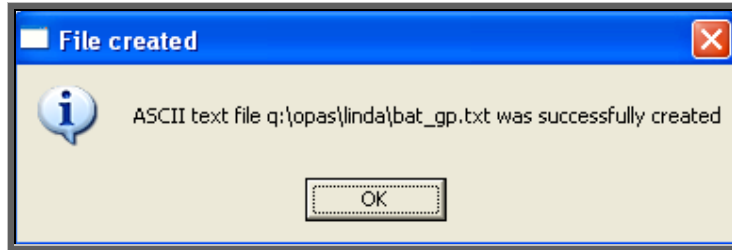
Printer

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

New User NHS Trust GP Practice Spend - All Purchasers 01/01/2001-31/10/2003				
Date of Order	Order No	Sur name	Doctor	Gross:
26/04/2003	G00395	ELOWED	ANDERSON MG	170.67
Total for: LENSFIELD MEDICAL PRAC.				170.67
				Count 1
26/04/2003	G00397	FERGIVAL	FLAXMAN PA	64.86
Total for: LUTTERWORTH HEALTH CENTRE				64.86
				Count 1

File

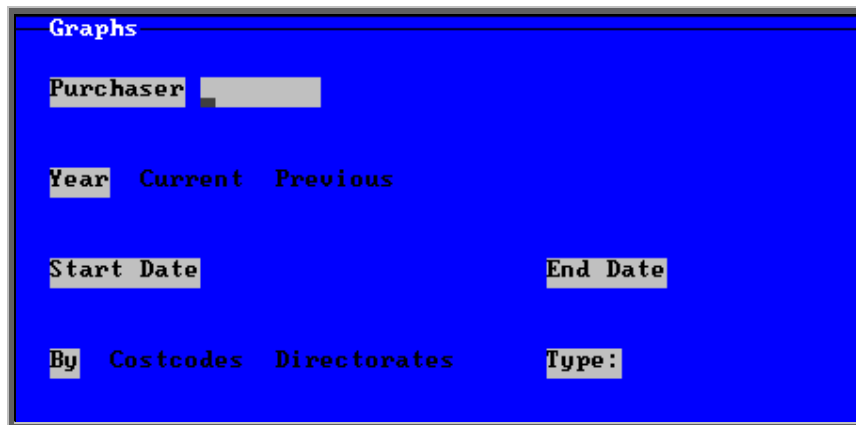
A comma separated variable file will be created called **bat_gp.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



25. Financial report - Graphs

Menu: Reports – Financial – Batches – Graphs

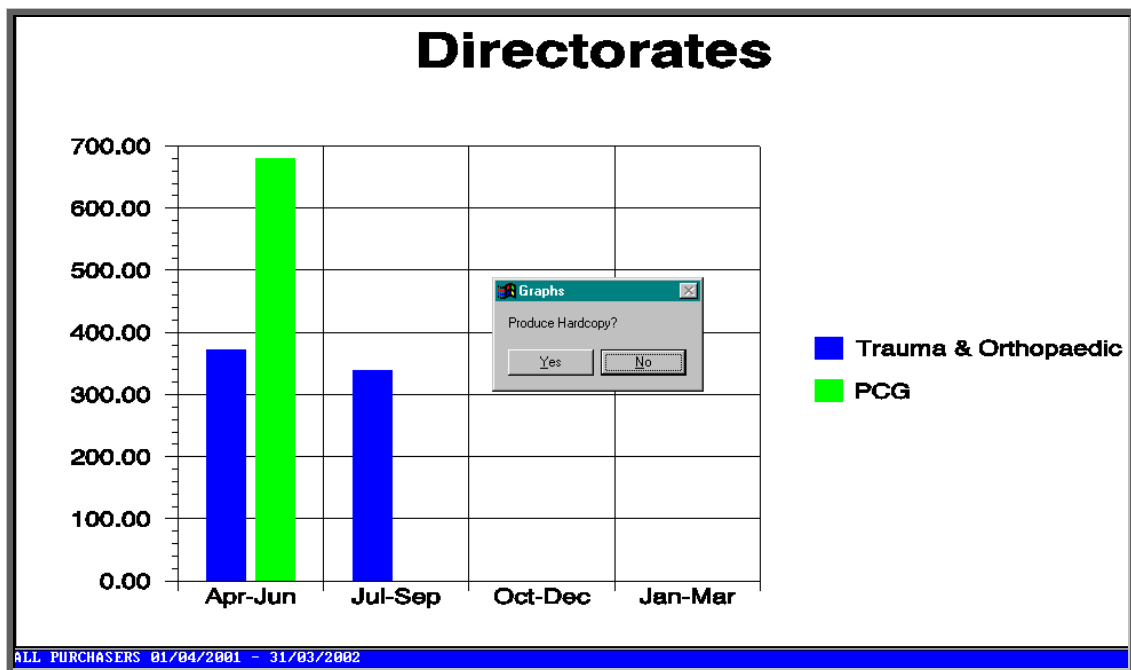
The **Graphs** report will analyse the expenditure on orders and display the information in graph form. The information can be analysed by Orthosis Codes or Directorate.



- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select Current year or Previous year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select what the data is to be analysed by i.e. on Costcodes (Orthosis Code) or Directorates. Use the space bar to move between options

- select Type M to see the full year broken down by month
- select Type Q to see the full year broken down by quarters
- select Type 1 to see the first quarter (1 April – 30 June) broken down by month
- select Type2 to see the second quarter (1 July – 30 September) broken down by month
- select Type3 to see the third quarter (1 October – 31 December) broken down by month
- select Type 4 to see the fourth quarter (1 January – 31 March) broken down by month

Below is an example produced by selecting Previous year, Directorate and Type Q



The graph will appear on the screen, but you have the option to print a hardcopy.

26. Financial report - Invoices

Menu: Reports – Financial – Batches – Invoices

The **Invoices** report shows details of orders where the supplier invoices have been received.

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

Note. The date range here is looking at the supplier's invoice date and **not** the date the order was raised.

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

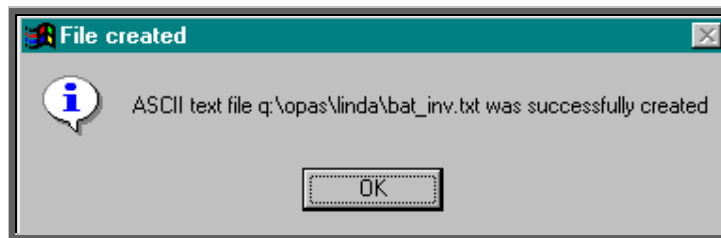
Printer

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

New User NHS Trust					
Purchase Invoices for Payment (NHS TRUST)					
01/01/2000 to 31/10/2003					
Order No	Surname	Date	Cost	Hsp	Ord No
G00359	BROWN	19/06/2003	352.50		
G00403/R1	SMITH	30/09/2003	338.94		
Grand Total			691.44		

File

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



27. Financial report - Orders

Menu: Reports – Financial – Batches – Orders

The Orders report shows details of orders raised over a specific period.

