OPAS

Orthotic Patient Administration System

Getting Started

Version 6

OPAS – Getting Started

This manual is intended to help you learn the system during the first exciting weeks of familiarisation with OPAS. It does not explain all the menu options that you will see as you move around OPAS; just those that you need to know about initially to get started. On your first training session you will receive a full manual that will explain every aspect of OPAS, but we have found that too much information in the very early stages can prove to be counter productive.

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Introduction

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Introduction

1.   The Manual

This manual is intended for two purposes: to help you learn the system during the first exciting weeks of familiarisation with OPAS and to act as a reference guide to answer specific questions.

You should read the first part of the manual, *Moving around OPAS*, before diving into the rest of the manual.

The next part then gives detail on the facilities within OPAS roughly in the order in which you are likely to use them. It can be used as a training manual by working through it sequentially. You should, however, be receiving adequate training, and the manual is designed to be a reminder on how to do those tasks not performed regularly or as a refresher guide after training. Note that some menu items do not show for all users: some only show if you log in as an administrator. If you need to access a screen that does not show for your login, refer to your administrator within the Orthotics Department.

Finally, a comprehensive index is then provided, referring you to the main part of the manual: this will serve as the first port of call for questions and problems.

2.   Conventions

- **Options to be selected from the main menu are shown like this.**

- Options to be selected from the top of the screens or in pop up boxes are shown like this.

- *Field names are shown like this*.

- Keys, which are to be pressed, are shown like this: `Enter`
  Thus you would press the `Enter` key, not type the word Enter.

- Key-presses shown like this: `Ctrl-Enter` indicate that the first key is held down, then the second key is pressed briefly, then the first key is released.

- clicking with the mouse is always the left mouse button unless otherwise stated.

3.   Training

An installation & familiarisation session, followed by at least two training days, is included in the price of the purchased system.

The training sessions can be taken at any time. When you feel ready for more training, please phone Linda Pawson on 01904 492425 to arrange a convenient date.

The training sessions assume that you are familiar with the computer keyboard and the mouse: they are not intended to be Windows training sessions. If necessary, it may be appropriate for your staff to take a standard Windows training course before being trained specifically on OPAS. If you prefer, we will be happy to give standard Windows training to your staff before starting the OPAS training (and if your staff prove to be unfamiliar with standard Windows concepts and operation, this will be essential), but there will be a charge as this is not included.

The familiarisation session will look at adding new patients and orders into OPAS. In the first training session, we will check the reference data and ensure that you know where it is and what it is used for, and then recap on entering & updating patients and orders.

We will then cover the following topics as required. The order in which they are covered will depend on your particular requirements.

- **Appointments**

    Setting up clinic details
    Creating clinic dates
    Making and updating appointments

- **Stock Control**

    Setting up stock items
    Ordering stock
    Maintaining stock levels

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

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

- **Reports**

    Looking at the different ways in which OPAS can produce written reports

If after the two training sessions you are still unsure and need further training, please contact Wynnlodge to discuss further training requirements. We recommend training to be taken in half-day sessions, since more is often too much to take on board in one day.

4.   Support hotline   01904 492425

If you have a problem which cannot be solved by this manual, please phone us for help on 01904 492425. Please start by giving your name and the **hospital** you are calling from.

You must be at the keyboard when you phone, since we will probably ask you to type things and tell us what happens.

Please note that we are happy to provide support for the OPAS software, but not for your hardware or other software, e.g. network or backup problems. If the problem is related to a hardware fault or a network problem, then since we are responsible only for the OPAS software, we will refer you to your technical support personnel.

To save time, before you phone us, please try the following:

- messages and prompts appear throughout the system and if you are unsure at any point, firstly look at the bottom left corner of the screen to see if a message or prompt is visible that will help you. Please make a note of any error messages, and what you were doing when the errors occurred. This is vital information if the support desk is to understand the problem.

- look in this manual in the relevant section to check that you have followed the correct routine

- quit out of OPAS back to the operating system (e.g. the Windows desktop), then run OPAS again and see if the problem has disappeared

- quit out of OPAS back to the operating system (e.g. the Windows desktop), shut down the computer, wait for one minute, switch the computer on again, run OPAS again and see if the problem has disappeared.

5.   Backups

It is essential that you take adequate backups; we recommend that you take daily full backups of OPAS. We cannot be responsible for your data. If a problem occurs, however caused, we may ask that you restore your most recent backup. Remember that if a computer, network or power problem occurs and your OPAS data is damaged, you have potentially lost all work done since the last backup, and will have to re-do that work, after restoring from the backup.

If your technical support personnel are in any doubt as to what should be backed up, they should contact the Support hotline.

