Utilities

1.   Choices – Introduction

Menu: Utilities – Choices

There are a number of options within Choices, which will be covered in detail below.

Choices options are used to customise OPAS. This is where you can enter what is to appear in the pop-up menus that appear throughout the software. Some options need to be entered before the system can be used, since they are referred to by the system when patients, orders etc are entered, but this will be explained in your initial training session.

Most of these options will be completed during the first few months; however you may need to change them or add to them over time and you need to be aware of where this reference data is kept and how to update it.

It is within this section that editing letters will be covered.

Some of the options are within sub-menus so below is a summary of the choices menu.

Choices menu	Sub menu
Appointment	Appointment Outcome
	Contacts
	Days
	Events
	Questions
	Responses
	RTT Status
	Transport
	Wait Types
Classes	
Classify	
Clinician	
Defaults	
Diagnoses	
Directorates	
DSCs	
Finance	Accounts
	Currencies
	Nominal
	Purchaser Codes
	Purchasing Card

GPs	GPs
	PCTs
	Practices
	Local
	Rebuild
History	Descriptions
	Discounts
	E-mails
	Fax
	Fitting
	GRN Reasons
	Items
	Manufacture
	Prices
	Suppliers
	Technicians
Initiators	
Intervention	
Letters	
Medical Conditions	
Mobility	Actions
	Items
	Locations
	Therapists
Note Categories	
Orthosis Codes	
Patients	Counties
	DOR
	Ethnicity
	Exempt
	Interface
	Services
	Titles
	Towns
Purchasers	
Referrer Types	
Referrers	
System	
Wards	

2.   Choices – Appointments

1. Appointment Outcome

Menu: **Utilities – Choices – Appointments – Appointment Outcome**

Enter here all the standard appointment outcomes that you would want to use to record the results of appointments. Four will be set up for you.

    1   Attended
    2   Did not attend
    3   Could not attend
    4   Cancelled by hospital

To add a new appointment outcome click on the 'enter' icon (<u>E</u>dit, <u>E</u>nter)

To update an existing appointment outcome, find the outcome you wish to change and click on the 'update' icon (<u>E</u>dit, <u>U</u>pdate).

2. Contacts

Menu: **Utilities – Choices – Appointments – Contacts**

On the patient record you can add Carbon Copy recipients for the purpose of sending copies of the appointment letter internally to individuals who need to be notified of the appointment e.g. a physiotherapist involved with the patient's care. Those people who you would wish to be add to a patient as a Carbon Copy recipient need to be set up here.

To add a new contact click on the 'enter' icon (<u>E</u>dit, <u>E</u>nter)

To update an existing contact, find the contact you wish to change and click on the 'update' icon (<u>E</u>dit, <u>U</u>pdate).

Reference: Reference is entered automatically

Name: enter the contacts name

Position:	enter their position/job title e.g. Physiotherapist
Location:	enter the department where they work e.g. Rehabilitation
Add1 - Add4	4 address lines available for when the contact is external
Service:	a service can be assigned so that copy letters only print if the patient is assigned to the same service as the carbon copy recipient

3. Days

Menu: Utilities – Choices – Appointments – Days

This holds the names of the days on which clinics are held. Monday to Friday have been set up for you.

4. Events

Menu: Utilities – Choices – Appointments – Events

On the appointment screen there is a field called *Event:*. This field has two purposes. One is to catergorise the type of appointment and against each category allocate set questions and possible responses to be completed after the patient has been seen. The event can also be used for assigning Referral to Treatment (RTT) actions.

Each event can have multiple questions, and questions can have multiple answers.

E.g an event of First Fitting could have a question of 'Did the orthosis fit?' with possible answers of Yes, No – Too small, No – Too big. (I realise this is a very simplistic example but I hope you get the idea.)

To use the *Event* field, you first have to set up the Events, Questions and Responses.

It is best to document what you want to set up before you begin entering them into OPAS because the quickest way is to enter the Questions and Responses before entering the Events.

See notes 5 and 6 below for how to set up the Questions and Responses.

Setting up the Events for questions/responses

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

Event   type in the event

RTT: this field is not relevant to questions/response auditing, but is a mandatory field so pick any opton from the pop-up list

DNA: this field is not relevant to questions/response auditing, but is a mandatory field so pick any opton from the pop-up list

Question   select the first relevant question for the event from the pop-up list of questions

Many   enter 0 (Zero) if only one response can be selected
               Enter 1 (one) if multiple responses can be selected

Continue to select all the questions relevant for the event. When you have finished, press **Esc** to make the question pop-up list dissapear and then press **Ctrl-Enter** to save.

Having defined which questions relate to the event, we now need to define which responses can be offered to those questions selected.

Click on the word Questions above the icons.

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

Response   select all the relevant responses required for this question. When you have finished, press **Esc** to make the response pop-up list disapear and then press **Ctrl-Enter** to save.

Setting up the Events for 18 week journey

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

Event   type in the event

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

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

```
┌Events─────────────────────────────────────────────────────────────┐
│                                                                    │
│   Event Assess                                                     │
│                                                  Start      Stop   │
│  RTT: 20 Subsequent activity - further activities anticipated  N      N      │
│  DNA: 33 Failure to attend                        N      Y      │
│                                                                    │
│                                                                    │
│      ┌Questions──────────────────────────────────────┐            │
│      │Question                              │Many │            │
│      │                                      │     │            │
└─────────┴──────────────────────────────────────┴─────┴────────────┘
```

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

This would then mean that if an appointment

- was linked to a Care Episode

- had an event of 'Assess'

- *Outcome* field updated to Attended

the RTT table would be updated with a code 20

or if an appointment

- was linked to a Care Episode

- had an event of 'Assess'

- *Outcome* field updated to Did not Attend

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

5. Questions

Menu: Utiliites – Choices – Appointments – Questions.

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

> *Question*   type in the question

Continue until all the questions have been entered.

6. Responses

Menu: Utiliites – Choices – Appointments – Responses

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

Response   type in the reponse

Score   enter a score if appropriate (each response can carry a score
                    to indicate the level of satisfication of the answer)

Continue until all the reponses have been entered.

7. RTT Status

Menu: Utiliites – Choices – Appointment – RTT Status

The NHS defined RTT codes have been entered into OPAS. However, if your Trust

has any additional codes, these can be added by clicking on the 'enter' icon
(Edit, Enter).

Code: enter the RTT code for the action

Description: enter a description for the

Start: enter Y if this action starts the clock. Otherwise enter N

Stop: enter Y if this action stops the clock. Otherwise enter N

8. Transport

Menu: Utiliites – Choices – Appointment – Transport

These appear in a pop-up menu in the Patients screen. By recording in the patient
record screen the type of transport required (if any) means that when an appointment
is made for that patient it will remind you that transport needs to be booked and an
internal transport memo will be printed along with the letter to send to the patient.

We have added two transport types for you

1.   No transport required
2.   Ambulance

If you require more, click on the 'enter' icon (Edit, Enter).

Reference   Reference is entered automatically

Description   enter the type of hospital transport

9.   Wait Types

Menu: Utiliites – Choices – Appointment – Wait Types

When you add a patient to the waiting list you are asked to assign a Wait Type (i.e. a priority).   We have set up three for you, but these can be amended or additional Wait Types added.

The three already set up are:

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

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

Type   enter the wait type description

Weighting enter the priority weighting.   Each person on the waiting list is given a score, which is calculated by multiplying the number of days they have been on the waiting list by the weighting of the Wait Type that they were given when added to the waiting list. Therefore, the higher the weighting, the faster their score will increase.

3.   Choices – Classes

Menu: Utilities – Choices – Classes

Items and orthosis codes can be linked to a classification. *Classes* is a method of grouping a number of items together. By attaching classes to both items and orthosis codes a link is created. (See Utilities – Note 4. Classify and Utilities – Note 19. Orthosis codes)

The purpose for this is to show if an orthosis code is applied to an order incorrectly. E.g. If an orthosis code that is linked to class A is entered on an order where the item code is linked to class B, this will show as a mis-match by highlighting the orthosis code red on the order and invoice screen.

To add a new classification, click on the 'enter' icon ▤ (<u>E</u>dit, <u>E</u>nter)

Class: enter a classification identifier (letter A to Z)

Description: enter the description of the classification

4.   Choices – Classify

Menu: Utilities – Choices – Classify

This screen is used to allocate the classifications created in Utilities – Choices – Classes to specific items.

To bring in your OPrice schedule numbers so that they can be classified, click on the 'enter' icon ▤ (<u>E</u>dit, <u>E</u>nter).

Classifying individual items

Each schedule number can be classified individually by finding the relevant number and clicking on the 'update' icon ▤ (<u>E</u>dit, <u>U</u>pdate), and selecting the appropriate classification from the pop-up list.

Classifying a block of items

Alternatively, we can find a range of codes and allocate a classification in bulk. To do this, click on the 'sort' icon ▤ (Sort), and select Code and then Range.
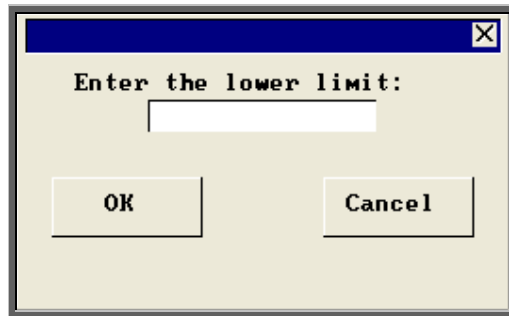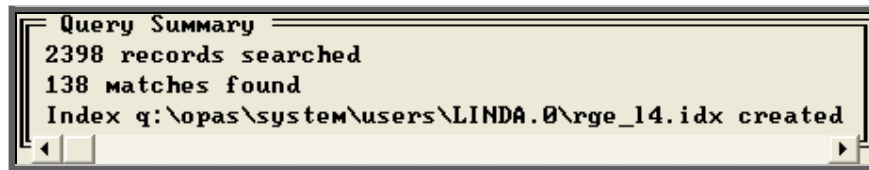
enter the first code in the range
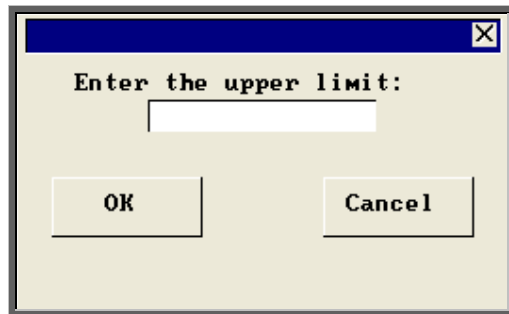
enter the last code in the range

- Once the records in your range have been found a Query Summary box will indicate the number of matches found, and isolate those items.

Query Summary
2398 records searched
138 matches found
Index q:\opas\system\users\LINDA.0\rge_14.idx created

- Press **Esc** to remove the Query Summary box.

- Click on the 'update' icon [ ] (Edit, Update) and choose the appropriate classification code from the prompt.

CLASSIFY
Select CLASS required
Press ESC to abandon process

A   O
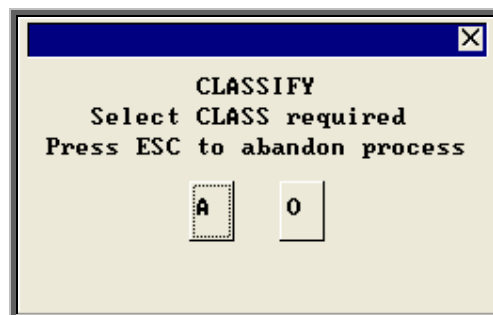
- Click on Yes (type **Y**) to confirm your selection.
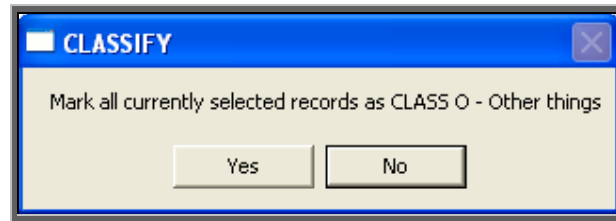
5.   Choices – Clinicians

Menu: **Utilities – Choices – Clinicians**

This is a list of personnel who hold clinics or see patients.

To add a clinician, click on the 'enter' icon (Edit, Enter).

Reference   is entered automatically by the system and cannot be changed

Name   enter the clinician's name

Expertise   move the highlight using the space bar until the correct expertise is
                     selected

Source   enter whether the Clinician is in-house or which contractor they are
                     from

Fee   if there is a set fee for the Clinician, this can be entered here

It is not a good idea to delete clinicians as there could be patient, order and appointment records that make reference to them. If however, a clinician leaves, you can change their reference number so that they appear at the bottom of the pop-up list.