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY
- select NO for the standard order report

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

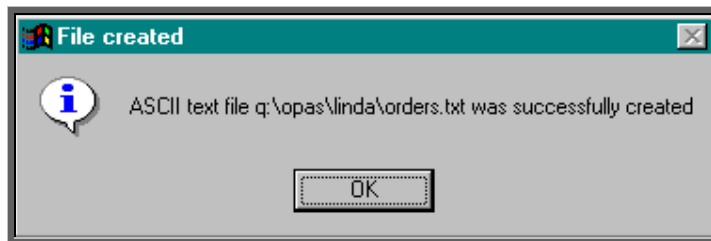
Printer

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

New User NHS Trust										
Orders raised by Trauma & Orthopaedic										
01/01/2000 to 31/12/2002										
Order Date	Order No	Supplier	Description	Spec. code	Consultant	Received	Sup Inv No	Inv Date	Paydate	Gross
11/07/2001	1234567	Medistox Ltd	COLLAR	12345678	Mr Surgeon	20/08/2001	3401011	12/07/2001	27/04/2003	2.17
28/05/2001	G00351	Hal o Healthcare Ltd	Boots	12345678	Mr Surgeon	10/05/2002	55442	15/04/2003	27/04/2003	239.37
31/10/2001	G00357	Hal o Healthcare Ltd	Shoes	12345678	Mr Surgeon	05/08/2002				103.26
26/06/2002	G00367	Jane Saunders & Mann	Collar	12345678	Mr Surgeon	01/08/2002				14.69
27/06/2002	G00368	Jane Saunders & Mann	Shoes	12345678	Mr Surgeon	09/10/2002				94.59
12/07/2002	G00369	Jane Saunders & Mann	Shoes	12345678	Mr Surgeon	23/07/2002	56756544	05/02/2003	27/04/2003	363.94
14/08/2002	G00373	Peacocks Medical Gro	KNEE BRACE	12345678	Mr Surgeon	15/08/2002	01016	09/10/2002	27/04/2003	346.87
11/09/2002	G00375	Jane Saunders & Mann	Shoe	12345678	Mr Surgeon	08/10/2002				142.42
12/06/2001	W1234	Hal o Healthcare Ltd	SHOES	12345678	Mr Surgeon	10/05/2002	01010	13/06/2001	31/03/2003	328.29
Total for Mr Surgeon										1,635.60
Count										9

File

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



If **Count**, **Net**, **Gross** or **Sell** are selected, a spreadsheet will be produced analysing the orders by the age of the patient.

Select **Count** if you want to know how many orders were raised.

Select **Net** if you want to know the value of the orders excluding VAT.

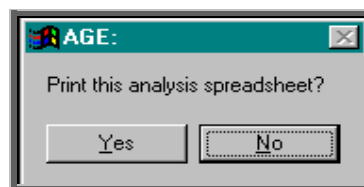
Select **Gross** if you want to know the value of the orders including VAT.

Select **Sell** if you want to know the value the goods were sold on for.

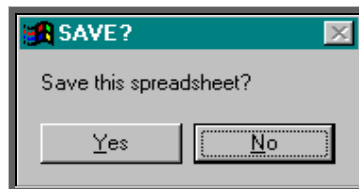
Below is an example of a spreadsheet produced by selecting **Net**.

	1	2	3	4	5	6	7	8
1	Age Analysis							
2								
3	01/01/2000 - 01/01/2001							
4	Net Cost							
5		0-5	6-16	17-30	31-50	51-65	66+	Totals
6	1		£1,068.00	£402.81	£1,188.79	£618.06	£193.47	£3,471.13
7	2			£313.50				£313.50
8	3				£174.02			£174.02
9	-----							
10	Totals		£1,068.00	£716.31	£1,362.81	£618.06	£193.47	£3,958.65
11	=====							
12								

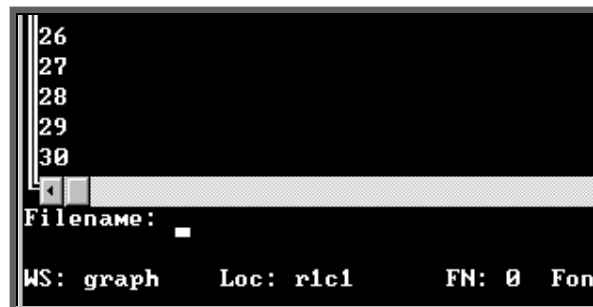
You will be asked if you wish to print the spreadsheet.



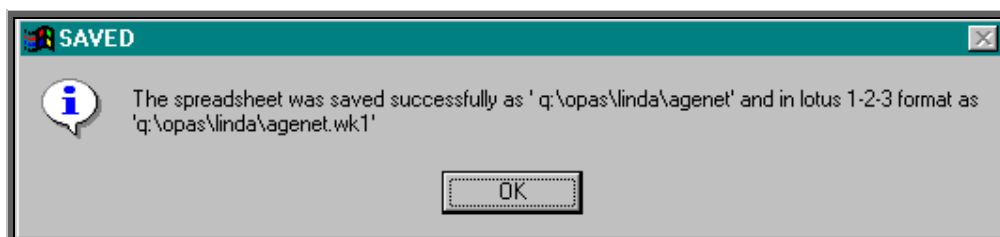
You will then be asked if you wish to save the spreadsheet.



If you select **Yes**, you need to enter a filename at the bottom of the screen.



This will then be saved with that name within your personal directory of OPAS.



29. Financial report – Payments

Menu: Reports – Financial – Batches – Payments

This report will show those orders that have been passed for payment between the selected dates

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

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

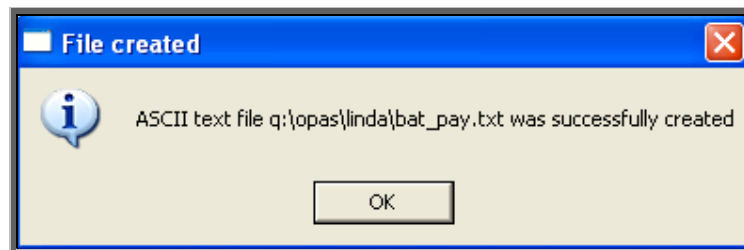
Printer

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

New User NHS Trust									
Invoices Passed for Payment									
01/01/2000 to 31/10/2003									
Pay date	Date of	Order	Order	No Sup	Inv	No Invoice	Date	Net	Gross
31/03/2003	12/06/2001	W1234		01010		13/06/2001		279.39	328.29
27/04/2003	28/05/2001	G00351		55442		15/04/2003		203.72	239.37
Total for Halo Healthcare Ltd								483.11	567.66
27/04/2003	28/05/2001	G00350		11211		01/04/2003		12.24	14.38
Total for Tyco Healthcare (UK) Ltd								12.24	14.38

File

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



29. Financial report – Profit

Menu: Reports – Financial – Batches – Profit

The **Profit** report is used to show the profit (if any) on those orders where the Purchaser is being re-charged for the appliance and/or service.

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

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

Once the data has been found you have the option to see the report on screen or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen** or **Printer**. Make another selection or press **Esc** again to return to the menu.

Printer

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

New User NHS Trust Profit report for ANOTHER 01/01/2001 to 31/10/2003					
Order No	Purchase Total	Purchase VAT	Sales Total	Sales VAT	Profit
G00350	14.38	2.14	14.02	2.45	1.29
G00369	363.94	54.20	354.84	62.10	32.59
G00373	346.87	51.66	355.12	62.14	49.98
G00383	14.69	2.19	14.69	2.57	1.73
VM234	328.29	48.90	330.78	57.88	41.36
Total s	1068.17	159.09	1069.45	187.14	126.94

30. Financial report – Progress

Menu: Reports – Financial – Batches – Progress

The **Progress** report provides the information needed to chase suppliers that have not delivered goods by the expected supply date.