It remains your responsibility to ensure that these backups are taken and that you are familiar with both the backup and the restore routines in use.

6.   Contact summary

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       Wish list items for future versions
       Purchase of further licences
       Renewal of annual support

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

7.   Copyright

The Orthotic Patient Administration System, including this manual, is copyright ©
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Moving around OPAS

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6.   Standard menu options

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Moving around OPAS

1.   Logging on

The method of running OPAS will depend on the operating system used by your PC. If your PC is running Windows 95, 98 or NT, selecting the OPAS icon from the Windows Desktop runs OPAS.

When you double click on the OPAS icon you will be asked for your User ID. During the 'Familiarisation session' each person who needs to use the system will have been set up as a user. User names must be unique and unless you have asked otherwise we will have set them up to be your forename. (New members of staff will need to be set up in Utilities – Users. See Utilities – Note 29. Users)

Type in your user id and press **Enter**

You are then asked for your password. **This must be entered in the correct case i.e. if your password has been set up in capital letters then you must type your password in upper case. When we set your initial password, it will be in capital letters.**

Type in your password and press **Enter**

If you get the error Invalid Password then you have either typed the wrong password or you have typed it in the wrong case. You will get three attempts to get your password correct. If the password is typed in incorrectly three times you will be taken out of the log on screen and you will have to double click on the OPAS icon to start again.

Your User ID determines what parts of the system you can use: if you forget either your User ID or your password, or you find you need to access parts of the system which are only available to the administrator, please ask your system administrator.

It is a good idea to keep your password a secret. It is a **bad** idea to write it down, so try to make it easy to remember, without being too easy to guess!

Your password can be changed at any time by selecting Utilities – Password.

Training Area

By logging on with the User ID of Trainee you will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.

The ways in which you can use the keyboard and the mouse to select the different menu options are covered below. You should become familiar with this section before proceeding, so that you are confident with using the keyboard and the mouse or whatever combination suits you best.

2.   Box menus

An item on a box menu such as the main menu can be selected by:

double-clicking with the left mouse button on the item required (move the tip of the cursor arrow onto the item, then click twice in quick succession with the left mouse button)

pressing the first letter of that item on the keyboard:

if that letter is unique (i.e. no other item on that menu begins with the same letter), the item is selected immediately

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

using the cursor keys (arrow keys), move the selection box to the required item, then press **Enter**.

using the space bar and backspace key, move the selection box to the required item, and then press **Enter**.

3.   Icons

Once you select an option such as **Patients**, icons will show near the top of the screen. Very occasionally, icons may seem to be missing: if this happens, quit out of OPAS and run the system again to bring them back.

Icons are a quick way of accessing some of the more common actions you will carry out.

To select an icon, single click with the left mouse button on that icon. Remember that the tip of the cursor arrow must be on the required icon.

 If you are not sure what a particular icon does:

> move the cursor into that icon with the mouse

> hold down the left mouse button (but do not let go)

> a line of information at the bottom left of the screen appears which tells you what that icon does

> if you want, move the cursor to another icon (still holding down the left mouse button): the text changes to show what that icon does

> if you want to select one of the icons, make sure the cursor is in that icon and let go of the left mouse button

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

The icons on any particular screen give access to the more common actions available from that screen, but all the actions can be selected from the pull-down menus.

4.   Pull-down menus

These give access to the full range of actions available from that particular screen and are above the icons.

To select a pull-down menu item with the mouse, move the tip of the cursor arrow onto that word and single click with the left mouse button. Some of the items carry out that action immediately while others show a sub-menu, from which you select the required item in the same way.
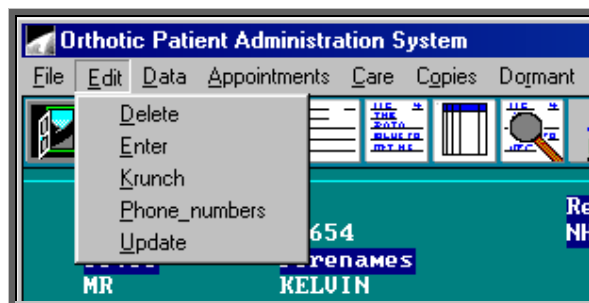
If you prefer not to use the mouse you can select options from the pull-down menu using the keyboard.

To select a pull-down menu item from the keyboard, press and release the **Alt** key: the first menu item will be highlighted.

Either press the underlined letter of the item required (e.g. E for Edit), or use the arrow keys to move the highlight to the item required, and then press **Enter**.

If a sub-menu appears, again use either the arrow keys to move the highlight or press the required underlined letter (e.g. U for Update).