To change their reference number, firstly click on the 'browse' icon (Data, Browse) as it is easier to see which reference numbers are available when the clinicians are viewed as a list.

Click on the clinicians name (that you wish to change) so that they are highlighted, then click on the 'swap' icon (Edit, Swap).

At the bottom of the screen you will be asked for the new reference number.

```
        32
New reference:
Changing Orthotist Reference 8
```

Ensure you type a reference that is not currently being used and press **Enter**.

OPAS will now find all records that have the clinician on them (Patients, Orders, Appointments etc) and update the reference number. Once this is complete, the message below will appear.

```
■ Finished        ☒

Swap process complete

      OK
```
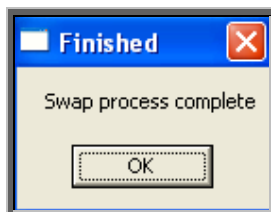
Click on OK to continue.

6.   Choices – Defaults

Menu: Utilities – Choices – Defaults

When entering information, there are certain fields that when you move to, automatically produce a pop-up list on the screen for you to make your selection from.

By going into Utilities – Choices – Defaults, you can decide which pop-ups appear automatically and which only appear if you press the Tab key.

Also, if you usually put the same information in a particular field, then the field can be set to default to that rather than having to pick it from the list or type it every time.

When you go into the Defaults screen you will be presented with a record for each field that you can control.

As the default screen has grown over time, the options don't appear in any logical order.

You may find it useful to click on the 'sort' icon (Sort) and select Screen and then

Whole_File. It is also easier when it appear as a list so click on the 'browse' icon (Data, Browse).

The first four fields are for your information and cannot be changed.

Number   Reference number

Screen   The screen the field appears in

Field   The field name

Pop-up   This informs you if there is a pop-up available for this field

Default   This is the part that you can change to control what happens when you get to the specified field.

- If the word POP is entered in the *Default* field the pop-up will automatically appear

- If the *Default* field is left blank then the pop-up will not automatically appear, and you will need to press the Tab key to see the pop-up list.

- If you wish information to automatically appear in the field this needs to be entered in the *Default* field.

  i)   if the field does not have a pop-up (i.e. notes:) then enter the word you wish to appear automatically i.e. Assess.

  ii)   if the field does have a pop-up available (i.e. Supplier) then enter the reference number you wish to default to. e.g. if you only use one supplier then enter the supplier code in the *Default* field.

  To amend the information in the *Default* field click on the 'update' icon (Edit, Update). You will be asked at the bottom of the screen what you would like to change the *Default* field to. Type in the relevant information, or, if you wish the *Default* field to be left blank so that the pop-ups do not appear for that field, then just press **Enter**.

There are currently 71 defaults that can be customised. These will normally be done for you during training sessions. If you are in any doubt how to change the defaults, contact the Helpdesk for advice.

7.   Choices – Diagnosis

A list of standard medical diagnoses are held here for use on the Care Episode screen.

Menu: Utilities – Choices – Diagnosis

To add a new diagnosis click on the 'enter' icon (Edit, Enter)

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

8.   Choices – Directorates

Menu: Utilities – Choices – Directorates

To add a new directorate click on the 'enter' icon (Edit, Enter)

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

Directorate	enter the directorate name
Group	this enables you to group directorates together (useful for reporting purposes).
Speccode	enter the financial speciality code that is associated with the directorate. If a code is entered here, it will automatically be assigned to any referrer created for that directorate
Card	enter the purchasing card number and expiry date where applicable

The directorates set up here will provide a pop-up list to choose from when adding Referrers.

9.   Choices – DSCs

The national Disablement Service Centres are listed here.

Menu: **Utilities – Choices – DSCs**

If you need to add new DSC's, click on the 'enter' icon (Edit, Enter).

Code   enter the code for the DSC

Name   enter the name of the DSC

10.   Choices – Finance

1. Accounts

This screen holds supplier account information, primarily to record Oracle information for transferring data to Oracle Financials, but blanket/call off numbers and additional copies of orders can be recorded here too.

Menu: **Utilities – Choices – Finance – Accounts**

To add account information click on the 'enter' icon (Edit, Enter).

Code   select the supplier from the pop-up list provided

Name will populate with the name of the supplier selected in the field above

OSN   enter the Oracle Financials OSN number

OPS   enter the Oracle Financials OPS number

Blanket   enter a blanket/call off number for the supplier. This will then appear on patient and stock orders for the supplier

Copies   if you are instant printing orders, you can request additional copies of orders for specific supplier. Enter the number of additional copies required.

2. Currencies

Menu: Utilities – Choices – Finance – Currencies

Information of foreign currencies is entered here for suppliers that deal in a currency than pounds sterling (£).

We have set up Euro, US Dollar and Yen for you, but you may need to update the exchange rate. To do this, click on the 'update' icon (Edit, Update) and move down to the *Exchange Rate* field. Press F8 to clear the field and enter the correct rate.

If you do require more currencies, click on the 'enter' icon (Edit, Enter).

Ref:	is entered automatically by the system and cannot be changed
Currency	enter the name of the currency
Symbol	enter the currency symbol
Position	enter B if the currency symbol goes Before the amount enter A if the currency symbol goes After the amount
Exchange Rate	enter the current exchange rate

3. Nominal

Menu: Utilities – Choices – Finance – Nominal

OPAS can be used for transferring invoice information into hospital finance systems. For costing purposes within the finance software, a nominal code can be added to each detail line within the Invoice screen. To create a pop-up list in the nominal code field on the invoice, create the nominal codes here.

To add new nominal codes, click on the 'enter' icon (Edit, Enter).

Code	enter the nominal code
Description	enter a description for the nominal code

4.   Purchaser Codes

Menu: Utilities – Choices – Finance – Purchaser Codes

Details of the 141 Health Authority codes are held here.

If you need to add a new Health Authority code click on the 'enter' icon (Edit, Enter).

> *HA Code*   enter the Health Authority code

> *Name*   enter the name of the Health Authority

5.   Purchasing Card

Menu: Utilities – Choices – Finance – Purchasing Card

Enter the details of those suppliers that are involved in the purchasing card scheme.

To add a new supplier click on the 'enter' icon (Edit, Enter), and select the supplier from the pop-up list.

11.   Choices – GPs

1. GPs

Menu: Utilities – Choices – GPs – GPs

This is the standard list of over 30,000 UK GPs as supplied by the NHS and is updated when you receive upgrades to OPAS. If you add a new GP who is not on the list, or amend the details for an existing GP, be aware that when the list is updated, the changes you have made will be lost. However, any new GPs should now be on the updated list. Wynnlodge Limited is sent updates to the GP list on a quarterly basis. If you would like an update to your GP information between upgrades please contact the Helpdesk to request the latest GP CD.

To add a new GP click on the 'enter' icon [icon] (Edit, Enter)

Count   is automatically entered by the system and cannot be changed

Reference   is the GPs FHSA reference

Doctor   is the GP's name and must be entered as e.g. **WILSON A**, not **DR A WILSON**, so that the list can be put correctly into alphabetical order

GP Code   is normally entered as the FHSA reference (same as *Reference*)

2. PCTs

Menu: Utilities – Choices – GPs – PCTs

This holds details of the Primary Care Trusts.

Click on the 'GP' icon [icon] (GPs) to see the GPs in the Primary Care Trust that is currently on the screen.

Click on Practices to see the Practices in the Primary Care Trust that is on the screen.

3. Practices

Menu: Utilities – Choices – GPs – Practices

Click on the 'GP' icon [icon] (GPs) to see the GPs in the Practice that is currently on the screen.

4. Local

Menu: Utilities – Choices – GPs – Local

Utilities - Choices - GPs holds the national database of General Practitioners. When you are in the Patient screen, the pop-up list on the *GP* field shows this entire database for you to select from.

If you wish to narrow this list to GPs in your geographical area, then you can select your local PCTs here.

Add a new PCT to you local list by clicking on the 'enter' icon ▤ (Edit, Enter), and select the supplier from the pop-up list.

To activate your local list see the note below.

5. Rebuild

Menu: Utilities – Choices – GPs – Rebuild

Once your local PCTs have been identified, to make the GP's that belong to these PCTs be the only ones seen in the pop-up list in the Patient screen, select Local.

```
REBUILD GP DATABASE
-----
Do you want the NATIONAL or LOCAL GPs?

    National        Local
```
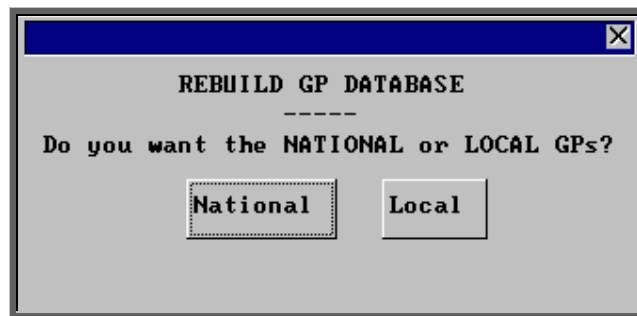
To return the pop-up back to the full list, select National.

Press Esc if you want to abandon the option.

12.   History

1. Descriptions

Menu: Utilities – Choices – History – Descriptions

The *Description* field appears on the order, prescription and waiting list screens. To create a pop-up list for the field, create your standard descriptions here.

To add a new description click on the 'enter' icon [icon] (Edit, Enter)

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

2.   Discounts

Menu: Utilities – Choices – History – Discounts

This is used to enter details of any supplier who give you a discount on any of their items.

Previously only one set discount per supplier could be applied. Now you can apply discounts within ranges of schedule numbers.

When adding a new discount click on the 'enter' icon [icon] (Edit, Enter).

Select the supplier name from the list offered.

You will then be taken to the *Discount* field. If the discount with the supplier is the same for all items, then enter the discount in this field. If, however, you have multiple discounts or only receive discounts on certain items then leave this field blank and press the Enter key to move into the *Bands* table.

Within the *Bands* table you can define the discount structure you receive.

e.g.
You get 5% discount on just readymade shoes ('A' schedule no's)
Enter A in the *From* field
Enter Az in the *To* field
Enter 0.05 in the *Disc* field

Bands		« ↔ »
From	To	Disc
A	Az	5.00%

Once you have entered the applicable discounts all related prices will be updated so that when orders are added the price that appears is the discounted price.

3.   E-mails

Menu: Utilities – Choices – History – E-mails

Within the system parameters (Utilities – Choices – System) you can specify that you want to switch on the function to e-mail orders (providing you have the necessary fax hardware/software on your PC).

To specify suppliers for e-mailing, click on the 'enter' icon (Edit, Enter).

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

Address: type in the e-mail address for the supplier.

4.   Fax

Menu: Utilities – Choices – History – Fax

Within the system parameters (Utilities – Choices – System) you can specify a fax printer driver which would mean that orders would be faxed directly from you computer to the supplier (providing you have the necessary fax hardware/software on your PC).

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

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

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

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

5.   Fitting

Menu: Utilities – Choices – History – Fitting

Fitting and Selling prices can be entered here for external purchasers, if required. However, if on an order, no fitting or selling prices are found for an item, they can be entered manually on the invoice.

To add fitting and selling prices for an item, click on the 'enter' icon (Edit, Enter).

To update existing fitting and selling prices, find the item you wish to change and click on the 'update' icon (Edit, Update).

Itemcode	is the item code (schedule number) as in the Prices list. Press **Tab** key for a list of items
Selling	is the price at which you will sell this item on
Fitting	is any additional fitting charge for this item (could be used without a selling price for a fitting charge on its own)
Description	is your description of the item that is being sold

6.   GRN Reasons

Menu: Utilities – Choices – History – GRN Reasons

When returning goods on an order, you are given the opportunity to enter a reason for the return. Instead of typing it, you can set up a pop-up list of reasons to choose from. You can still type in reasons manually, so by just creating your most common reasons for return will keep the pop-up small and manageable.

To add GRN reasons, click on the 'enter' icon (Edit, Enter).

7.   Items

Menu: Utilities – Choices – History – Items

This is the list of items supplied to patients and comprises both the OPRICE list and additional NSI and Stock items.

Do not update these records because any changes will be lost when the prices are rebuilt. New items should be added in Utilities – NSI – Items (see Utilities – Note 29. NSI).