Order Progress

Supplier: Both Non-Stock Stock

Start Date **End Date**

- select **Both**, **Non-Stock** or **Stock** depending on which orders you wish to chase. Press the space bar to move between the options
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY

Note. The date range here is looking at the expected supply date and **not** the date the order was raised. This means that you can actually be proactive and put a date in the future in the **End date** so that orders that were due to be delivered by the end of the week and are not in yet will show on the report.



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

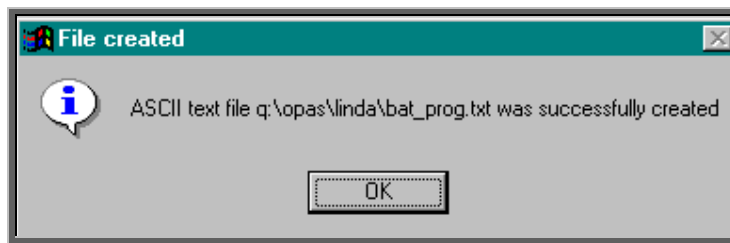
Printer

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

New User NHS Trust Batch Progress Report 01/01/2000 - 31/10/2003						
Supplier	Patient	Order No	Orth Code	Order date	Req. By	Expected
Bolton Bros. (Surg. Shoemakers) Ltd	HUCKER	EXT00394	ABC123	28/04/2003	26/05/2003	.....
Halo Healthcare Ltd	HARTIGAN	G00393	ABC123	28/04/2003	26/05/2003	.....
Tyco Healthcare (UK) Ltd	BLOWED	G00395	XYZ690	28/04/2003	05/05/2003	.....
Gilbert & Mellish Ltd	BLOGGS	00363	ABC123	25/06/2002	23/07/2002	.....
JJR Orthopaedic Services	BLOGGS	G00405	ABC123	03/09/2003	01/10/2003	.....
Medistox Ltd	FEROVAL	G00397	111111	28/04/2003	12/05/2003	.....
Peacocks Medical Group Ltd	BLOGGS	G00389	ABC123	25/04/2003	23/05/2003	.....
Peacocks Medical Group Ltd	SMITH	G00390	ABC123	25/04/2003	23/05/2003	.....
Peacocks Medical Group Ltd	PARGETTER	G00409	ABC123	04/09/2003	16/10/2003	.....
Ortho C Fab	BLOGGS	G00371	ABC123	25/07/2002	22/08/2002	.....
Remploy Healthcare	BLOGGS	G00358 R2	999999	10/06/2002	05/05/2003	.....
	VIREN	G00391	ABC123	25/04/2003	23/05/2003	.....

File

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

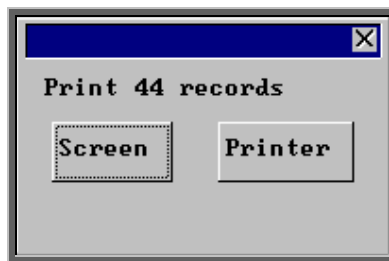


31. Financial report – Purchases

Menu: Reports – Financial – Batches – Purchases

The **Purchases** report is a quick way of getting totals of expenditure, analysed by Referrer, Directorate, GP, Orthosis Code or supplier. Order details cannot be obtained using this report.

- select the **Purchaser** required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select what the data is to be analysed by i.e. on **Referrer**, **Directorate**, **GP**, **Orthosis_code** or **Supplier**. Use the space bar to move between options



Once the data has been found you have the option to see the report on screen or to be printed

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen or Printer. Make another selection or press **Esc** again to return to the menu.

Printer

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

Below is an example report generated by selecting all purchasers and analysing by Directorate.

New User NHS Trust ALL PURCHASERS 01/ 01/ 2000 - 01/ 01/ 2001			
Directorate	No of Orders	Net :	Gross :
POG	7	853.42	1,002.76
PCT	2	85.00	99.88
Surgery	6	283.50	333.11
Trauma & Orthopaedic	29	5,007.06	5,883.32
Grand Total	44	6,228.98	7,319.07

32. Financial report – Quarterly

Menu: Reports – Financial – Batches – Quarterly

The **Quarterly** report will analyse the expenditure on orders and display the information in spreadsheet format. The information can be analysed by Orthosis Code or Directorate.

Quarterly Analysis

Purchaser

Year Current Previous Start Date End Date

For:

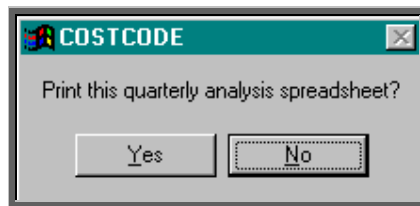
Using Net Gross Sell Type:

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select Current year or Previous year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select what the data is to be analysed by i.e. on Costcode (Orthosis Code) or Directorate. Use the space bar to move between options
- select whether the value shown should be Net (excluding VAT), Gross (including VAT) or Sell (price sold on when re-charging)
- select Type Q to see the full year broken down by quarters
 - select Type 1 to see the first quarter (1 April – 30 June) broken down by month
 - select Type2 to see the second quarter (1 July – 30 September) broken down by month
 - select Type3 to see the third quarter (1 October – 31 December) broken down by month
 - select Type 4 to see the fourth quarter (1 January – 31 March) broken down by month

Below is an example produced by selecting Previous year, Directorate, Net and Type Q

	1	2	3	4	5	6	7	8	9	10	11
1	Cost-code analysis										
2	ALL PURCHASERS										
3	01/04/2001 - 31/03/2002										
4											
5			Q1 Count		Q2 Count		Q3 Count		Q4 Count		Total Count
6	PCG	£577.68	3		£288.65	3				£577.68	3
7	Trauma & Orthopaedic	£315.98	6						2	£604.63	11
8	-----										
9	Totals	£893.66	9		£288.65	3			2	£1,182.31	14
10	-----										
11											

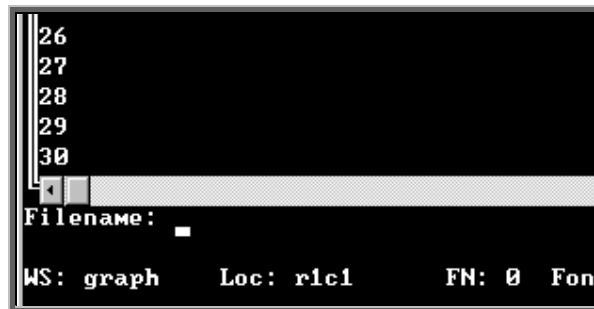
You will be asked if you wish to print the spreadsheet.



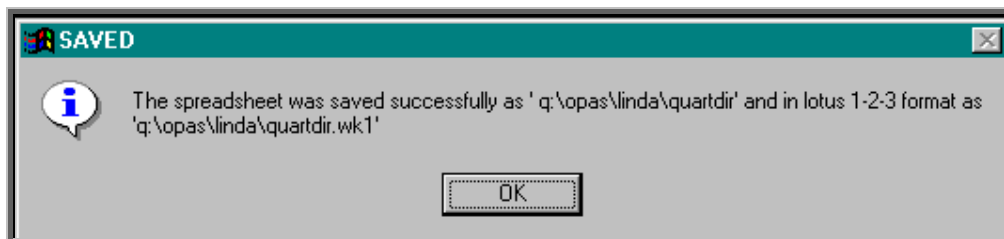
You will then be asked if you wish to save the spreadsheet.



If you select Yes, you need to enter a filename at the bottom of the screen.



This will then be saved with that name within your personal directory of OPAS.



33. Financial report – Received

Menu: Reports – Financial – Batches – Received

The **Received** report shows which orders have been received over a specific time period.