5.   Pop-up menus

These appear when you are entering data into certain fields and make life easier by allowing you to select from a list of relevant data rather than having to type the information in. This saves time and prevents typing errors.

In some cases, the pop-up menu appears automatically as soon as you move into that field; in other cases the pop-up menu appears when you press **Tab**.

(N.B. Where pop-up menus appear automatically can be controlled by you within Utilities – Choices – Defaults – *see Utilities – Note 5. Choices - Defaults*)

An example is when entering the GP into a new patient's record.

Doctor	Practice	Postcode	Referenc
ANDERSON MG	LENSFIELD ROAD MED PRAC.	CB2 1EH	G0102926
ADLER S	682 FINCHLEY ROAD	NW11 7NP	G0105912
ALEXANDER PJ	10 WEST END	HU14 3PE	G0107725
ANDERSON CF	THE HEALTH CENTRE	TS18 1HU	G0108324
ASHER PN	94-96 HOLLOWAY ROAD	N7 8JG	G0108922
ARTHUR RA	153 CANNON HILL LANE	SW20 9DA	G0109325

All pop-up menus work in the same way.

You can search for the record you want in any of the columns shown (in this example Doctor, Practice, Postcode or Reference). To search in a particular column, move the green highlight into that column by using the right and left arrow keys on the keyboard or by clicking on the column with the mouse)

Then type the data you want to find. As you type, the system changes the records to being in alphabetical order by that column and zooms in to the nearest match to what you have typed.

Thus if you are searching for a particular GP by name and type 'M' the first GP with a name beginning with **M** shows:

If you now type 'AC' the first GP beginning with **MAC** shows:

If you now type 'H' the first GP beginning with **MACH** shows:

Thus the quickest way of selecting a record is to type enough to get quite close to the record required, then use `Up`, `Down`, `PgUp` and `PgDn` to move the highlight to the required record, then press `Enter` to select that one. How many letters you will have to type to get close to the required record depends on how many adjacent records there are: for instance if the GP's name begins with **X**, you are not likely to have to type any further letters to zoom in closer.

The letters typed to zoom in are case-sensitive, so if the list contains upper-case data, you must type the search letters in upper case, not lower case. If the search jumps to the last record, you have probably entered your data in the wrong case.

6.   Standard menu options

The following options appear on a number of screens and are very similar or identical in operation.

For each one, the various ways in which it can be selected are shown:

the icon (if any)

the pull-down menu (if any), showing the underlined letters

the key press (if any)

Exit

File, Exit   `Esc`   or   single click anywhere on the screen with the right mouse button

This takes you back one stage e.g. to the previous menu. From the Main Menu, it allows you to quit to the Windows Desktop. In general, `Esc` will abandon what you are currently doing and take you back one stage.

Enter

Edit, Enter

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

Update

Edit, Update

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

Browse
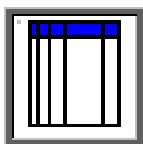
Data, Browse

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

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

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

Find

Data, Find

This allows you to search for a particular record e.g. if you are in the Patients screen, it allows you to find a particular patient.

When you select Data, Find, a list of fields that you can search by will appear for you to select from. The fields shown depend on the screen you are using at the time (Patients, Orders etc).

Select the field you want to search on: for instance, if you want to find a patient and you know their Hospital Number but not their Surname, you would select Hospital_No.
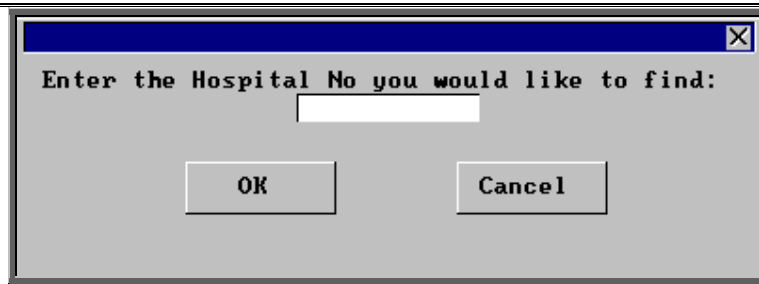
Then type the data you want to find and select OK by clicking on the OK button with the mouse or by pressing **Enter** twice.

You do not need to type all of the data e.g. if you are finding the surname **Thistlethwaite**, you could just type 'Thistle' and the system will find the first patient with a surname beginning with **Thistle**.

Using Find also automatically sorts the records in order by the field you have chosen: for instance, if you use Find to find a particular surname, the records will then be in order by surname. You may find it useful to change into browse mode either just before or just after using Find, since it will be easy to see patients with similar surnames to the one the system has selected as being the best match; this may help you check that you have the correct patient.