If you would like to compare prices for a particular item:

find the relevant item and then click on the 'prices/suppliers' icon (Prices) to see details of the suppliers of that item and their prices.

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

To print the information click on the 'print' icon (File, Print) and select Custom Report. At the top of the screen select This_view. Highlight PLIST and click on Run. A print box will appear which defaults to 1 copy to the printer. If you require more than one copy simply change the number in the copies box. Click on OK to continue or Cancel to abort the print.

To return to the item screen, click on the 'exit' icon (File, Return).

8.   Manufacture

Menu: Utilities – Choices – History – Manufacture

This option is for hospitals that have on site workshops, where appliances are made or altered. This option is used for setting up the sections/departments within the workshop.

To add a department, click on the 'enter' icon (Edit, Enter), type the department name and press **Ctrl-Enter**

9.   Prices

Menu: Utilities – Choices – History – Prices

This is the list of prices for items supplied to patients and comprises both the OPRICE list and additional NSI and Stock prices. The screen can be used for comparing prices for a number of suppliers (see Using the Shopping Basket below).

It will also show the discounted price for that item if a discount has been applied in Utilities – Choices – Discounts (see Utilities – Note 12. Choices – History - Discounts)

Do not update these records because any changes will be lost when the prices are rebuilt. New prices should be added in Utilities – NSI – Prices (see Utilities – Note 29. NSI).

Using the Shopping Basket

Click on the 'printer' icon (File, Print), and choose Shopping Basket from the print menu.

> *Items*   select the first item you wish to find the price for from the pop-up list. Once selected, it will appear in the *Items* table.
>
> Continue to pick items from the pop-up list until all the items you want have been selected.
>
> Once all the items have been chosen, press **Esc** to make the pop-up list disappear and then press **Enter** to move into the *Suppliers* table
>
> *Suppliers*   select the first supplier you wish to find the price for from the pop-up list. Once selected, it will appear in the *Suppliers* table.
>
> Continue to pick suppliers from the pop-up list until all the suppliers you want have been selected.
>
> Once all the suppliers have been chosen, press **Esc** to make the pop-up list disappear and then press **Enter** to start the search.

Print 2 records

Screen   Printer   File

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

Screen

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

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

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

Printer

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

```
                    Shopping Basket of 2 items, printed 03/11/2003

Supplier 1: Halo Healthcare Ltd (2 items)              Supplier 2: Peacocks Medical Group Lt
Supplier 3: Remploy Healthcare (2 items)               Supplier 4: Jane Saunders & Manning L
Supplier 5: Blatchford Exolite Orthotic Services (2 items)


Item                                    Supplier 1  Supplier 2  Supplier 3  Supplier 4  Supplier 5

B11 - Addition of a cuff to increase the     21.90       12.51       15.64       18.90       27.46
upper height in a single

C11 - Restitching upper, per 25mm or part     1.67        1.68        2.72        2.16        2.56
thereof



                           Grand Total        23.57       14.19       18.36       21.06       30.02
```

File

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

10. Suppliers

Menu: Utilities – Choices – History – Suppliers

This is a full list of suppliers and comprises both the OPRICE list and additional NSI suppliers. This is for reference purposes only. New suppliers should be added in Utilities –NSI – Suppliers.

If you would like to see all the prices for a particular supplier:

find the relevant supplier and then click on the 'prices/suppliers' icon (Prices)

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

To print the information click on the 'print' icon (File, Print) and select Custom Report. At the top of the screen select This_view. Highlight PLIST and click on Run. A print box will appear which defaults to 1 copy to the printer. If you require more than one copy simply change the number in the copies box. Click on OK to continue of Cancel to abort the print.

To return to the item screen click on the 'exit' icon (File, Return).

11. Technicians

Menu: Utilities – Choices – History – Technicians

This option is for hospitals that have on site workshops, where appliances are made or altered.

To add a technician, click on the 'enter' icon (Edit, Enter).

Reference   is entered automatically by the system and cannot be changed

Technician: enter the technicians name

Department: select the department the technician works in from the pop-up list (Departments to appear in this pop-up are created in Utilities – Choices – Manufacture)

13.   Choices – Initiators

Menu: Utilities – Choices – Initiators

If you wish to create a pop-up list of initiators to use in the Care Episode screen, click

on the 'enter' icon [icon] (Edit, Enter).

Reference   is entered automatically by the system and cannot be changed

Initiator   enter an initiator

14.   Choices – Intervention

Menu: Utilities – Choices – Intervention

If you wish to create a pop-up list of intervention types to use in the Care Episode

screen, click on the 'enter' icon [icon] (Edit, Enter).

Type: enter the number for the intervention type

Description: enter the description for the intervention type

15.   Choices – Letters

Menu: Utilities – Choices –Letters

This is where all your letter templates are kept. There are different letter types for using
from different areas of OPAS. When you go into the letter screen all the types of letters
will be listed alphabetically by short name.

Ad hoc Letters   ADHOCA to ADHOCZ
                        26 standard letters used to create one off letters using the
                        Letters category in medical notes.

Collection Letters   COLLECTA to COLLECTZ
                            26 standard letters which can be sent to patients to inform
                            them that their items are ready for collection.

Condition Letters   CONDITA to CONDITZ
                            26 standard letters that can be sent to patients from the
                            medical conditions screen.   These are specifically for
                            targeting those patients with a particular medical condition.

DNA Letters   DNA_CONA to DNA_CONZ
                            26 standard letters to inform Referrers of patient DNA's (Did
                            not attends)

                            DNA_GPA to DNA_GPZ
                            26 standard letters to inform GPs of patient DNA's

                            DNA_PATA to DNA_PATZ
                            26 standard letters to patients that have DNA'd

Enquiry Letters   ENQUIRYA to ENQUIRYZ
                            26 standard letters that can be sent to private patients that are
                            making an initial enquiry regarding treatment

GP Letters   GPLETA to GPLETZ
                            You can create 26 standard letters to send to GPs

HSA5   Template for National Health Service Form HSA5 (Supply
                            of Drugs and Elastic Hosiery)

Appointment Letters   LETTERA to LETTERZ
                            26 standard letters that can be sent to patients to advise them
                            of their appointment.

Loan Letters   LOANREMA to LOANREMZ
                            26 standard letters that can be sent to remind patients to
                            return items on loan

Order Letters   ORDLETA to ORDLETZ
                            26 standard letters that can be sent to patients about their
                            order.

Patient Letters   PATLETA to PATLETZ
                            26 standard letters that can be sent to patients.

PCG Letters   PCGLETA to PCGLETZ
                            26 standard letters that can be sent to PCGs.

Practice Letters   PRACLETA to PRACLETZ
                          26 standard letters that can be sent to GP Practices.

Reminder Letters   REMINDA to REMINDZ
                          26 standard letters that can be sent to patients to remind them
                          about their appointment.

TRANS   Internal transport memo for booking patient transport for
                          appointments.

UNCOLL   Collection reminder letter.

Waiting List letters   WAITLSTA to WAITLSTZ
                          26 standard letters that can be sent to patients on the waiting
                          list

WF1   Template for National Health Service Form WF1 (Supply of
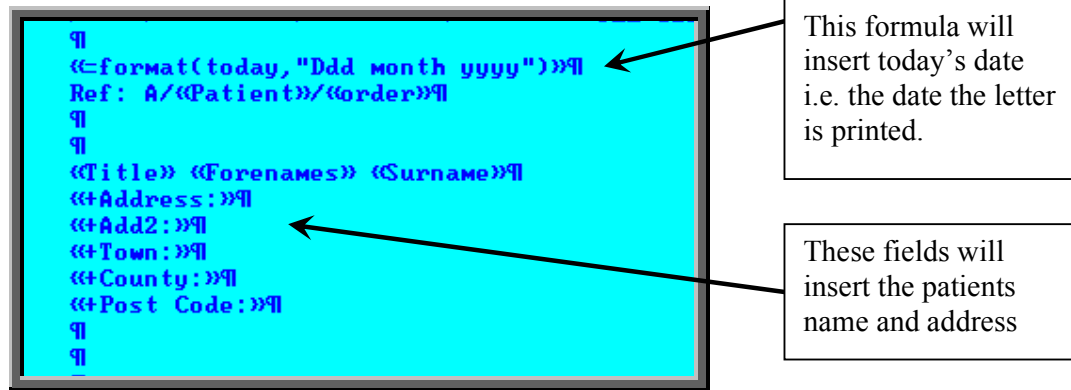   Wigs and Fabric Supports)

Editing Letters

Move the green highlight so that it is on the letter that you wish to edit. Once you

have highlighted the relevant letter click on the 'paper and pencil' icon [icon] (WP)

to see the letter. Then click on the 'four coloured squares' icon [icon]
(Wordprocessor) to be able to edit the letter.

You now have access to a full range of word processing facilities: however you will
probably only need basic typing in order to change the layout of the letter.

Move around the document with the cursor keys, **PgUp** and **PgDn**.

Some of the text of the letter is enclosed in chevrons: this is either a formula or a
field name that will be replaced by specific data from the patient, order or
appointment record.

This formula will insert today's date i.e. the date the letter is printed.

These fields will insert the patients name and address

Please do not alter any text within chevrons unless you are happy that you know what you are doing. To type the opening squiggly brackets press **Ctrl-J** (i.e. Ctrl and J keys together) and for the closing squiggly brackets press **Ctrl-K**.

Text you no longer want in the letter can be deleted. From the cursor position, **Backspace** deletes to the left and **Delete** deletes to the right.

Before you type text, it may be made bold by pressing **Ctrl-B**.

Bold is turned off by pressing **Ctrl-B** again.

Similarly, underscoring is turned on and off with **Ctrl-U**.

If you wish to select a different font for the text before you start typing, press **F6** three times and then select from any of the fonts installed on your PC. Once you have positioned the cursor at the font you wish to use press **F10** twice.

Changing the properties of existing text

Press the **Esc** key to bring up the word processing menu at the foot of the screen.

To make existing text **BOLD:**

>   Move your cursor to the start of the text you wish to make bold
>   click on Layout (type L)
>   click on Font (type F)
>   click on Bold (type B)
>   click on Insert (type I)
>   use the arrow keys to highlight the text you want to make bold and then
>   press **Enter**

To make existing text <u>Underscored</u>**:**

>   Move your cursor to the start of the text you wish to underscore
>   click on Layout (type L)
>   click on Font (type F)
>   click on Underscore (type U)
>   click on Insert (type I)
>   use the arrow keys to highlight the text you want to underscore and then
>   press **Enter**

To change the font of existing text:

>   Move your cursor to the start of the text you wish to change
>   click on Layout (type L)
>   click on Font (type F)
>   click on Change (type C)
>   use the arrow keys to highlight the text you want to change and then
>   press **Enter**
>
>   A list of fonts already used in the letter will appear. If the font you want
>   to use is in the list, move the cursor so that it is pointing at the required
>   font and press **Enter**. If you want to use a different font then press **F6**
>   twice, move the cursor so that it is pointing at the required font and press
>   **F10** twice.

While you are editing a letter, it can be printed to check the layout by clicking on the

'print' icon (<u>F</u>ile, <u>P</u>rint) and clicking on OK.

To come out of the letter once you have finished, click on the 'exit' icon (<u>F</u>ile,

<u>E</u>xit), and then click on the 'exit with a question mark' icon (<u>R</u>eturn).

You will be asked if you wish to save the current document. If you are happy with
the changes that you have made then choose Yes. If you want to leave the letter as it
was when you first opened it then choose No.

16.   Choices – Medical Conditions

Menu: Utilities – Choices – Medical Conditions

The conditions entered here will appear in a pop-up list when adding a note to a patient using the 'Note Category' of Dictionary. (see Patients – Note 15. Entering medical notes for more details of adding notes) and once these medical conditions have been assigned to a patient as a note the information can then be used for finding those patients with a particular condition.

To add a medical condition, click on the 'enter' icon (Edit, Enter), type the medical condition and press **Ctrl-Enter**

To find all the patients that have a particular medical condition assigned to them, move through the medical conditions using the 'arrow' icons and (**F6** and **F5**) to find the medical condition you wish to interrogate. Then click on the 'patients' icon (Patients) to see all those patients that have that medical condition. Now you can look at the information on the screen, print a list of those patients, or send a pre-designed letter to those patients.

Printing a list of patients

Click on the 'print' icon (File, Print) and select Custom Report from the drop down menu.

Click on the word This_view at the top of the screen to show those reports that can be run from this screen.

Highlight the appropriate report. i.e. CONLABEL for the patient address labels or CONLIST for the patient listing, and click on Run.