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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

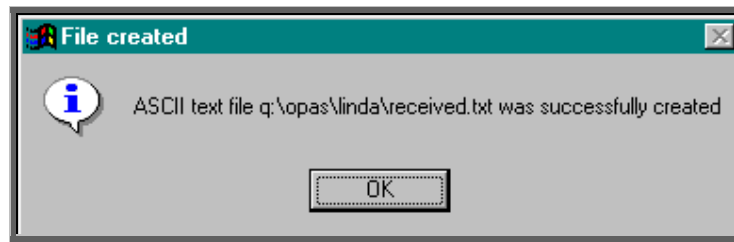
Printer

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

Received Items					
01/ 09/ 2003 - 31/ 10/ 2003					
Order No	Schedule Number	Description	VAT	Net	Gross
EXT00401	A135-80103BK	CPAL FOOT ABET SHOE 80-103 BLACK Sz 35	S	425.25	499.67
EXT00402	A135-80103BK	CPAL FOOT ABET SHOE 80-103 BLACK Sz 35	S		0.00
G00403/R1	A1a	Custom made boots, lightweight construction, single	S	288.46	338.94
Total for VAT code				713.71	838.61

File

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



34. Financial report – Reclaim VAT

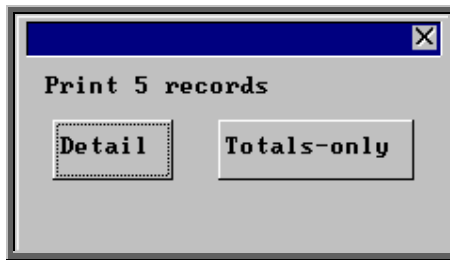
Menu: Reports – Financial – Batches – Reclaim VAT

The **Reclaim VAT** report will show details of lines within orders where the VAT rate is R for Reclaim.



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

Note. The date range selected is looking at the date the invoices were passed for payment (i.e. the Paydate) and **not** the date the order was raised. This is because VAT should not be reclaimed before it is paid.



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

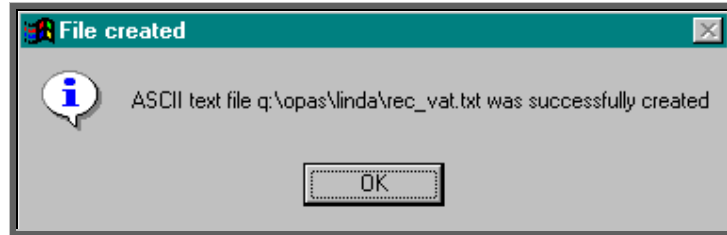
Printer

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

New User NHS Trust Reclaim VAT report for invoices passed 01/01/2003-31/10/2003						
Order No	Supplier	Appliance Code	Directorate	Net	Gross	VAT
G00359	078	A100b	Paediatrics	300.00	352.50	52.50
G00370	096	A1a	Trauma & Orthopaedic	309.74	363.94	54.20
G00379	201	A1a	Trauma & Orthopaedic	224.98	264.35	39.37
Grand Total				834.72	980.79	146.07

File

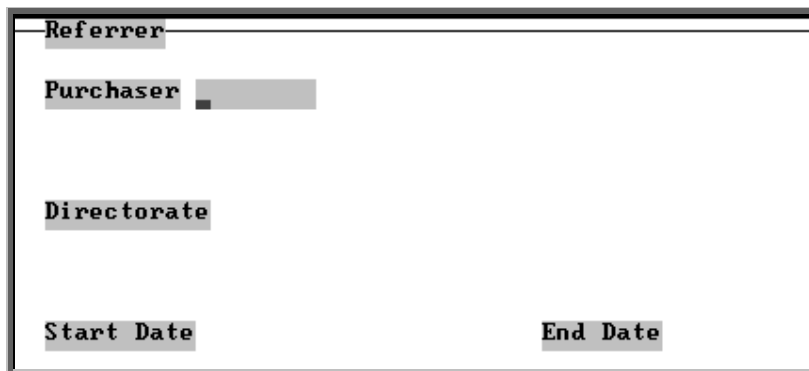
A comma separated variable file will be created called **rec_vat.txt**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



35. Financial report - Referrers

Menu: Reports – Financial – Batches – Referrers

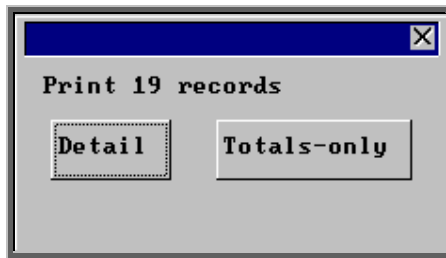
The **Referrers** report will also breakdown the expenditure on orders by the patients Referrer, but will allow you select a specific **Purchaser** and/or **Directorate**. A specific Referrer cannot be selected using this report. For specific Referrers use the **Clinics** report.



Referrer	
Purchaser	
Directorate	
Start Date	End Date

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

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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

Printer

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

New User NHS Trust Monthly Report To Purchaser : 01/ 01/ 2000 to 31/ 10/ 2003				
Code	Hosp No	Patient Name	Order No	Gross
XYZ890	WDFNEQW	MASTER S BROWN	G00359	352.50
111111	TCRUS004	M SS T SM TH	G00403/ R1	338.94
Total for A N Other Paediatrics			Sum	691.44
			Avg	345.72
			Count	2
999999	G8355370	D EYRE	23456	64.51
999999	01232195	J HAM LTON	1234567	2.17
XYZ890	G9202344	D FREAK	G00351	239.37
ABC123	TEVP000010	MR M CRAVEN	G00370	363.94
ABC123	G0230753	R BENNET	G00377	64.08
ABC123	G123456	M SS J COLE	G00379	264.35
111111	12345QWERT	MR K BLOGGS	G00387	25.85
			Y	
Total for M Surgeon Trauma & Orthopaedi c			Sum	1,024.27
			Avg	146.32
			Count	7

File

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



36. Financial report – Returns

Menu: Reports – Financial – Batches – Returns

This report will show those orders that have been returned to the supplier and why. The report will show all orders that have been returned, regardless of whether a replacement has been booked in.

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

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

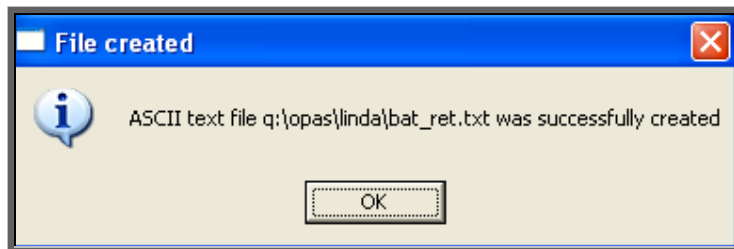
Printer

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

Returns Report 01/04/2002 - 31/03/2003						
Date	Patient	Order	Supp	Description	Orthosi sCode	Reason for return
13/05/2002	GI340163	G00343	075		AEC123	Goods faulty
13/05/2002	XYZ0987654	G00357	012	Shoes	999999	To be finished off
05/06/2002	XYZ0987654	G00357	012	Shoes	999999	To be finished off
10/05/2002	AEC21234	VA234	012	SHOES	AEC123	Different type of shoe needed
01/05/2002	W0FN00W	G00359	078	Shoes	XYZ890	Hbel to be altered
10/05/2002	W0FN00W	G00359	078	Shoes	XYZ890	Fastener to be adjusted
20/05/2002	W0FN00W	G00359	078	Shoes	XYZ890	The left shoe is rubbing
22/04/2002	XYZ0987654	G00358	087	Shoes and adaptions	999999	Patient doesnt like them
13/05/2002	XYZ0987654	G00358	087	Shoes and adaptions	999999	Arrived too late
01/08/2002	G0825852	G00368	096	Testing	AEC123	Wrong size delivered
21/02/2003	G0418296	FG00378	145	Shoes	AEC123	TESTING
28/02/2003	G0418296	FG00378	145	Shoes	AEC123	Wrong goods sent
13/05/2002	G3356370	23456	158	Bra	999999	Wrong size sent
Total for Purchaser : 1 Count 13						
13/05/2002	XYZ0987654	00339	078	Custom shoes	AEC123	Sole to be built up
Total for Purchaser : 54 Count 1						

File

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



37. Financial report – Schedules

Menu: Reports – Financial – Batches – Schedules

The **Schedules** report gives detail of appliances ordered by schedule number. If an item is entered on an order without a schedule number it will not be included in this report.