If the field you want to use to find is not shown in the list (e.g. a patient's NHS Number), you can use Sequential_Search to search on any field in the database: a list is shown, from which you select the field required by moving the pointer and pressing **Enter**. This method, although it allows you to find using any field, is much slower than selecting the field required from the main list.

Sort
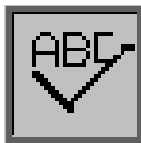
Sort

This allows you to change the order of the records shown on the screen e.g. you can put the patients in order by Surname.

When you select Sort you will be asked the field you wish to sort by. The specific fields shown depend on the screen you are using at the time (Patients, Orders etc).
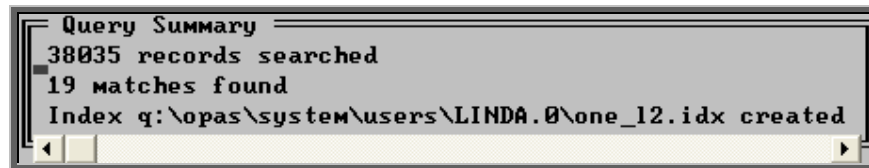
Select the field you want to sort on: for instance, you may want to put the patients into order by Surname. You are then given three options.

Whole_File   puts the whole database into order: this is the option you would normally select

One_Only   allows you to select only records that match the criterion you
                  choose: for instance, you might want to see only patients with the
                  surname Bloggs. The difference between using this and using Find
                  to find Bloggs is that using Find shows all the records, with the
                  current record being the nearest match, but Sort, One_Only shows
                  only the records selected. This is useful if, for instance, you want to
                  send a letter to only those patients

Range   allows you to select records within a range, for instance patients
                  with surnames from **A** to **C**. You are asked to enter the lower, then
                  upper limit: note that if you want to find patients from **A** to **C**, i.e.
                  including **CZERNY**, you must enter **CZZZ** as the upper limit.
                  Entering just **C** as the upper limit will not include any patients after
                  C in the alphabetical list of patients, e.g. **CHARLES** will not be
                  included.

Both One_Only and Range show you the number of records found that match the
criteria you set and isolates those matches (by placing them in an index).

```
┌─ Query Summary ════════════════════════════════╗
│ 38035 records searched                          │
│ 19 matches found                                │
│ Index q:\opas\system\users\LINDA.0\one_12.idx created │
│ ◄ │                                           ► │
```

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

Sort, Special_Sorts shows a list of pre-defined sort definitions for specific purposes.

This list initially includes all the sort routines available, most of which will not be
relevant to the screen you are currently using: to show only the relevant ones, select
This_View from the options at the top of the screen.

From here, depending on any restrictions applied to your login, you may be able to
edit the pre-defined sort criteria and create new sort criteria: we advise you to tread
carefully and make sure you know what you are doing first!
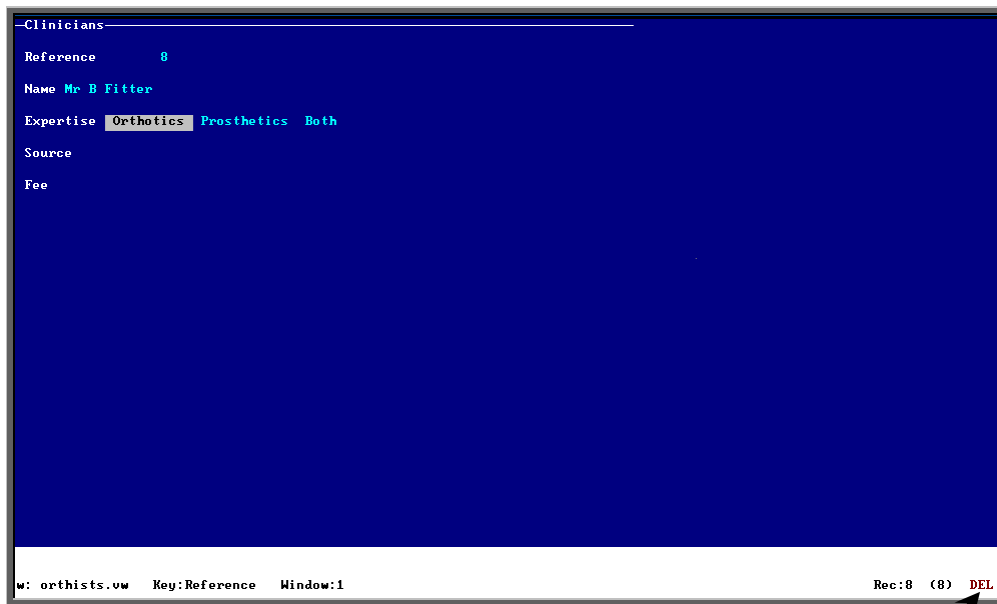
Print
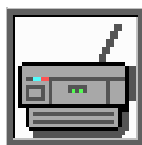
          File, Print

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

Delete

     Edit, Delete

This normally marks the current record (patient, order etc: whatever is currently showing on the screen) to be deleted.