A print box will appear in the middle of the screen offering to send one copy to the printer. You can amend the number of copies required or select the information to be sent to the screen instead here. To proceed, click on OK.

Sending letters to those patients

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

Select Letter from the print menu

Highlight the CONDIT letter you wish to produce from the list provided

Select the number of copies required

Highlight Yes to continue and press Enter

17.   Choices – Mobility

1. Actions

Menu: Utilities – Choices – Mobility – Actions

To add actions that can be applied to wheelchairs, click on the 'enter' icon
(Edit, Enter).

2. Items

Menu: Utilities – Choices – Mobility – Items

To add wheelchairs types and accessories that are issued to patients, click on the

'enter' icon (Edit, Enter).

3. Locations

Menu: Utilities – Choices – Mobility – Locations

To add locations that wheelchairs can be held, click on the 'enter' icon (Edit,
Enter).

4.   Therapists

Menu: Utilities – Choices – Mobility – Therapists

To add therapist, click on the 'enter' icon (Edit, Enter).

Reference: is entered automatically by the system and cannot be changed

Therapist: enter the therapist name

18.   Choices – Note Categories

Menu: Utilities – Choices – Note Categories

When adding a note to a patient or a note against a care episode, there is a field called *Category*. This is to enable you to categorise the type of notes that you are adding.

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

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

Note: Categories of 'Dictionary', 'Video', 'Picture' and 'Temp' have already been set up for you. The purpose of these are explained in Patients – Note 15. Entering medical notes.

19.   Choices – Orthosis Codes

Menu: Utilities – Choices – Orthosis Codes

Orthosis Code is a financial costing analysis code for a group of similar items i.e. made to measure footwear Each hospital can use these codes as best suits them, usually in

conjunction with their financial department. They can be as simple or as detailed as you require, but bear in mind that every order that is added onto OPAS must have an orthosis code entered. If the coding structure is too complicated it may result in miscoding.

These codes must be set up before orders can be entered on to OPAS. It is worth spending some time thinking what your requirements are as they can have a direct effect on the management reports that are produced.

To add an orthosis code click on the 'enter' icon (Edit, Enter).

Orthosis Code	the orthosis code (up to 12 characters).
Description	is the description you want to give to that group of items represented by that code.
Delivery	is the normal delivery time for that group of items.
Group	you can group orthosis codes together. i.e. you may have an orthosis code for 'custom made shoes', one for 'stock shoes' and another for 'adaptions', but they all belong to a group called 'footwear'.
Classes	items and orthosis codes can be linked to a classification. *Classes* is working along the same principal as *Group* above, but takes it further by being able to link orthosis codes and items together (See Utilities – Note 3. Choices – Classes and Utilities – Note 4. Choices - Classify). The purpose for this is to show if an orthosis code is applied to an order incorrectly. E.g. If an orthosis code that is linked to class A is entered on an order where the item code is linked to class B, this will show as a mis-match by highlighting the orthosis code red on the order and invoice screen.

An orthosis code can be linked to several classes.

20.   Choices – Patients

1. Counties

Menu: **Utilities – Choices – Patients – Counties**

A list of counties can be set up as a pop-up list for the *County* field on the **Patient** screen.

Click on the 'enter' icon (Edit, Enter) and enter as many counties as is needed.

2. DOR

Menu: **Utilities – Choices – Patients – DOR**

The Districts of Residence (i.e. Health Authorities) of the patients have been included for you. When adding a new patient onto OPAS, if a valid postcode is entered in the patient's address, the relevant DOR will automatically be added to the patient record.

If you wish to update the description of the DOR's for your area, find the relevant DOR and click on the 'update' icon (Edit, Update). Move to the *Description* field.   Press **F8** to remove the contents of the field and type in the correct *Description*.

3. Ethnicity

Menu: **Utilities – Choices – Patients – Ethnicity**

If it is required to classify patients by their ethnic origins click on the 'enter' icon (Edit, Enter) and enter the codes and descriptions that will be used.

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

4. Exempt

Menu: Utilities – Choices – Patients – Exempt

A list of prescription exemptions can be set up as a pop-up list for the *Exempt* field on the Patient screen.

Click on the 'enter' icon [icon] (Edit, Enter) and enter as many exemptions as is needed.

5. Interface

Menu: Utilities – Choices – Patients – Interface

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

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

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

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

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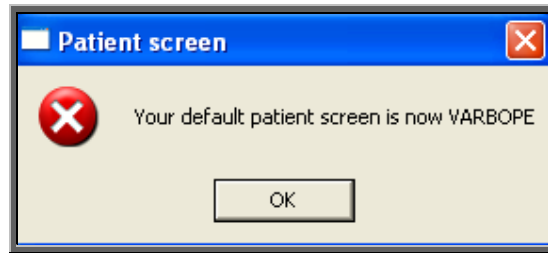
6. Services

Menu: **Utilities – Choices – Patients – Services**

Where OPAS is being used by more than one service, these can be created here and assigned to patient's records.

The *Service* field is on the **Patient**, **Venue**, **Waiting List** and **Contacts** screen.

To add a service, click on the 'enter' icon (Edit, Enter).

Service	enter the service code
Description	enter the service description
Elements	enter the elements that make up the service

7. Titles

Menu: **Utilities – Choices – Patients – Titles**

We have entered some standard titles applied to patients but you can enter more if you need to. Adding titles here will enable them to be selected from a pop-up list on the **Patient** screen, rather than being typed, thus ensuring no spelling mistakes.

Each title can have a sex allocated against it. e.g. Mr has M (for male) and Mrs has F (for female). This means that when you add a patient with the title Mr the Sex field on the patient record is automatically populated with M.

There are certain titles with can be either sex e.g. Doctor and the sex field has been left blank so that this can be entered manually when you enter the patient.

8. Towns

Menu: Utilities – Choices – Patients – Towns

A list of towns can be set up as a pop-up list for the *Town* field on the **Patient** screen.

Click on the 'enter' icon ▤ (Edit, Enter) and enter as many towns as is needed.

21.   Choices – Purchasers

Menu: Utilities – Choices – Purchasers

This section holds details of bodies that purchase goods and services.

Normally the purchaser will be the NHS Trust, but you might also want to create a purchaser for GP Fundholder, to cover any GP Fundholder purchasing goods or services. Alternatively, you could enter here each individual GP Fundholder as a separate record, although this may be over-kill as the GP can be held against the patient record and that would indicate which practice and PCT they belong. You could also create a record for private patients.

Note: If your trust covers more than one site, it would be advisable to enter each site as a different purchaser. This would enable you to obtain management reports that were site specific.

To add a purchaser click on the 'enter' icon ▤ (Edit, Enter).

Reference   is entered automatically by the system and cannot be changed.

Short name   the first few letters or initials of the purchaser, to enable quick selection of that purchaser.

Purchaser   is the full name of the purchaser.

Type   enter I if the purchaser is internal, or E if the purchaser is external.

Discount   is entered if you give that purchaser an across-the-board discount.

Sales VAT	is entered as **Y** or **N** to indicate whether VAT is applied on invoices to this purchaser.
Fitting	is entered as **Y** or **N** to indicate whether a fitting charge is normally added to invoices to this purchaser. Such charges will come from the Fitting screen (see Utilities – Note 12. Choices – History - Fitting).
Account Code	is entered if you are producing a file containing invoice information to send to your Finance Department. It is the account code for your department that is used by the Finance Departments software.
Card	is entered as **N** if the purchaser is not using purchasing cards (this is the default) or entered as **Y** if they are.
Print	enter **Y** if orders for this purchaser are to be instant printed.
	leave blank to batch print
	enter **N** to prevent orders printing in batch or instant print (if switched on).
Copies	If instant print of orders is switched on, extra copies (to those requested in the system parameter screen) can be printed for the purchaser.
Invoices	6 address lines, Phone and Fax are available for where invoices are to be sent for the purchaser.
Deliveries	6 address lines, Phone and Fax are available for where goods are to be delivered for the purchaser.

Note: The invoice and delivery details can be included on the printed order.

22.   Choices – Referrer Types

Menu: Utilities – Choices – Referrer Types

When referrers are set up, you have the option to state what type of referrer they are. We have set the following up for you.

C   Consultant
GP   General Practitioner
PD   Podiatrist
PY   Physiotherapist
OT   Occupational Therapist

If you want to add further referrer types click on the 'enter' icon (Edit, Enter)

> *Code*   enter an appropriate code
>
> *Description*   enter a description for the referral type

23.   Choices – Referrers

Menu: Utilities – Choices – Referrers

To add a new referrer click on the 'enter' icon (Edit, Enter)

> *Reference*   is entered automatically by the system and cannot be changed
>
> *Referrer*   must be entered with the surname last e.g. **Mr A Wilson** rather than **Wilson A**, in order that the names sort correctly into alphabetical order. If the Referrer has more than one initial, ensure there is a space between them e.g. **Mr A D Wilson**
>
> *Directorate*   enter the directorate the referrer works for from the pop-up list (Directorates to appear in the pop-up should be set up in Utilities – Choices – Directorates). If a Referrer works for more than one directorate, you may want to enter a new referrer record for each of the directorates so management reports show spend accurately.
>
> Note: If you choose to type the directorate in manually (rather than selecting one from the pop-up list) and it does not match a directorate in your list the following message will appear on the screen.

If the directorate you require is not in the list, the field can be left blank so that you can go into Utilities – Choices – Directorates and create the missing directorate.

Code   is often used for the Referrer's national number, or a local finance code: it must be unique. If you enter a code that you have already used, the error message 'Key value … for data-file … already exists' will show and you must change the code before you can save the record.

Speccode   is a financial code for that speciality (directorate), used for financial analysis. If you have assigned a speciality code against the directorate chosen above (in Utilities – Choices – Directorates) then the speciality code will appear automatically.

Type   enter the referrer type from the pop-up list (referrer types to appear in the pop-up should be set up in Utilities – Choices – Referrer Types).

Budget   if you know the referrers budget, it can be entered here.

Card   if the referrer has a purchasing card, enter the card details here. If you have assigned a purchasing card against the directorate chosen above (in Utilities – Choices – Directorates) then the card details will appear automatically.

Updating Referrer details

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

When you update referrer details you will be asked if you would like to update the patient records, which have that referrer assigned to them.
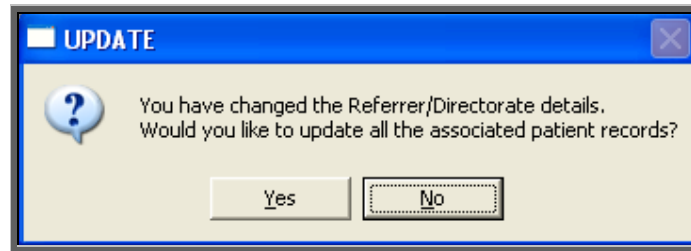
If you choose No, existing patients will continue to show the Referrer details as they were before they were edited.

If you choose Yes, the patient records will be updated and you will be informed when it is complete with the following message.
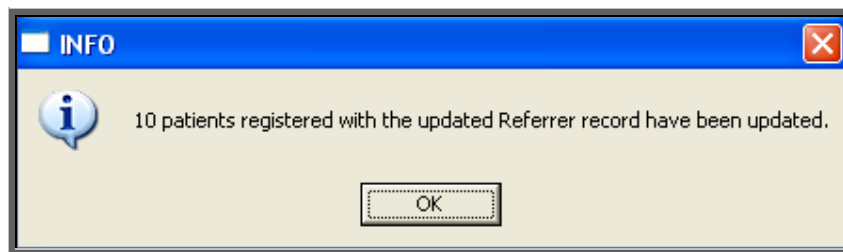
This task may take several minutes (depending how many patients you have) but will take less time if you are the only one logged into OPAS.

Note: If you have a new referrer to add, but he is replacing an existing referrer who has left, you may wish to update the referrer record for the referrer who has left with the name of the new referrer. This would enable you to update all the patients who had the old referrers name on their record with the new referrers name, providing you have answered Yes to the above prompt.

24.   Choices – System

Menu: Utilities – Choices – System

This screen holds system variables, which should not need changing once they have been

set up. This screen is very long and you may need to click on the 'page down' icon (**PgDn**) to see all the options.