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

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

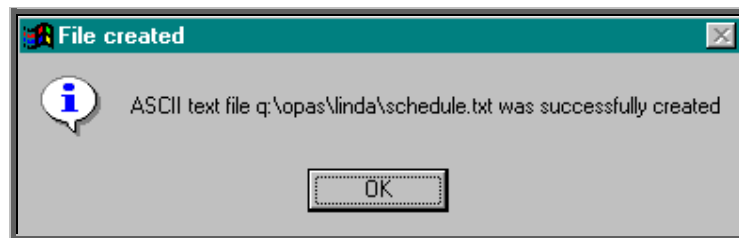
Printer

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

New User NHS Trust Schedules Report 1/ 1/ 2000 - 31/ 12/ 2003				
Order No	Code	Description	Qty	Cost
4 G00350	A135-801	LEVELLING CRADLE, MOULDED TO A CAST, U	1	12.24
G00369	A1a	Custom made boots, lightweight constru	1	309.74
G00373	A1a	Custom made boots, lightweight constru	1	224.98
W1234	A1b	Custom made shoes or sandals	1	254.95
W1234	A42	Addition full or 3/4 non-moulded inlay	1	10.00
W1234	A43a	Add full / 3/4 non moulded inlay shock a	1	14.44
G00373	E088B	BELOW KN POLYPROP COSM. (CUSTOM TO CAS	1	70.23
G00383	STM25X16	soft collar	1	12.50
Total for Purchaser				<u>909.08</u>

File

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



38. Financial report – Statements

Menu: Reports – Financial – Batches – Statements

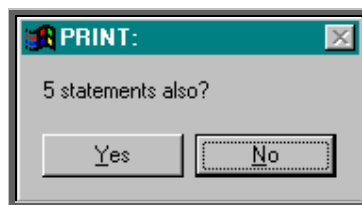
The **Statements** report shows purchase invoices raised within a specific period of time and also offers the option to print those invoices.

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

The report will be automatically sent to the printer.

NHS TRUST Invoice Statement Report 01/11/2003 to 01/11/2003						
Surname	Order No	Hospital No	Received Supplied	Practice	GP PCT	Cost
CRAVEN Shoes	G00370	TEMP000010	28/04/2003	Mr Surgeon	HIRST CI 5E2	1302.00
Total for Mr Surgeon						1302.00
Count						1

You then have the option to print the invoices listed on the report if required.



39. Financial report – Supplier Spend

Menu: Reports – Financial – Batches – Supplier Spend

The **Supplier Spend** report gives details of expenditure broken down by supplier. The information can be broken down by Orthosis Code or Directorate.

The screenshot shows a window titled "Supplier Spend" with a green background. It contains four input fields: "Purchaser:", "Supplier", "Start Date", and "End Date".

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

The screenshot shows a dialog box titled "Which Supplier Spend Report?". It displays "Current selection has 18 records" and two buttons: "Costcodes" and "Directorate".

Select how you want the information to be analysed i.e. by **Costcodes** (Orthosis codes) or **Directorate**

The screenshot shows a dialog box titled "Print 65 records". It displays two buttons: "Detail" and "Totals-only".

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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

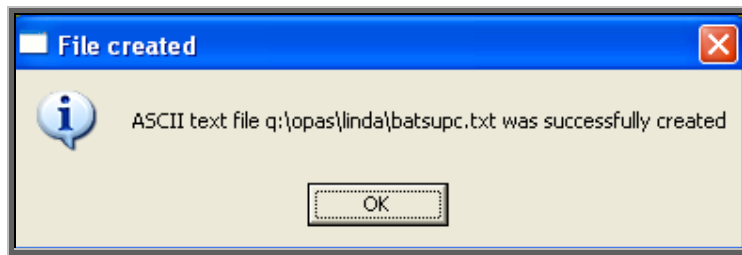
Printer

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

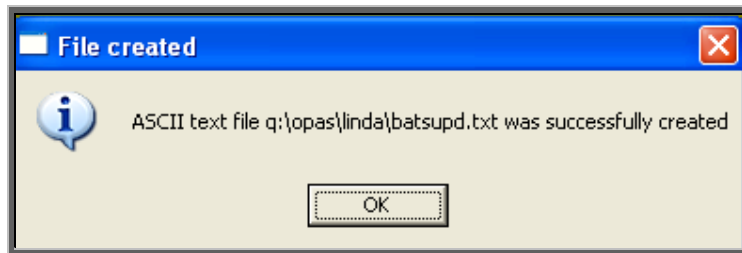
New User NHS Trust Amount Spent by Cost Code 01/ 01/ 2000 to 31/ 12/ 2003						
Supplier		Order No	Cost Code	Cost :		
004	A C Andrews Surgical Foot	EXT00401	ABC123	425.25		
	A C Andrews Surgical Foot	EXT00402	ABC123	0.00		
				Total for Supplier	425.25	
				Count	2	
008	Bolton Bros. (Surg. Shoema	2343234er	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	G00376/ R2	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	G00376/ R1	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	G00376	ABC123	6.78		
	Bolton Bros. (Surg. Shoema	G00376/ R3	ABC123	0.00		
	Bolton Bros. (Surg. Shoema	EXT00394	ABC123	44.00		
				Total for Supplier	50.78	
				Count	6	

File

A comma separated variable file will be created called **batsupc.txt** when analysed by Costcode, and **batsupd.txt** when analysed by Directorate. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



When report analysed by
Cost Code



When report analysed by
Directorate

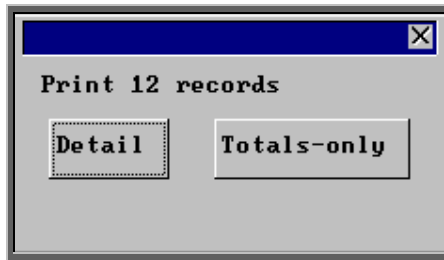
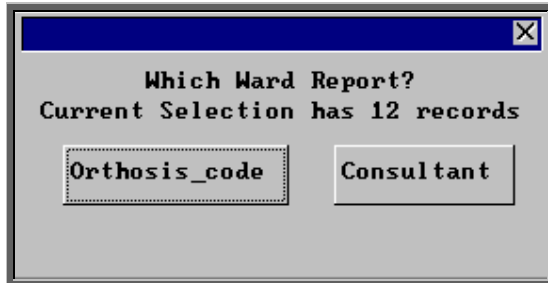
40. Financial report – Wards

Menu: Reports – Financial – Batches – Wards

This report interrogates orders by the information held in the *Ward* field.