Deleted records remain visible until they are permanently removed by the System Administrator. The record will show that it is deleted, either by showing Del at the bottom right corner of the screen

            or by showing a message on the screen
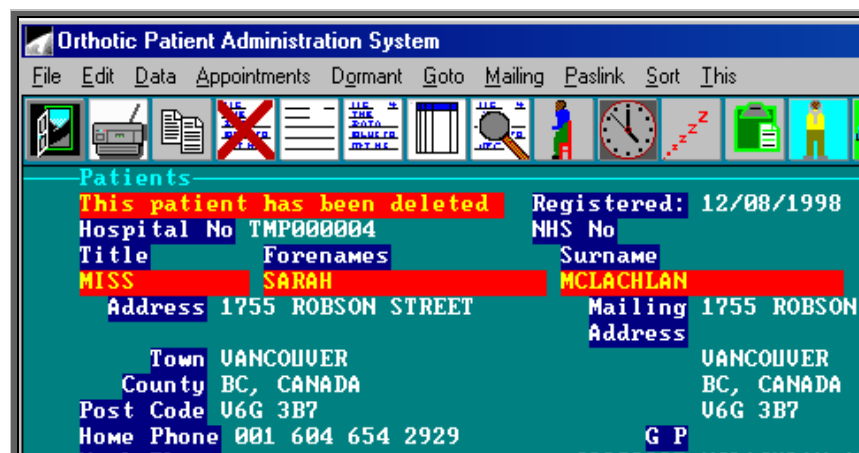
If you delete a record by mistake, in most cases you can simply select Delete again and this will re-activate the record.

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

7.   Standard Keys

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

Key	Description
F2	enters today's date
F3	moves back to the previous field
F4	moves on to the next field
F7	reformats multiple line fields to wrap correctly within the box
F8	deletes the data in the current field
Ctrl-F8	deletes the data in the current line (when in a table)
F9	inserts the same data that you entered in that field in the previous record
Ctrl-Enter	saves the current record
Esc	abandons the current record (you are asked whether to save changes if you were adding or editing data at the time)
Tab	where relevant, shows a list of choices (in a pop-up menu) from which a selection can be made. Either move the highlight with the arrow keys or, for longer lists e.g. the list of GPs, type the data needed: as you type, the system shows the nearest match.

If more than one field is shown, you can move right or left along the columns shown to highlight the field you wish to search by. Then type the data required for that field. Press **Enter** to select the currently highlighted item.

Key	Description
Shift-Right Arrow	will highlight text.
Ctrl-C	will copy highlighted text.
Ctrl-X	will cut highlighted text.
Ctrl-P	will paste copied or cut text.

8.   Moving around records

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

> **>**   Moves to the next record   **F6**

> **<**   Moves to the previous record   **F5**

> **»**   Moves to the last record   **Ctrl-End**

> **«**   Moves to the first record   **Ctrl-Home**

> **⌃**   Page up   **PgUp**

> **⌄**   Page down   **PgDn**

9.   Tables

A table is a list of records within a master record: for instance a list of orders for a patient within that patient's record:

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

Only a few records can show on the screen at one time, but there may be more. To see further records in the table, press **Alt-T** to see a list of tables available and select the required one (Orders in the above example) or click inside the table with the mouse. Then use **PgDn** and **PgUp** to scroll up and down the table.

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

10.   Printing to screen

A number of reports can be either shown on the screen or printed on the printer: if so, you will be asked to select:

```
┌────────────────────────────────────┐
│                                 [X] │
│ Print 16 records                    │
│   ┌────────┐  ┌─────────┐ ┌──────┐  │
│   │ Screen │  │ Printer │ │ File │  │
│   └────────┘  └─────────┘ └──────┘  │
│                                     │
└────────────────────────────────────┘
```

If you select Screen, the first page of the report is shown:

The following keys can be used:

F5 shows the previous page

F6 shows the next page

F7 reduces the magnification

F8 increases the magnification

Also, the cursor keys can be used to move around the page.

When you have finished, press Esc. This will take you back to the choice of printing to screen, printer or file; so if required you could now print that report to the printer.