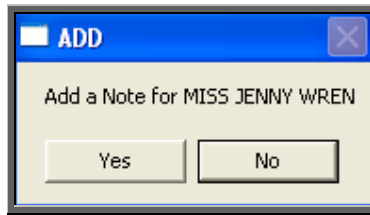|	
VAT Rate	will need to be changed if the VAT rate changes: it should not be changed in advance, only on the day that the rate actually changes
Hospital Name	would only be changed if the name of the Trust changed
Stock Supplier (1)	the supplier number for stock supplier 1 is 888
Stock Supplier (2)	the supplier number for the second stock location (usually 777)
Stock Supplier (3)	the supplier number for the third stock location (usually 666)
Stock Supplier (4)	the supplier number for the fourth stock location (usually 555)
Stock Supplier (5)	the supplier number for the fifth stock location (usually 444)
Last Home Purchaser	purchasers should be entered into the system with internal purchasers first. If there is more than one internal purchaser, this number is the number of the last internal purchaser: e.g. if there are 3 internal purchasers (entered first into the purchasers list) followed by 5 external purchasers (entered after the internal ones), then 3 would be entered here. Alternatively, when the purchasers are created, indicate on each one whether it is an internal or external purchaser.
Use Large Icons	is set to Yes to show large icons. If you prefer small icons, change this to No
Monitor messages	if this is set to Yes, you will be prompted when you have new messages (see Utilities – Note 28. Messages)
'Windows' messages	normally set to Yes to show messages in the normal Windows style
Default	this allows you to set what option appears as the default for Yes-No and OK-Cancel prompts.

ADD

Add a Note for MISS JENNY WREN

| Yes | No |

If you set this to No (this is the normal setting), Yes-No prompts default to No and OK-Cancel prompts default to Cancel. If you set this to Yes, Yes-No prompts default to Yes and OK-Cancel prompts default to OK.

Dormant time is the number of years without an order being placed after which a patient is declared as dormant and is moved to the dormant patients file using the dormant patients routine. Change this to the number of years that you wish to keep patients on the live system without an order being placed for that patient.

Auto-update DOR if this is set to Yes, whenever a patient is added or amended with a valid postcode in their address the *DOR* field on the patient record will be automatically populated.

Printing

General Printer is the printer used for letters and reports. To change this, set the required printer as the default in Windows, then in this screen move the cursor down to this line and press Tab

Order Printer is the printer used for orders. To change this, set the required printer as the default in Windows, then in this screen move the cursor down to this line and press Tab. If the same printer will be used to print orders as the General printer, leave this line blank (press F8 to blank the line if required)

FAX Printer is the device used to automatically fax orders. To change this, set the required device as the default in Windows, then in this screen move the cursor down to this line and press Tab. If faxed orders are not required, leave this line blank (press F8 to blank the line if required)

Instant Invoice if this is set to anything other than 0, an invoice will print immediately after having been entered onto the system if the purchaser on the invoice is external. Enter

the number of invoices that you wish to be printed instantly.

GRN   if this is set to anything other than 0, a goods return notification will print when goods are marked as returned on the orders. Enter the number of GRNs that you wish to be printed instantly.

Orders   if this is set to anything other than 0, the order will print instantly when it is raised. Enter the number of orders that you wish to be printed instantly. (If you have certain purchasers that do not require printed orders, their instant print can be switched off in the purchaser screen - see Utilities – Note 21. Choices – Purchasers).

Select Purchaser   if this is set to Y, a pop-up will give you the opportunity to select which purchasers orders are to printed when batch printing

Stock Orders   if this is set to anything other than 0, the stock order will print instantly when it is raised. Enter the number of orders that you wish to be printed instantly. (If you have certain purchasers that do not require printed orders, their instant print can be switched off in the purchaser screen - see Utilities – Note 21. Choices – Purchasers).

Instant Appt Letters   if you wish to instant print appointment letters, select Yes

Collection Letters   if you wish to instant print collection letters, select Yes

Transport Memos   if you wish to instant print transport memos, select Yes

Waiting List Letters   if you wish to instant print waiting list letters, select Yes

Max mail merges   to set the number of maximum letters that can be produced (excludes Appointment and Collection letters). This is to prevent, for example, a HSA5 form being produced for all your patients.

If you try and produce letters for more than your maximum, the following message will appear:
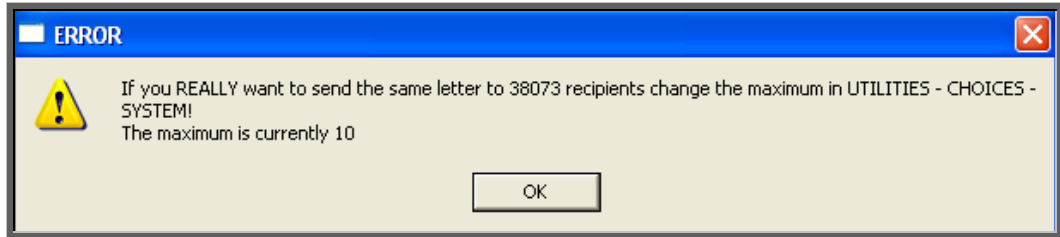
Paths

'Launch' with: Still:	type in the path of the executable file of the software on your PC that is used to display pictures/photographs. If you do not know this, your IT department should be able to help you.
'Launch' with: Video:	type in the path of the executable file of the software on your PC that is used to display video pictures. If you do not know this, your IT department should be able to help you.
'Launch' with: Scanned:	type in the path of the executable file of the software on your PC that is used to display scanned image. If you do not know this, your IT department should be able to help you.
'Launch' with: Documents:	type in the path of the executable file of the software on your PC that is used to display documents (e.g. MS Word). If you do not know this, your IT department should be able to help you.
PAS link path	enter the path to the PASlink, if installed
Case conversion	if using PASlink, the data can be converted into UPPER or Proper case
Upgrade path	the path to the files provided by Wynnlodge Ltd for upgrades to the OPAS System. This is normally left blank to indicate A: (the floppy drive).
Export path	this is used by those exporting information from OPAS into the main hospital system
Include fieldnames	this is used by those exporting information from OPAS into the main hospital system
RTT actions export	this is used to say when RTT information from OPAS into the main hospital system is exported

RTT path   this is used by those exporting RTT information from
                                    OPAS into the main hospital system

Appointments

Appointment time   is the default length of time in minutes for an
                                    appointment: it should show the most common length
                                    of appointments.

Clinic Usage   you can set how full a clinic can be booked with
                                    automatic appointments by reducing the percentage
                                    figure. However, making use of the facility by setting
                                    the usage to less than 99% will slow down the speed
                                    taken for OPAS to find the next available appointment
                                    for you.

Automatic Delay   enter the number of days delay in searching for
                                    appointments from the order and waiting list

Earliest/latest times   enter the earliest and latest times for the morning and
            the
with transport   afternoon that appointments that require transport can
                                    be offered.

Cancelled Appoints   once appointments are cancelled, this option decides
                                    whether they are kept on the system and identified by
                                    being highlighted in red, or removed (K for keep for R
                                    for remove).

No of Transport   enter the number of copies of transport memos required
Memos

Collections printed   when printing clinic lists, set collections to print or not
on Clinic Lists?   automatically, or to be asked each time if they are
                                    required

Demographics also?   when printing clinic lists, to set whether to be given
                                    option to print patient demographics

Remove from Waiting   select whether patients are removed from the waiting
List when Appoint is: list when appointments are Made or Attended.

Remove on DNA: when marking a waiting list appointment as DNA,
                                    select whether patient should be removed or not
                                    automatically or asked each time.

Maximum DNAs   this controls the generating of automatic letters for
                                    patients who DNA e.g. 1 in 6 months would result in a

letter being sent if the same patient DNA'd twice in a 6 month period.

Appointment Outcome: DNA: enter the reference for your DNA outcome. This is so OPAS will ask if you wish to make a new appointment when you record that a person Did Not Attend their appointment.

Appointment Outcome: CNA: enter the reference for your CNA outcome. This is so OPAS will ask if you wish to make a new appointment when you record that a person Could Not Attend their appointment.

Appointment Outcome: CBH: enter the reference for your CBH outcome. This is so that when an appointment is cancelled by the hospital the correct outcome is inserted

Max Appointments   enter the maximum number of appointments per session for New, Supply, Fit, Review and Cast appointments. Leave these blank for unlimited number of appointments.

Event for Fittings   select the event that will be entered on appointments made from the order

History

Update after Pass   if this is set to No, you will not be able to edit orders or invoices once the invoice has been passed to finance for payment.

Process invoices for received/supplied either *goods only*   if this is set to Yes, the invoice can not be amended for adding invoice details unless the goods have been received or supplied

Pass for payment   this controls the number of copies of the report that is produced when Pass for payment is run from the invoice screen. Enter 0 here to stop the report from printing.

Record delivery notes   if this is set to Yes, when goods are booked in on the patient and stock order, you will be prompted to enter the delivery note number.

Manufacture   to be set as None, Local or Remote. This field is used to indicate if orthotic items are manufactured by the Hospital. If they are not this should be set to None. If they are, you should set this to Local if the

manufacturing takes place on site, or Remote if at another location.

E-mail orders   if you wish to e-mail orders enter c:\daemon\ in this field.

Finance

Sage version   if you are exporting invoice details to Sage software, enter the version of Sage used
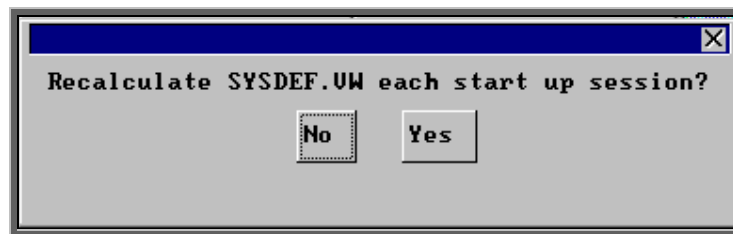
Purchaser Code (HA)   select your Health Authority. Press **Tab** to choose from the pop-up list

Centre Code (DSC)   select your Disablement Service Centre. Press **Tab** to choose from the pop-up list

Having made any changes, either press **Ctrl-Enter** to save the changes, or **Esc** then **N** to abandon the changes.

You are then asked:

```
┌──────────────────────────────────────────────┐
│                                          [X] │
├──────────────────────────────────────────────┤
│  Recalculate SYSDEF.UW each start up session? │
│                                                │
│         ┌──────┐     ┌──────┐                 │
│         │  No  │     │ Yes  │                 │
│         └──────┘     └──────┘                 │
└──────────────────────────────────────────────┘
```

and you **must** press **Enter**.

25.   Choices – Wards

Menu: Utilities – Choices – Wards

These appear in a pop-up menu on the Patient and Order screen, so that if the patient is an in-patient the ward they are in can be entered.

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

26.   Ex-patients

Menu: Utilities – Ex-patients

Over time the patient database will grow considerably in size. If you have patient records that are no longer required, they could be moved into Ex-patients. Their details can still be seen in Ex-patients along with their orders, notes and appointments, but they will no longer be in your active patient database (i.e. Patients option off the main menu).

Archiving patients

Menu: Utilities – Ex-patients – Archive

Selecting this option will move all you're active patients that have been deleted into the Ex-patients database. You may wish to run Dormant Patients prior to this, so all those patients that have not had an order or appointment for several years, are transferred too (see Patients – Note 28. Dormant patients)
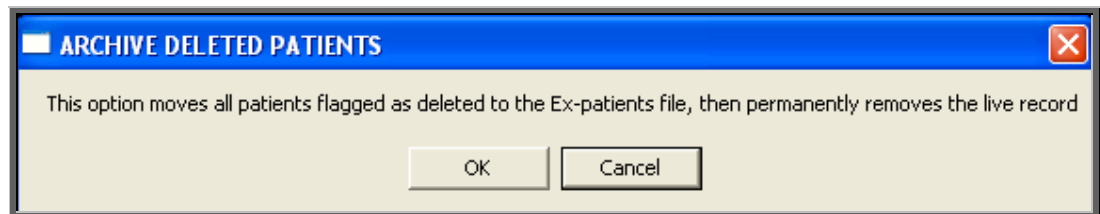
Note: Depending on the size of your patient database and the speed of your network, this may take quite a considerable time to run. You may wish to set this running overnight, but if you do, please ensure that the PC doing the archive will not get switched off accidentally. It is strongly advised that you take a back up before running this option and you <u>MUST</u> be the only person logged on to OPAS.