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

- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- choose whether you want the information to be sub-totalled by **Orthosis code** or **Consultant**



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select **Screen**, **Printer** or **File**. Make another selection or press **Esc** again to return to the menu.

Printer

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

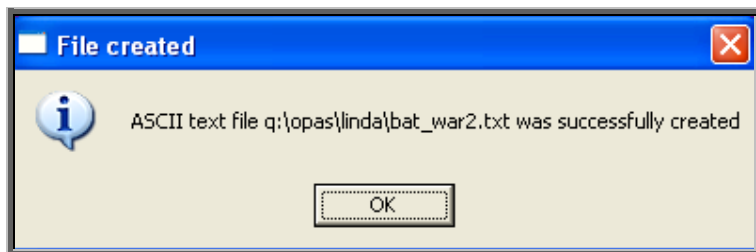
Barnsley District General Hospital				
Ward Report				
01/01/2000-31/03/2003				
Order Nb	Orthosis Code	Ward	Consultant	Gross
G00350	999999	Ward 1	Mr Surgeon	14.38
G00358			A N Other	651.58
			Total	665.96
G00373		Ward 3	Mr Surgeon	346.87
Total for Orthosis Code: 999999				1012.83
				Count 3
W1234	ABC123	Ward 1	Mr Surgeon	328.29

File

A comma separated variable file will be created called **bat_ward.txt** when analysed by Orthosis Code and **bat_war2.txt** if analysed by Consultant. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



When report analysed by Orthosis Code

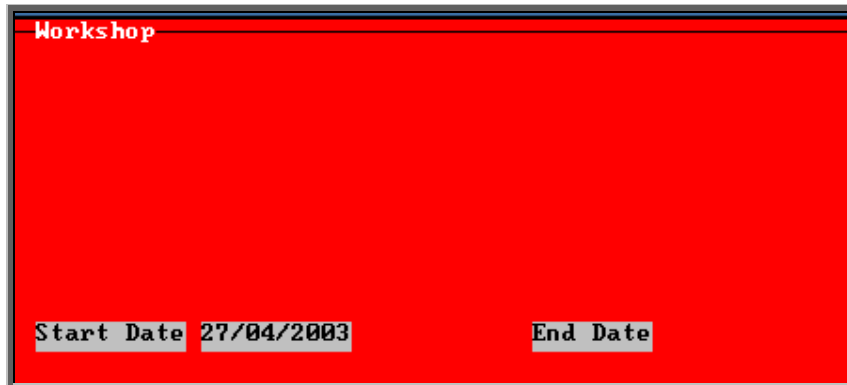


When report analysed by Consultant

41. Financial report – Workshop

Menu: Reports – Financial – Batches – Workshop

This report lists those orders that have been supplied from the Workshop (i.e. supplier 999) and shows how much time has been spent on them. (Supplier 999 is an NSI supplier set up as an internal supplier for those hospitals that have their own workshop.)



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

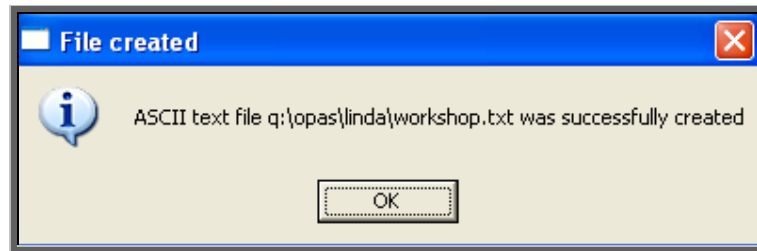
Printer

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

Order list for workshop orders supplied between 01/ 01/ 2000-31/ 12/ 2003 Printed 01/ 11/ 2003					
Hospital No	Order No	Supply Date	Technician	Time:	
123456	QWERTY	G00387	04/ 03/ 2003	BERT	
01232195		1234567	13/ 05/ 2002		
				Total for BERT	<u>0</u>
				Count	2
ABC21234	VM234	G00358	13/ 05/ 2002	FRED	
XYZ0987654		G00351	29/ 05/ 2002		
G9202344			13/ 05/ 2002		
				Total for FRED	<u>0</u>
				Count	3

File

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



42. Financial report – YTD (Year to Date)

Menu: Reports – Financial – Batches – YTD

The YTD report is a very complex report and can take a considerably long time to run. With this in mind we have introduced a selection criteria screen so that you can select the aspects of the YTD report that you want. The more options you select, the longer the report will take to be produced.

- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select Current year or Previous year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select the Month (it will default to last month). Use the space bar to move between options
- select whether to Perform Referrer Analysis (this will give you the monthly spend, monthly budget and cumulative YTD spend for each Referrer)
- select whether you want to report on orders Ordered within the period (i.e. using date of order) or those Received within that time. Use the space bar to move between options

- select YTD (Year to Date) or MTD (Month to Date)

You will then be taken to the following selection screen:

YTD Selection										
Calculation	Year To Date						Current Month			
	Count		Net		Gross		Count		Net	Gross
Cumulative orders	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Not received	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Not cleared	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Cleared	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Cleared this year	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No

OK to continue? No Yes

This screen is used to select the required calculations for the YTD report.
 Selecting fewer calculations will speed up the report production, but will also result in less information on the report.

All the options will default to Yes. Move around the table with the down arrow key, changing those options you don't need to No by pressing the space bar.

Cumulative orders

will show the total number of orders (entered or received – depending what you selected), total net amount and total gross amount, for the year to date and the current month, if selection left at Yes.

Not received

will show the number of orders, total net amount and total gross amount for orders not received, for the year to date and the current month, if selection is left at Yes.

Note: This option is not applicable if you have selected Received.

Not cleared

will show the number of orders, total net amount and total gross amount for orders where the invoice has not been received, for the year to date and the current month, if selection left at Yes.

Cleared

will show the number of orders, total net amount and total gross amount for orders where the goods and the invoice have been received, for the year to date and the current month, if selection is left at Yes.

Cleared this year

will show the number of orders, total net amount and total gross amount for orders where the goods and the invoice have been received within the period selected, for the year to date and the current month, if selection is left at Yes.

Note: This option is only applicable if you have selected Received

OK to continue

Highlight Yes and press the **Enter** key when you are happy with your selection criteria.

YTD report produced
selecting Ordered, YTD and
leaving all options as Yes

New User NHS Trust
Year To Date Summary Report
Purchaser : NHS TRUST
Printed : 30/08/2000

	YTD (01/04/2000 - 31/07/2000)			Current month (Jul)		
	Orders	Net Value	Gross Value	Orders	Net Value	Gross Value
Cumulative Total Orders placed :	13	£3,116.39	£3,661.76	4	£1,915.29	£2,250.46
Goods ordered - not received :	2	£1,068.00	£1,254.90	2	£1,068.00	£1,254.90
Goods received - not cleared :	5	£1,312.74	£1,542.46	1	£519.00	£609.82
Goods received - cleared :	6	£735.65	£864.40	1	£328.29	£385.74

YTD report produced selecting Received, YTD and leaving all options as Yes

New User NHS Trust
 Year To Date Summary Report
 Purchaser : NHS TRUST
 Printed : 30/08/2000

	YTD (01/04/2000 - 31/07/2000)			Current month (Jul)		
	Orders	Net Value	Gross Value	Orders	Net Value	Gross Value
Total Orders received :	11	1,771.96	2,082.06	2	959.72	1,127.67
Orders - not cleared :	5	1,036.31	1,217.66	1	631.43	741.93
Orders - cleared current :	2	222.25	261.15	0	0.00	0.00
Orders - cleared other :	4	513.40	603.25	1	328.29	385.74

YTD report produced selecting Received, MTD and leaving all options as Yes

New User NHS Trust
 Month To Date Summary Report
 All Purchasers
 Printed : 01/11/2003

	MTD (01/04/2003 - 30/04/2003)		
	Orders	Net Value	Gross Value
Total Orders received :	15	1,886.48	2,216.61
Orders - not cleared :	11	1,284.62	1,509.43
Orders - cleared current :	2	67.14	78.89
Orders - cleared other :	2	534.72	628.29

When the report is run on Received (like the 2 examples on this page), the report identifies between those orders where the invoices were passed in the same month as they were received (Orders – cleared current) and those where the invoices were passed in other months (Orders – cleared other).