Patients

1.   Introduction

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

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

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

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

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

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

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

Patient Screen

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

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

Patient Screen (Long)

```
File  Edit  Data  Appointments  Dormant  Goto  Mailing  Message  Paslink  Sort  This
```

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

              All patient notes MUST be treated as confidential
    Medical Notes
    Date      Notes                                              Category
    25/08/2000 Hospital number changed from TEMP000011 at 20:37:50  UPDATE
    05/11/1997 Diabetic


    Orders
    Date of Or Order No  Sup Desc                         Received
    24/02/2004 G00422     048 SHOES



    Appointments
    Date:     Day Time: At:                          With:
    22/10/2003 Wed 10:00 Appliance Department         Mrs Orthotiste



    Prescriptions
    No:      Desc:                              From:    For:




    DNAs                Carbon Copies
    On:      At
    22/10/2003 10:00:00


    DNAs    1

    Addresses
    Add:                 PC:
    42 Main Avenue       JT1 2ER
```

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

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

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

```
┌ Tables ═══════════════════════════════════════════════════════════════╗
║ ═▶ Medical_Notes      Orders         Appointments    Prescriptions     DNAs ║
║    Carbon_Copies                                                            ║
╚════════════════════════════════════════════════════════════════════════════╝
```

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

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

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

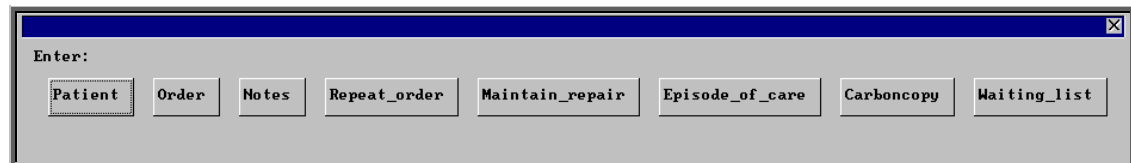|		
Medical Notes		(or Goto, Notes)
Orders		(or Goto, History, Current)
Appointments		(or Appointments, Current)
Prescriptions		(Goto, Prescriptions)
Carbon Copies		(Goto, Copies)
Address history		(Goto, Addresses)

Patient Screen (Short)

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

Medical Notes		(or Goto, Notes)
Orders		(or Goto, History, Current)
Appointments		(or Appointments, Current)
Prescriptions		(Goto, Prescriptions)
Carbon Copies		(Goto, Copies)
Address history		(Goto, Addresses)

2.   Entering a new patient

Menu: **Patients**

To add a new patient, click on the 'enter' icon [icon] (or <u>E</u>dit, <u>E</u>nter) and the box below will appear.