<u>Do not</u> interrupt while the archive is running. You will know when it has finished as the following message will appear.
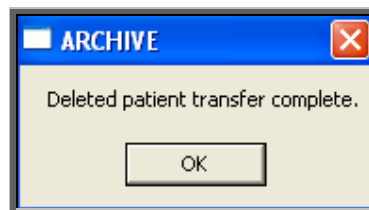
If there are no deleted patient records to be moved into Ex-patients you will get the following message instead.
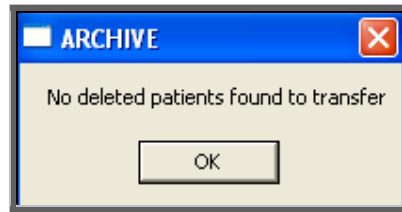
Looking at archived patients

Menu: Utilities – Ex-patients – Ex-patients

Selecting this option will show you those patients that have been archived.

There is not as much information shown on the initial Ex-patients screen as there is on the active Patient screen, but you can still access all that patients' orders, notes and appointments.

To look at their orders, click on the 'orders' icon (History).

To look at their notes, click on the 'notes' icon (Notes).

To look at their appointments, click on the 'appointments' icon (Appointments).

A patient can be moved back to the active Patient file by selecting Reinstate from the top of the Ex-patient screen
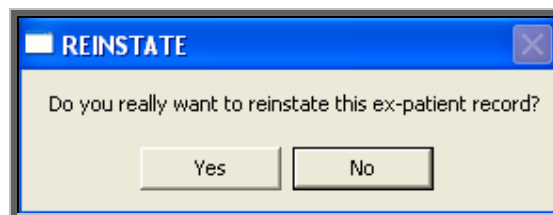
Click on Yes to continue, or No to abandon the transfer back to the active patient database.

If you select Yes and you are the only person logged onto OPAS, then the following prompt will appear when the transfer is complete.

If you select Yes and you are **not** the only person logged onto OPAS, then the following prompt will appear when the transfer is complete.

OPAS can copy the patient's details into the live area when there are others logged on, but it can not delete the file from the ex-patients area.

To remove the Ex-patient file, as soon as you are the only person using OPAS, go into Utilities – Ex-Patients – Ex-Patients and click on Data, Krunch.

You will be warned that this will permanently remove any ex-patient that is marked as deleted. Click on OK to continue and then select ex-pats from the list of files to purge.
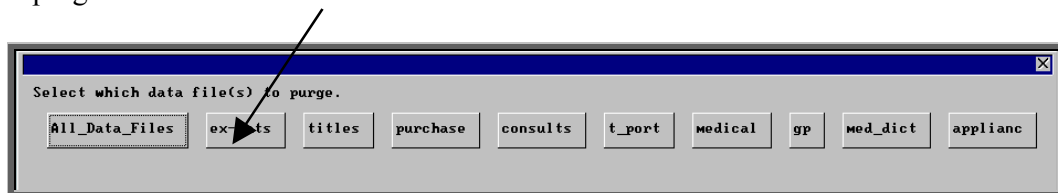
Looking at archived addresses

Menu: Utilities – Ex-patients – Addresses

When the address of a patient is changed, you are given the option to save the details of the previous address. This information is held against that patients record (see Patients – Note 4. Amending a patient's record), but is also held here. As all the old addresses are held together here, you have the ability to search for an old address by postcode.

27.   File Fix

There are occasions (particularly following a power failure) that we will ask you to run a File Fix. This will check the main database files to ensure that there are not any problems and if there are it will attempt to fix the relevant files. This option will take approximately 30 minutes to run. If you have a particularly slow network, it could take even longer.

Everybody that is using OPAS (except the user who is going to do the File Fix) must log out and not log back on before the File Fix has finished. It is strongly advised that you take a back up before running the File Fix, especially if it is a while since a backup was taken. (You should be taken backups daily! – see Introduction – Note 5. Backups)

Menu: Utilities – File Fix

OPAS will check that you have enough space on your local drive to perform the File Fix. The following message will appear, and you must ensure that there is enough space before continuing with the File Fix
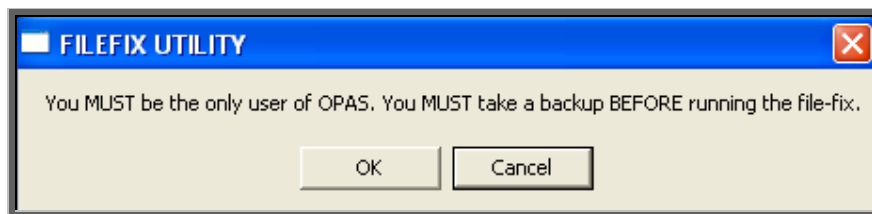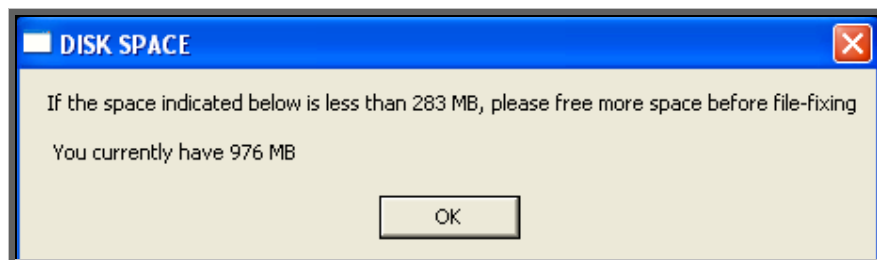
If you are not the only person logged onto OPAS or backup has not been taken recently select Cancel. Otherwise select OK to continue.

In the bottom left corner of the screen it will indicate which file it is checking.

If the information stops changing, do not worry that the File Fix is not working, it will just be checking one of the larger files. You will know when the File Fix has finished as the following message will appear in the middle of the screen.

If the above message appears, you can continue to use OPAS.

If any other message than the one above appears, e.g.
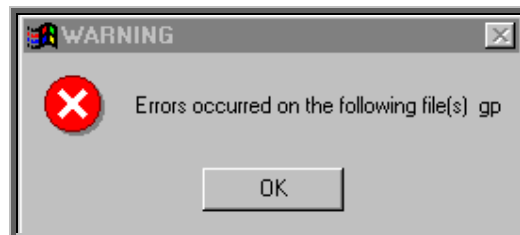
write down exactly what it says and contact the Support Helpdesk on 01904 492425. **DO NOT** use OPAS or let anyone else log on without speaking to someone on the Helpdesk.

28.   Messages

There is an internal messaging system within OPAS, so that messages can be sent to each other regarding patients and their orders and appointments. This is particularly useful for those using OPAS across more than one site, but it also useful for leaving messages for people that you do not see due to holidays or working hours.

a)   Switching messaging on

Menu: Utilities – Choices – System

Within messaging, you have an inbox and an outbox. These are effective immediately with no set up required. However, if you want OPAS to prompt you when a message is received, then the monitoring of messages needs to be switched on. To do this, go into Utilities – Choices – System and press the **Page-Down** key. *Monitor messages* should be set to Yes.

```
Monitor messages    Yes   No
Default             Yes   No
Auto-update DOR     Yes   No
```

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

Recalculate SYSDEF.UW each start up session?

No   Yes
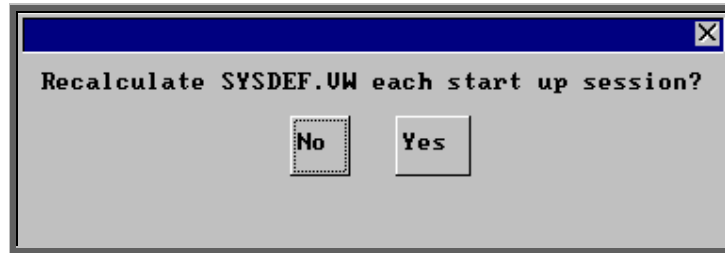
OPAS will check for new messages each time you return to a menu screen. When you have new messages the following prompt will appear.

MESSAGES

You have received new mail.

OK

To go to your in-box at any time select Utilities – Choices – Messages – Inbox.

b)   Sending messages from the outbox

Menu: Utilities – Messages – Outbox.

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

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: press the **Tab** key to access the pop-up list of patients. By inserting the patient's details here will enable the person reading your message to jump to the patient record.

Order: press the **Tab** key to access the pop-up list of orders. By inserting the patient's details here will enable the person reading your message to jump to the order.

Appointment: press the **Tab** key to access the pop-up list of appointments

Care Episode: press the **Tab** key to access the pop-up list of care episodes

Note: OPAS does not validate that the order, appointment or care episode belongs to the patient selected, so care should be taken if using these fields.
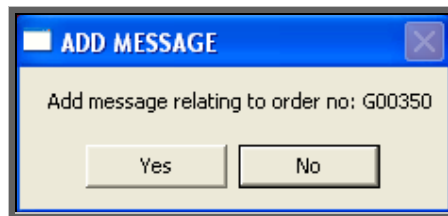
Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

c)   Sending messages from the Patients screen

Menu: Patients

Click on the 'messages' icon (Message).

Click on Yes (type **Y**) to continue.

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: press the **Tab** key to access the pop-up list of orders. By inserting the patient's details here will enable the person reading your message to jump to the order.

Appointment: press the **Tab** key to access the pop-up list of appointments

Care Episode: press the **Tab** key to access the pop-up list of care episodes

Note: OPAS does not validate that the order, appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

*Message:*   enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

d)   Sending messages from the Order screen

Menu: History – Orders

Click on the 'messages' icon [icon] (Message).

ADD MESSAGE

Add message relating to order no: G00350

| Yes | No |

Click on Yes (type **Y**) to continue.

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: order details will have been entered for you

Appointment: press the **Tab** key to access the pop-up list of appointments

Care Episode: press the **Tab** key to access the pop-up list of care episodes

Note: OPAS does not validate that the appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

e)   Sending messages from the Appointment screen

Menu: Appointments – Current – Appointments

(or any other method used to get to the Appointment screen)

Click on the 'messages' icon [icon] (Message).
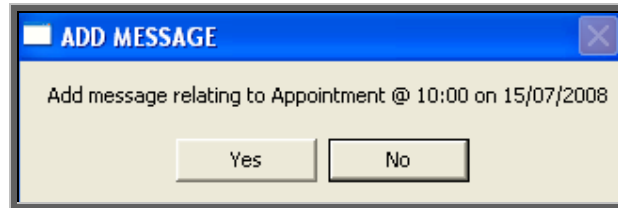
Click on Yes (type Y) to continue.

To: press the Tab key to access the pop-up list of user names

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: press the Tab key to access the pop-up list of orders

Appointment: appointment details will have been entered for you (this will appear
                   as a number and not a date/time)

*Care Episode:*   press the Tab key to access the pop-up list of care episodes

Note: OPAS does not validate that the appointment or care episode belongs to the
patient selected, so care should be taken if using these fields.

Message: enter your message here. There are nine lines available for your
                   message.

Having completed your message press Ctrl-Enter to send.

f)   Sending messages from the Care Episode screen

Menu: History – Care Episodes

(or any other method used to get to the Care Episode screen)

Click on the 'messages' icon (Message).

Click on Yes (type **Y**) to continue.

To: press the **Tab** key to access the pop-up list of user names

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: press the **Tab** key to access the pop-up list of orders

Appointment: *press* the **Tab** key to access the pop-up list of appointments

Care Episode: care episode details will have been entered for you

Note: OPAS does not validate that the appointment or care episode belongs to the patient selected, so care should be taken if using these fields.

Message: enter your message here. There are nine lines available for your message.

Having completed your message press **Ctrl-Enter** to send.

g)   Reading messages

Menu: Utilities − Messages − Inbox.

- If patient details have been completed, you can jump to the patient's record by clicking on the 'patient' icon (Goto, Patient).

- If order details have been completed, you can jump to the order by clicking on the 'order' icon (Goto, Order).

- If appointment details have been completed, you can jump to the appointment by clicking on the 'appointment' icon (Goto, Appointment).

- If care episode details have been completed, you can jump to the care episode by clicking on the 'care episode' icon (Goto, Care).

- If you wish to reply to the message, click on the 'enter' icon (Reply).

- If you wish to remove the message from your inbox, click on the 'delete' icon (Clear). This will also delete the message from the senders outbox.

29.   NSI (Non Scheduled Items)

It is within the NSI option that additional items, suppliers and prices that are not part of OPrice (contract pricing agreed by PASA/Scottish Healthcare) can be created.

Menu: Utilities – NSI – Items

By adding here additional items which you purchase, will save you time when adding orders, as they will then appear in the pop-up list available in the *Code* field of the order, and once selected the description of the item will automatically be inserted in the *Description* field in the Detail box.

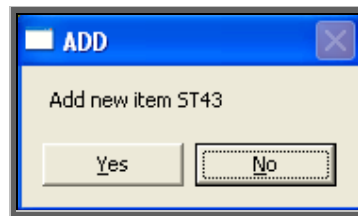To add a new item, click on the 'enter' icon (Edit, Enter).