43. Patients reports – Batches

Batch reports are report templates that are designed to be quick and easy to run. There are currently 3 different batch reports analysing patient information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

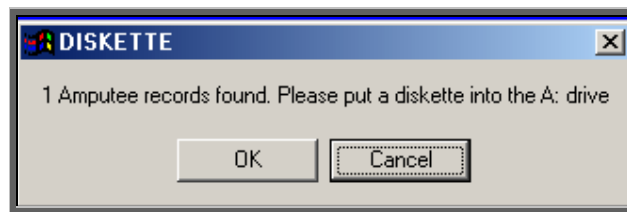
44. Patients report – Amputee

Menu: Reports – Patients – Amputee

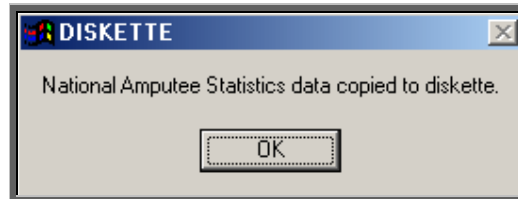
This screen is used to select the criteria for producing the National Amputee Statistics disk. Make sure you have a disk available before you continue.

- select Current or Previous Year (the year runs from Jan – Dec)
- select the appropriate Quarter from the pop-up list

- the Start and End dates will fill automatically, based on the Year and Quarter selected
- press **Ctrl-Enter** to continue



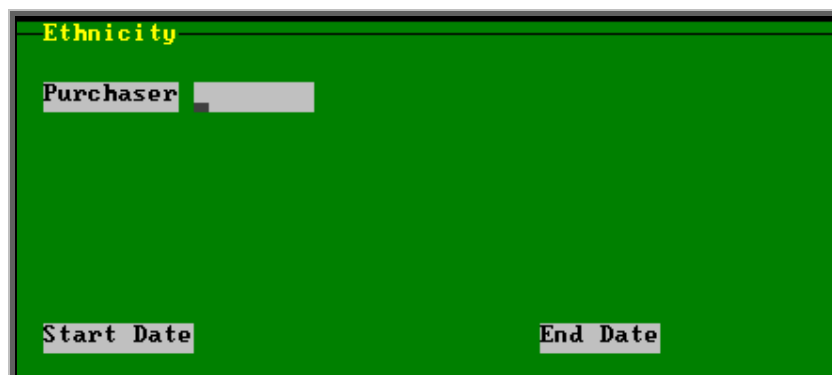
- place a disk in your computer and click on OK
- you will be informed when all the data has been transferred to the disk



45. Patients report – Ethnicity

Menu: Reports – Patients – Ethnicity

This report will look at patients entered between the date range selected and analyse the ethnicity of those patients. The results will be displayed in spreadsheet format.



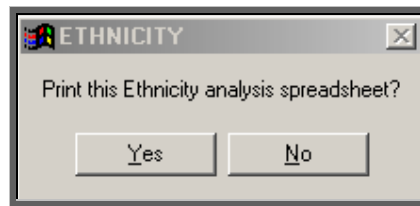
- select the Purchaser required from the pop up list. Alternatively press **Esc** to make the pop up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY

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

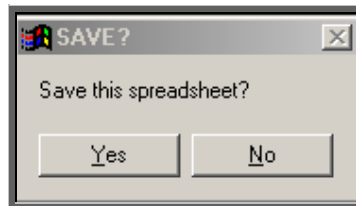
Below is an example of a spreadsheet produced by selecting the Ethnicity report

1	2
1	Ethnicity analysis
2	ALL PURCHASERS
3	01/01/1999 - 31/12/2003
4	
5	Ethnicity Code
6	Count
7	-----
8	00 5
9	01 1,845
10	02 8
11	04 8
12	-----
13	1,866.00
14	=====
15	Printed 1/11/2003 by LINDA
16	

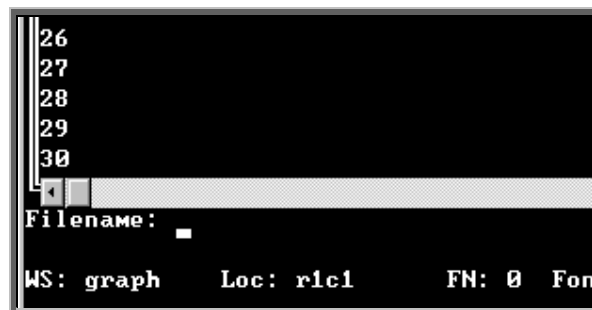
You will be asked if you wish to print the spreadsheet.



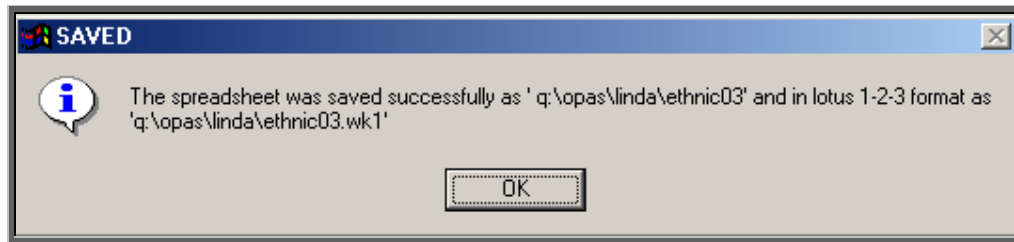
You will then be asked if you wish to save the spreadsheet.



If you select Yes, you need to enter a filename at the bottom of the screen.



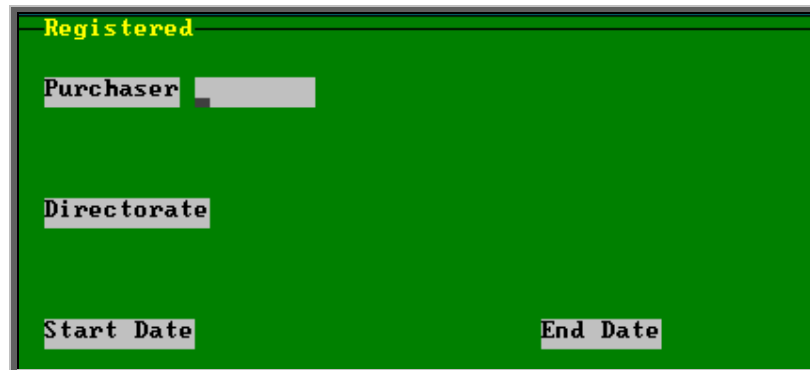
This will then be saved with that name within your personal directory of OPAS.