```
Enter:
  Patient    Order    Notes    Repeat_order    Maintain_repair    Episode_of_care    Carboncopy    Waiting_list
```

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

At the bottom of the screen you are asked for the Hospital Number. If you know the Hospital Number for this patient, enter it; if not, type **?** and a temporary number will be allocated to this patient by the system. This temporary number can then be changed to the actual Hospital Number later by updating the patient. Temporary patient numbers are normally prefixed with TMP, but this can be changed if required (*see Utilities – Note 25. Order numbers*).

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

Hospital No	shows automatically as the number you entered and cannot be changed while entering a new patient. You can edit the hospital no later if you need to.
Registered	shows automatically as today's date and cannot be changed.
By	shows automatically as your login name and cannot be changed.
NHS No	is the patient's National Health Service number and is optional.
D O B	is the patient's date of birth: enter this as ddmmyyyy, e.g. 31121911. You do not need to put a / between the day, month and year – they will appear automatically.
Age	calculates automatically from the *DOB* and cannot be changed.

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

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

The Patient screen can be customised in order to control which fields have pop-up menus appearing automatically, and which fields you have to press the Tab key to access the pop-up menus. Also, if you mainly enter the same details in a field i.e. *County*, this field can be set to default to the required County to cut down on typing (see Utilities – Note 5. Choices - Defaults).

3.   Finding a patient's record

Menu: **Patients**

To find a patient click on the 'find' icon ![find icon] (or <u>D</u>ata, <u>F</u>ind) and the menu at the top of the screen will change so that you can choose how you wish to search for the patient.

Orthotic Patient Administration System - Logged in as LINDA at 05:52 on 05/11/2003

Hospital_No   NHS_No   D_O_B   Surname   Shortname   Post_Code   GPref   G_P   Purchaser   ConsRef: Review   DOR   Sequential_Search

Click on the field that you wish to search by (<u>S</u>urname, Sh<u>o</u>rtname and <u>H</u>ospital_No are the most frequently used).

Enter the Surname you would like to find:
SMITH▄

OK   Cancel

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

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

If you are looking for a patient with a surname that occurs frequently it may be quicker to search by Sh<u>o</u>rtname as you can then specify the initial of their forename to narrow down the search. Type in the first 8 characters of the surname, a space, and then the initial of the forename. N.B. Searching by Shortname is not case sensitive i.e. it does not matter if you type the Shortname you are looking for in upper or lower case.
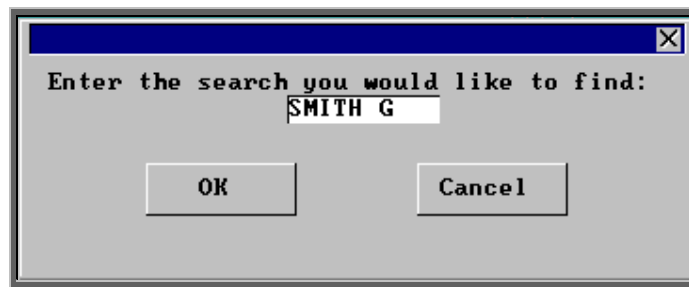
This will then take you to the first G SMITH. If there is more than one G Smith look for the required patient by stepping through the records by clicking on the 'arrow' icon (or **F6**), or by selecting the 'browse' icon (or Data, Browse) to see those records that match your search in a list.   Note: When searching by Shortname the patient records will not be in <u>true</u> alphabetical order. I.e. in the example above, all the G Smiths will appear together but Geoff may come before Gary.
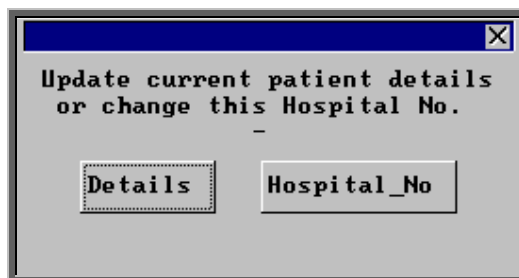
4.   Amending a patient's record

Menu: Patients

To amend a patient find the patient you wish to edit and click on the 'update' icon (or Edit, Update) and the box below will appear.

Details

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

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

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

> *Title*
> *Ethnicity*
> *GP*
> *Purchaser*
> *ConsRef* (Referrer)
> *Clinician*
> *Transport*

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

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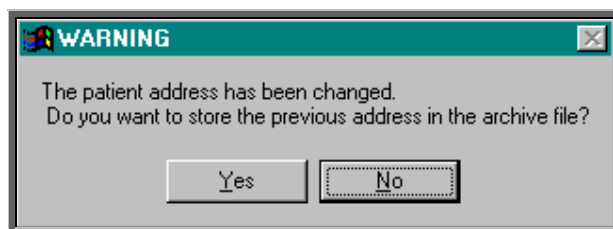
Select Yes if you wish to keep a record of the old address.

Previous addresses of a patient can be seen by finding the Patient record and clicking on <u>G</u>oto at the top of the screen and then selecting <u>A</u>ddresses. If you only want to

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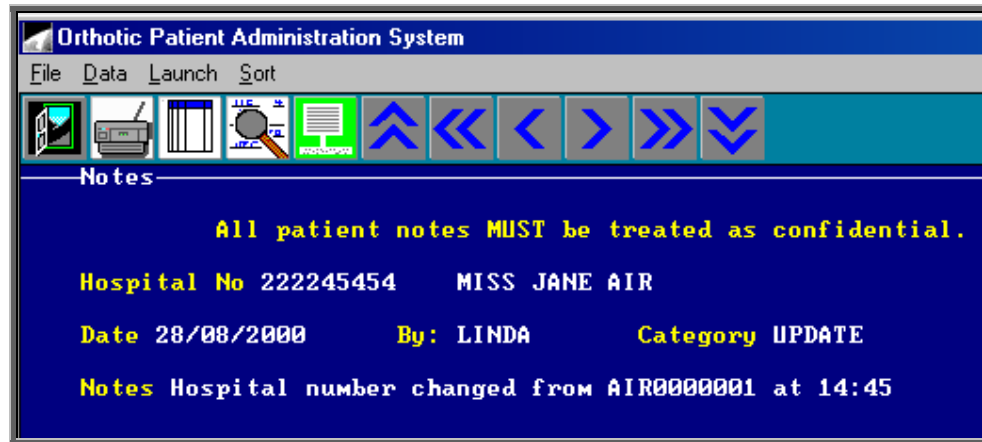

Hospital number

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

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

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

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

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

5.   Changing the mailing address

Menu: **Patients**

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

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

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

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

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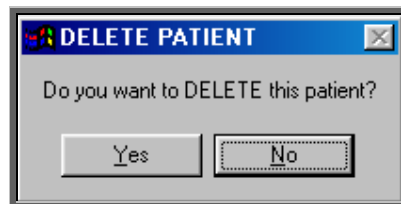
DELETING

Delete current mailing address?

Yes   No

6.   Deleting a patient

Menu: Patients

To delete a patient find the patient you wish to delete and click on the 'delete' icon [icon] (or Edit, Delete) and the box below will appear.

DELETE PATIENT

Do you want to DELETE this patient?

Yes   No

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

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

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

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

Deleted patients can be moved from the live Patients file into the Ex-Patients file by running Utilities - Ex-patients - Archive. You must take a back up before running the archive option and be the only user in the system.

Marking a patient as deceased

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

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

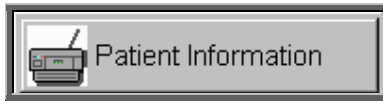The patient record will then show that the patient is deceased.

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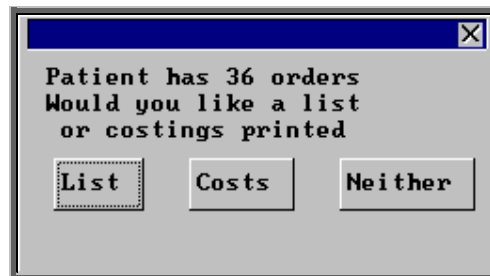
7.   Printing options

Menu: **Patients**

Click on the 'print' icon (or <u>F</u>ile, <u>P</u>rint) to see the print menu.

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

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

<u>List</u>

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

<u>Costs</u>

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

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

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

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

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

By selecting **Mail Merge** and then clicking on This_view, you will see the letters and forms that can be printed from the **Patient** screen. You have the opportunity of setting up to 26 standard patient letters that can be merged with patient information. There are also two forms, HSA5 and WF1, set up for you.

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

How to print HSA5 and WF1 forms

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

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

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

Select **Mail Merge**

Click on This View at the top of the screen

Highlight the form you wish to produce

Click on Run

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

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

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

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

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

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

8.   Prescriptions

Menu: Patients

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

To enter a new prescription, find the patient that you want to add a prescription for,

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