At the bottom left corner of the screen you will be asked for the new item code.

Enter your code here and press **Enter**. If the code is already in use you will be told.

If the code is unique, you will be asked to confirm that you wish to continue.

Click on No to abandon this option. Otherwise click on Yes and enter a *Description* and the standard *VAT Rate* for the item.

At any time, you may come back and edit the *Description* and *VAT Rate* of the item, (but not the *Code*) by clicking on the 'update' icon (Edit, Update).

Menu: Utilities – NSI – Suppliers

Any suppliers that you use which are not identified in OPrice, need to be added here so that they will appear in the pop-up menu on the *Supplier* field in the Orders screen.

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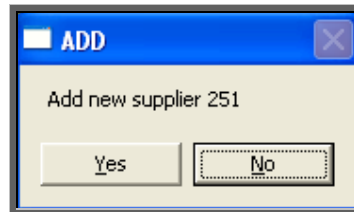

At the bottom left corner of the screen you will be asked for the new supplier code.

Enter your code here and press **Enter**. If the code is already in use you will be told.

```
333
This supplier code already exists
View: nsi_supp.vw    Window:1
```

If the code is unique, you will be asked to confirm that you wish to continue.

Click on No to abandon this option. Otherwise click on Yes and complete the following fields.

Name	enter the full company name of the supplier
Shortname	enter an abbreviated name for the supplier (you will be able to search for suppliers in the pop-up list by this Shortname)
Currency:	*select the currency of the supplier from the pop-up list*
Add1 – Add4	there are 4 lines available for entering the supplier address
Postcode	enter the supplier's postcode
Phone	enter the supplier's phone number
Fax	enter the supplier's facsimile number
Contact	if you have a contact name for the supplier, this can be entered here
Vendor No.	if you know your account number with the supplier, it can be entered here

All the fields are optional, but if you want the suppliers address to appear correctly on your orders, you need to ensure that at least those fields in red are completed.

At any time, you may come back and edit all the fields (except *Code*) by clicking on the 'update' icon (Edit, Update).

Menu: Utilities – NSI – Prices

By adding additional prices that are not included in OPrice, will save you time when adding orders, as the Price will automatically be inserted in the *Price* field in the Detail box.

Before adding a price, the item and the supplier need to be known to the system. If either/both are not set up on OPAS already, then follow the steps above on how to add a new item and supplier.

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

Supplier   select the supplier from the pop-up list

Item   select the item from the pop-up list.

                  If you select an item that there is already a price for from the supplier selected, you will get the following message at the bottom of the screen.

Price already exists .. please re-enter supplier or item or abandon

View: nsi.vw   Window:1

                  If the supplier and item selected is correct then you will need to abandon the adding of a new price by pressing **Esc** a price already exists.

Price   enter the price for the selected item from the supplier selected

Search   the *Search* field will automatically be populated

VAT Rate   enter the default VAT rate for the item

                  S   standard
                  E   exempt
                  Z   zero-rated
                  R   reclaim

                  At any time, you may come back and edit all the fields (except *Search*) by clicking

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

30.   OPrice

OPrice contains the pricing information that has been contracted by Purchasing and Supplies Agency (PASA). This is updated on an annual basis. When new prices are agreed with PASA they kindly pass the details on to us so that we can convert them into a format that can be read into OPAS so that you have access to them when raising orders. As this is their data, you do not have the ability to edit this information. Having said that, there is the option to edit a suppliers details as they could move address within the contract year. If you need to add additional items, prices or suppliers, this should be done in the NSI (Non Scheduled Item) area (see Utilties – Note 46. NSI).

Menu: Utilities – OPrice – Current

|	
Items	Shows all the items and their descriptions for the current contract year as defined by PASA/Scottish Healthcare. This is for information only, and cannot be amended.
Prices	Shows all the prices agreed for the current contract year by PASA/Scottish Healthcare. This is for information only, and cannot be amended.
Suppliers	Shows all the suppliers for the current contract year as defined by PASA/Scottish Healthcare. As supplier details may change within the year of the contract, you do have the ability to amend the details by clicking on the 'update' icon (Edit, Update).

Menu: Utilities – OPrice – Previous

Items	Shows all the items and their descriptions for the previous contract year as defined by PASA/Scottish Healthcare. This is for information only, and cannot be amended.
Prices	Shows all the prices agreed for the previous contract year by PASA/Scottish Healthcare. This is for information only, and cannot be amended.
Suppliers	Shows all the suppliers for the previous contract year as defined by PASA/Scottish Healthcare.

Menu: Utilities – OPrice – Rebuild

This option will rebuild your live prices file with the combined information held in OPrice, NSI and Stock Control. This option needs to be run whenever prices are being updated by a upgrade disk sent to you by Wynnlodge Limited e.g. the new PASA price disk sent in March/April. Full instructions will be sent with any upgrade disk, but it advisable to take a back up before running this option.

You will be informed when the rebuild is complete. Depending on the speed of your PCs/network this can take up to half an hour.
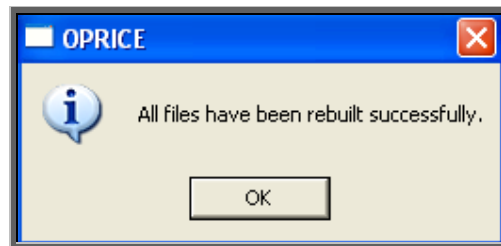
31.   Order numbers

1. Standard Formula

Menu: Utilities – Order Numbers – Standard Formula

Note: This menu option is only available to those logins that have administrator rights.

This is where the format for the automatic order numbering is set. The formula is explained below:

```
┌─ Text-File ══════════════════════════════════════════════
│group("G EXT PCG",$search)!right(str([count]+100000),5)
│tmp
│
│This text-file contains the standard formula that is used to calculate new
│order numbers. Extreme care should be taken when editting this formula.
│
│Example:
│
│  "G"!right(str([count]+100000),5)
│
│would result in a series of order numbers:
│
│  G00001
│  G00002
│  G00003
│  etc
│
│Call the support desk if in any doubt.
│
│The second line of this file is used for the temporary patient number prefix
│
│
│
```

Where a hospital number is not known, a patient can be allocated a temporary number by typing ⍰ at the patient entry screen. A sequential number is allocated by the system, prefixed by the text shown on the second line of the file above e.g. tmp.

Do not make any changes unless you are confident about what you are doing!

2.   Portable Formula

Menu: Utilities – Order Numbers – Portable Formula

Note: This menu option is only available to those logging onto a portable licence.

This is where the format for the automatic order numbering is set. So that order numbers are not duplicated, the portable system needs to allocate order numbers with a different prefix to the main system. Therefore each portable licence needs to have its own unique numbering system and a different formula created on each laptop. The formula is explained below:

```
= Text-File =
"P"!right(str([count]+100000),5)
TEMP

This text-file contains the standard formula that is used to calculate new
order numbers. Extreme care should be taken when editing this formula.

Example:

  "G"!right(str([count]+100000),5)

would result in a series of order numbers:

  G00001
  G00002
  G00003
  etc

Call the support desk if in any doubt.

The second line of this file is used for the temporary patient number prefix
```

Where a hospital number is not known, a patient can be allocated a temporary number by typing ? at the patient entry screen. A sequential number is allocated by the system, prefixed by the text shown on the second line of the file above e.g. TEMP.

Do not make any changes unless you are confident about what you are doing!

32.   PAS Link

Menu: Utilities – PAS Link

If the hospital has bought some additional software from Wynnlodge Limited called PAS Link, this option can be used for downloading patient information from the main hospital database. As hospital databases vary, the instructions for using PAS Link are site specific and individual instructions will be provided to those hospitals using this.

If you have PAS Link, the option can be run from here, or by clicking on the 'PAS Link'
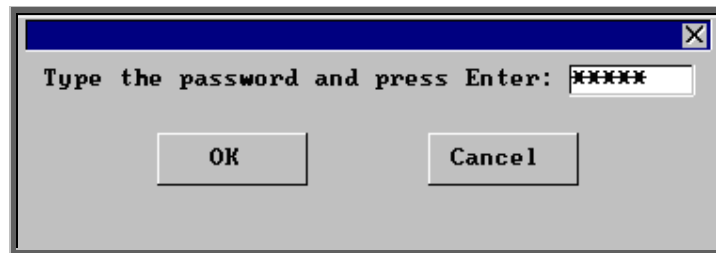
icon (Paslink) in the Patient screen.

33.   Password

1. Standard

Menu: Utilities – Password – Standard

Use this screen to change your log in password.

On selecting this option, you will first be asked to type in your current password.

You will then be asked to type in your new password.

You will then be asked to type in your new password again to check that you typed it correctly the first time.

If you type the new password the second time exactly the same as the first time, your password will be changed.

If, however, you type the new password in differently the second time you will get the following error message.

Click on OK to remove the message and then press the up arrow key on your keyboard to place your cursor back in the box where you need to type in the new password again. You are given three attempts to re-type the new password before being taken back to the menu, where you can start again from scratch.

2.   Verification

Menu: Utilities – Password – Verification

Use this screen to change your verification password (used for verifying notes).
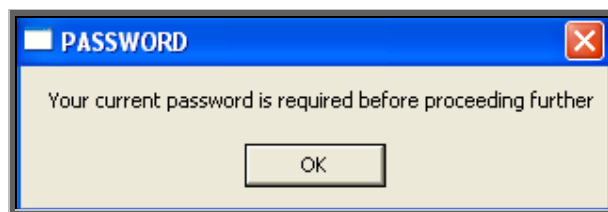
If you do not have a verification password (or if you have forgotten it and the OPAS administrator has reset it) type in your log-in password.

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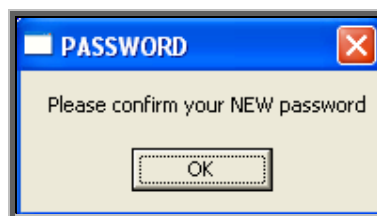
You will be asked to type your new verification password again, before confirming that your password has been stored.

Resetting a verification password

No one has the ability to look up a verification password (not even Linda or Martin at Wynnlodge). If somebody forgets their verification password, then a user with administrator access has to reset it so they can go through the steps above again. To reset verification passwords go into Utilities –

Users. Once you are looking at the relevant user record, click on the

'cancel verification' icon ![icon] (File, Clean_Up, Verification).
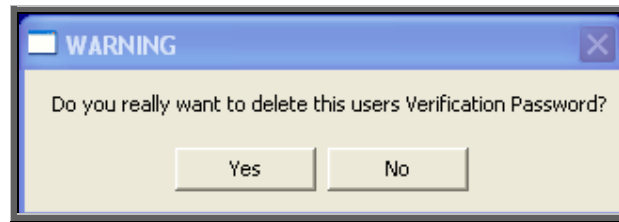
Click on Yes to continue.

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

34.   Portable

If you have an OPAS portable licence for use at remote clinics, these options are used for transferring data between the main system and the laptop computer.

When you are working on an OPAS portable licence, the work that is carried out is stored in the appropriate section here so that when the laptop is next connected to the main system it knows what information needs to be transferred. Once the information is transferred onto the main system, these temporary files are cleared down, ready for the next time the portable is used.

Menu: Utilities – Portable – Exchange – Upload

This option will transfer the information from the main system onto the laptop, so that the latest information is available when working at a remote site.

Menu: Utilities – Portable – Exchange – Download

This option will transfer the work done on the laptop (held in the temporary files) onto the main system.

35.   Training

1. Copy

Menu: Utilities – Training – Copy

This option will transfer the data held in your live system into the training database. This makes the training area look more 'life like' and provides plenty of data to practice with.

On selecting this option you will be asked to confirm whether you wish to continue.
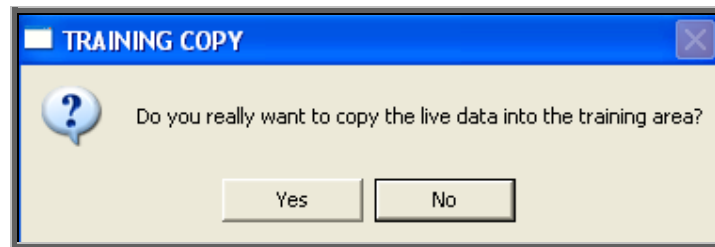
Click in Yes to continue, or No to abandon the option.