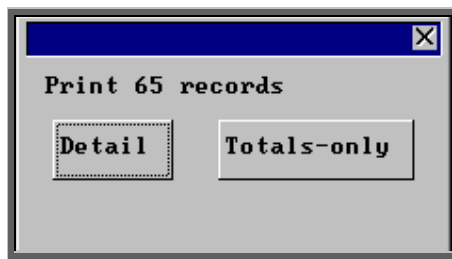
46. Patients report – Registered

Menu: Reports – Patients – Registered

The **Registered** report gives details of patients registered (i.e. entered onto OPAS) within a specific time period.



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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

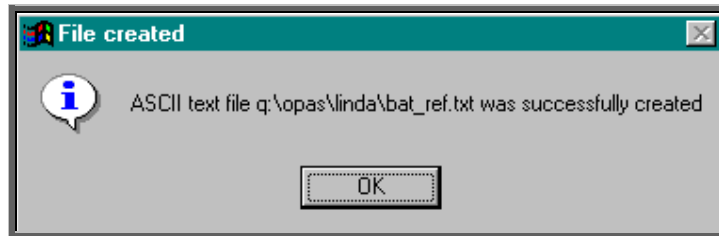
Printer

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

Purchaser	Directorate	Hospital No	Surname	Registered:	GP ref
		KL123456	VALE	29/ 04/ 2002	
		1134939	WATTERSON	08/ 10/ 2002	E629
		FRESC123	WHOSANE	05/ 11/ 2002	
Directorate Total					
Count 3					
	PCT	G8221217	JONES	15/ 01/ 2001	G8310517
		G8373080	FREDRI CK	25/ 11/ 2002	G8399420
		G8809404	HALFH DE	25/ 11/ 2002	G8399420
Directorate Total					
Count 3					
	Trauma & Orthopaedic	FRED0123	BLOGGS	25/ 01/ 2000	
		TMP000005	BLOGGS	25/ 01/ 2000	
		98765TYU7	BLOGGS	11/ 04/ 2000	
		7654321	BLOGGS	11/ 04/ 2000	
		G8901446	YOUNG	28/ 09/ 2000	

File

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



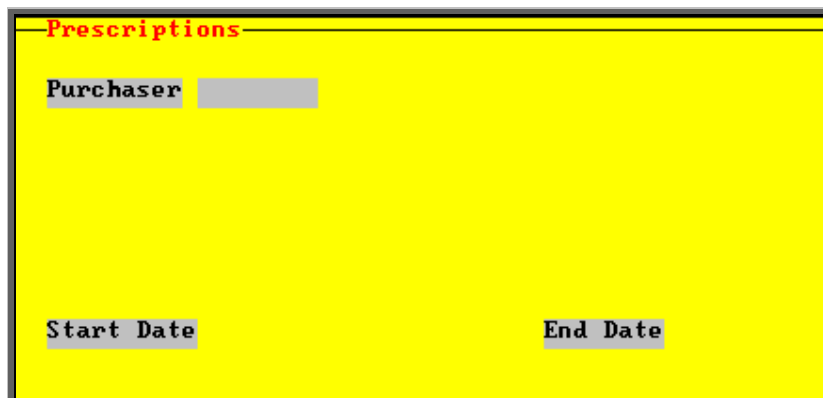
47. Prescriptions reports – Batches

Batch reports are report templates that are designed to be quick and easy to run. There are currently 3 different batch reports analysing prescription information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

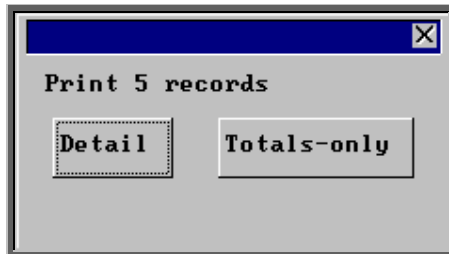
48. Prescriptions report – Charges

Menu: Reports – Prescriptions – Charges

On the order screen you have the ability to record details of prescriptions paid. The **Charges** report will show this information covering a specific period in time.



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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

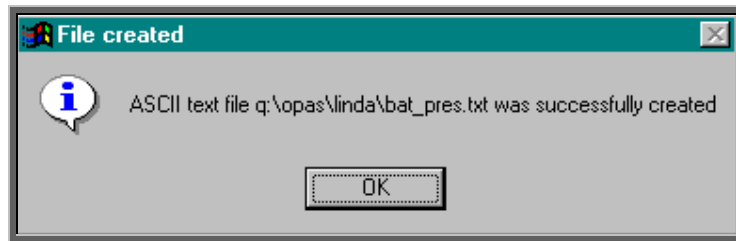
Printer

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

Prescription Charges Collected 01/ 01/ 2001 - 31/ 12/ 2002					
Patient Name	Hospital No	Order No	Orthosis Code	Date of Order	Amount :
DI EYRE	G8355370	23456	999999	05/ 06/ 2001	12.10
JEANETTE HAM LTON	01232195	1234567		11/ 07/ 2001	12.10
M SS TESSA SM TH	TCRL6004	G00373		14/ 08/ 2002	35.20
Total for Code					59.40

File

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

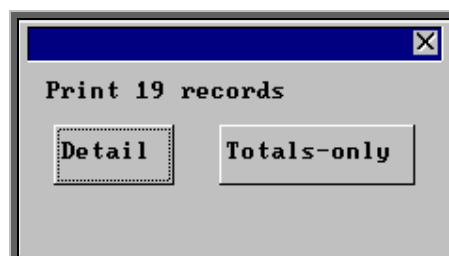


49. Prescriptions report – Expired

Menu: Reports – Prescriptions – Expired

This report will provide a list of prescriptions that have expired between the chosen dates.

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



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



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

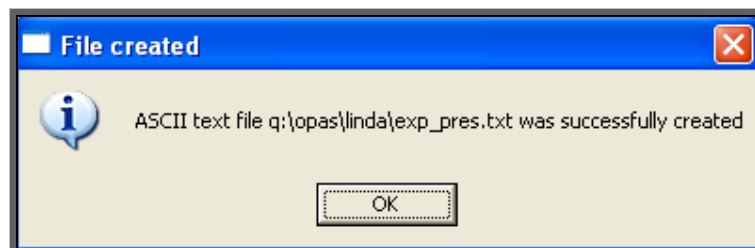
Printer

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

Prescriptions that expired between 01/02/2003 - 28/02/2003				
Patient	Hbsp Nb	Date:	Length	Expired
ELOGGS, FRED	XYZ0987654	01/02/1998	5	01/02/2003

File

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



50. Prescriptions report – New

Menu: Reports – Prescriptions – New

This report will provide a list of new prescriptions that have been entered between the chosen dates.

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

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

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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page.

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

Press **Esc** to abandon looking at the report on screen. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

Printer

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

Prescriptions added to system between 01/01/2003 - 31/03/2003			
Consultant	Patient	Hbsp No	Length
M Surgeon, Trauma & Orthopaedic	ELOWED, ALBY	TMP000025	1
M Surgeon, Trauma & Orthopaedic	WIOSANE, NASSER	PRESC123	1
M Surgeon, Trauma & Orthopaedic	WIOSANE, NASSER	PRESC123	1
M Surgeon, Trauma & Orthopaedic	WIOSANE, NASSER	PRESC123	1
M Surgeon, Trauma & Orthopaedic	SMITH, TESSA	TORU6004	1
M Surgeon, Trauma & Orthopaedic	PAWSON, LINDA	LKP12345	3
	Trauma & Orthopaedic	Ont 6	

File

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