It will take a few minutes to copy the data, and you will know when it has finished as the following message will appear.
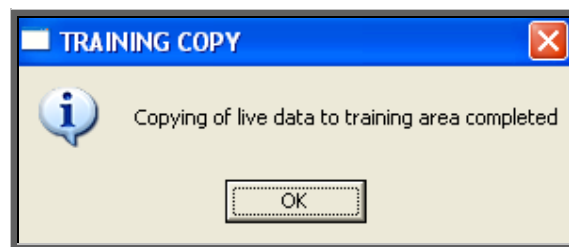
To log onto the training database, click on the OPAS icon as usual, but instead of logging on as yourself, log on with the User ID of Trainee. You will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.
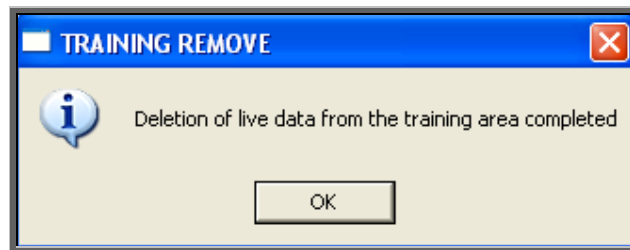
2. Remove

Menu: Utilities – Training – Remove

Selecting this option will remove the training database. You may want to do this if you no longer use the training database and want to free some space on your computer
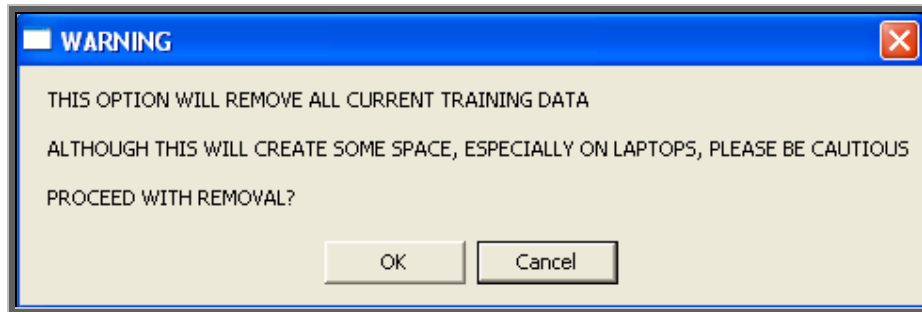
If you are in any doubt, please contact the OPAS Helpdesk before proceeding.

You will be notified once the training database has been deleted.

Note: If the Training database is removed and is then required again (e.g. for a new member of staff), select Utilities – Training – Copy to reinstate it.


36.   Upgrade

Menu: Utilities – Upgrade

This option should only be used if you have received an upgrade disk from Wynnlodge Limited. **DO NOT** use this option with disks received from anybody else.

We periodically send you upgrade disks to update
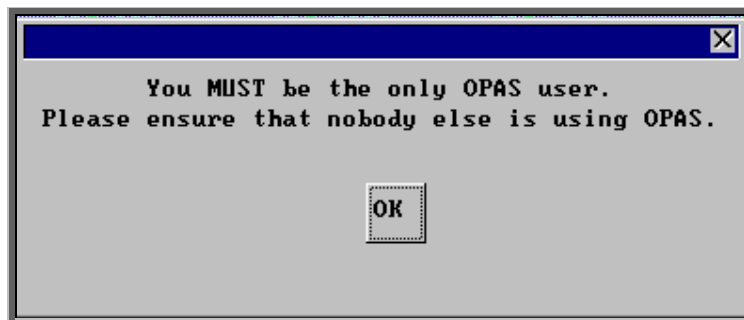
- prices

- report layouts

- letter layouts

When you receive an upgrade disk to update reports or letters, make sure you are the only person logged onto OPAS before selecting this option (if you are not sure, click on **Utilities – Who** to find out who is logged on).
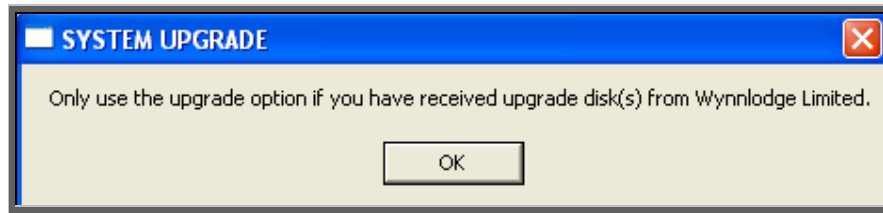
Click on OK
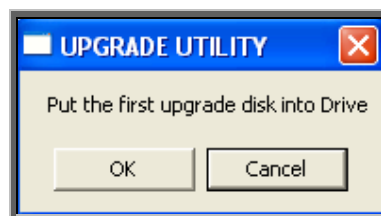
Put the disk into you PC, and click on OK

Make sure you are still the only person using OPAS and click on OK

A black MS-DOS prompt box will appear briefly on the screen. When this black box has disappeared the transfer is complete.

The disk can now be taken out of the PC. The disk is no longer required, but should be kept until confirmation that the changes required have been made.

37.   Users

Everybody that needs to access OPAS should be set up as a user. As OPAS maintains an audit trail showing which user has done what, it is prudent to make sure that each person has his or her own log on, and is not logging on as somebody else. If you are in any doubt as to who the OPAS session is logged in as, look at the very top of the screen where an information banner is displayed.

**Orthotic Patient Administration System - Logged in as LINDA at 21:55 on 02/11/2003**

When OPAS is first installed, we will set up those users who will initially need to use OPAS. However, as new members of staff are taken on, they will be required to be set up here.

Menu: **Utilities – Users**

To add a new user, click on <u>E</u>dit and then select <u>E</u>nter.

User ID	enter the forename of the user e.g. Janet. There must be no spaces in the user name and it must be unique. Therefore if you have two Janets using OPAS one will have to be set up as their forename and initial of their surname e.g. Janetp or perhaps an abbreviation of their name e.g. Jan
Password	the password will be entered for you. It will be the same as the user id and in CAPITALS
User Name	enter the full name of the user e.g. Janet Air.
Default appointment letter	enter the standard appointment letter used – this is usually A.
Print	this field is used when OPAS is being used in more than one location. You can enter the appointment/collection letters used by that user so that when they use the Auto-print function for printing appointment/collection letters, **only** their letter types will be printed.
Assigned User Mode	enter USER if the new user is to only have access to the screens used for day-to-day clerical procedures. enter ADMIN if the new user is to have access to all areas of OPAS, including those screens controlling the system set-up and maintenance functions.
Information Set	press the **Tab** key and select standard from the pop-up list.

Language	leave this field blank
Autohelp	select Yes
Application Help	select Read_only
Technical Reference	select Read_only
Procedures	select Read_only
Definitions	select Read_only if they have been set up as USER above. select Author if they have been set up as ADMIN above.
Administrator	select No
Language Maintenance	select No
Personal Directory	when reports are run in OPAS and the results are saved to file, they will be automatically saved in the default directory entered here. Therefore this line should read Q:\OPAS\(user name) e.g. Q:\OPAS\JANET. Press **Enter**.

Do you want to create Dir < Q:\OPAS\JANET >?

Yes   No
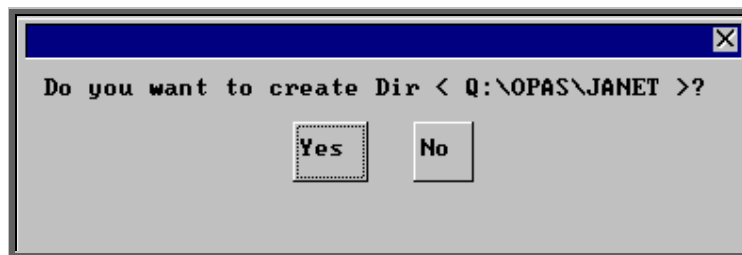
You will be asked if you want to create the new directory and you should click on Yes (type Y).

All of the fields (except the password) can be changed later by clicking on Edit and selecting Update.

Resetting passwords

If someone forgets their password, then their password can be reset (back to their user name) by finding their user account in and selecting File, Clean_Up, Password from the top of the screen.
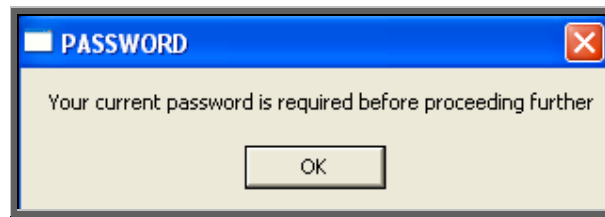
You will then be asked to enter your own password, to confirm that you are the administrator.

Choosing screen colours

Once a user id has been created, they have the ability to choose the colour of their screen. The colour scheme chosen, however, will take effect on all key screens i.e. patient, order, invoice, stock, appointment screens. The colour scheme selected will only affect the user it is applied to, so in theory you can all have different colours.

Note: If you do change your screen, please remember that when ringing the support desk it is no help to tell us the colour of the screen you are in as this will no longer be relevant!

To change screen colours firstly find the user that wishes to change their screen

colours, by moving through the records with the 'right arrow' icon (F6 key).

Click on the 'update' icon (Edit, Update) and move down to the *Data BG:* field at the bottom of the screen.
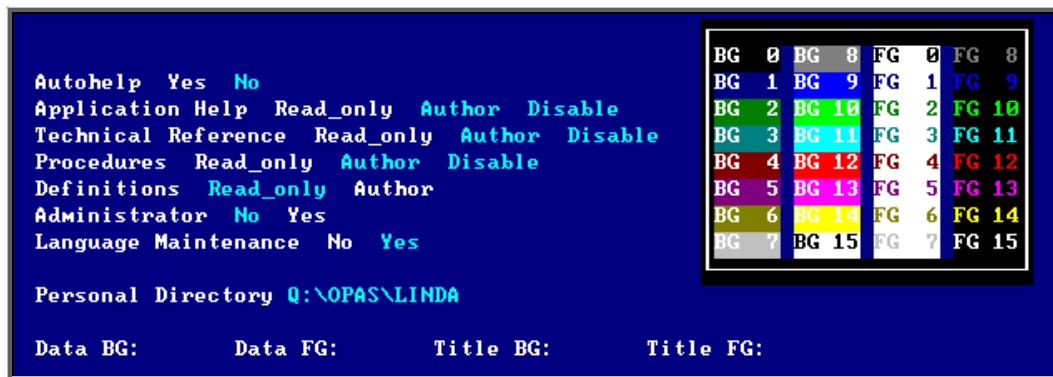
Using the colour chart on the screen you need to select the background (BG) and foreground (FG) colour of the data and titles. For example, if you want the background of the data to be dark blue enter '1' in the *Data BG:* field, if you want it to be bright pink (for any wannabe Barbies out there) enter '13'. Below are some examples which may explain this better.

Example 1

will give you

Example 2

will give you

Example 3

will give you

At any time you can revert back to OPAS standard colours by leaving the four colour fields blank.

38.   Version

Menu: **Utilities – Version**

Filecheck   will check your OPAS files. This option should only be run if asked to by a member of the OPAS Helpdesk

SmartWare   Occasionally we are asked to check how many licences for OPAS your computer has. We can do this by asking you to look in Windows Explorer.   As not all our users are familiar with Windows Explorer, we have provided a menu option that will give you that information.
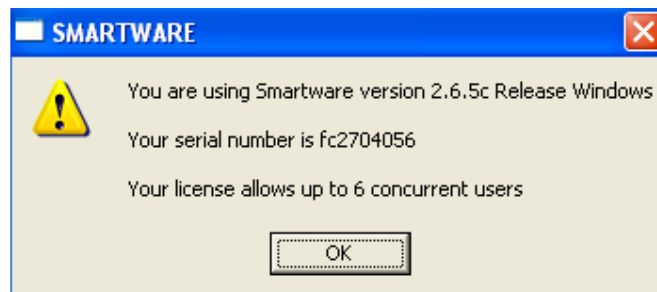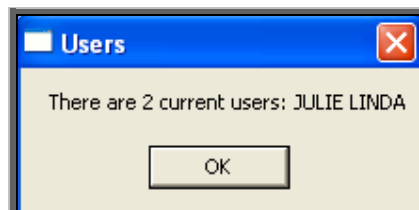

Version Number   will show you which version of OPAS you are using and when it was installed. It will also give a brief summary of the changes made in that version.

39.   Who

Menu: **Utilities – Who**

On selecting this option you will be shown who is currently logged on to OPAS.

This option is useful when you need to be the only person logged in to perform a task e.g. archiving appointments and you want to know who is currently using OPAS.