```
Enter:
   ┌──────────┐  ┌───────┐  ┌───────┐  ┌──────────────┐  ┌───────────────┐  ┌────────────┐  ┌──────────────┐
   │ Patient  │  │ Order │  │ Notes │  │ Prescription │  │ Episode_of_care│  │ Carboncopy │  │ Waiting_list │
   └──────────┘  └───────┘  └───────┘  └──────────────┘  └───────────────┘  └────────────┘  └──────────────┘
```

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

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

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

Referrer   Referrer will be brought through from the patient record but if you
                need to change it press the **Tab** key to see the list of your referrers
                and make an alternate selection. Otherwise press the **Enter** key to
                move to the next field.

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

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

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

Notes   are entered as required.

Updating prescriptions

Find the patient that the prescription relates to and click on <u>G</u>oto, <u>P</u>rescriptions. Find
the relevant prescription if there is more than one and then click on the 'update' icon

 (or <u>E</u>dit, <u>U</u>pdate) to amend any of the details entered on the prescription.

Cancelling prescriptions

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

Expired prescriptions

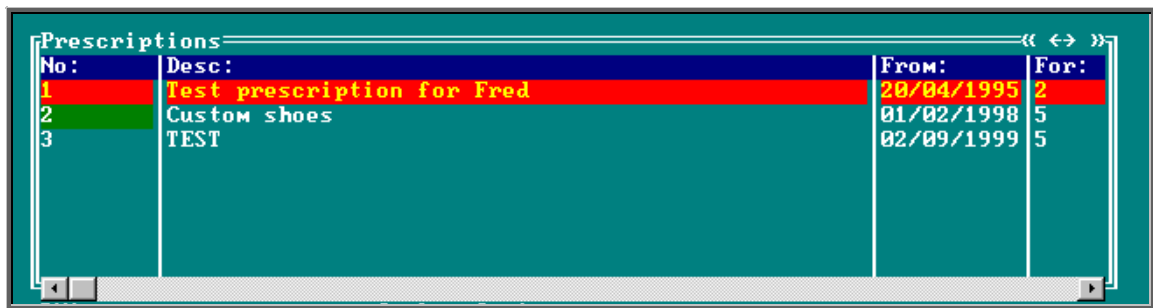Prescriptions appear in a red banner once they have expired.

9.   Adding an Order

Menu: **Patients**

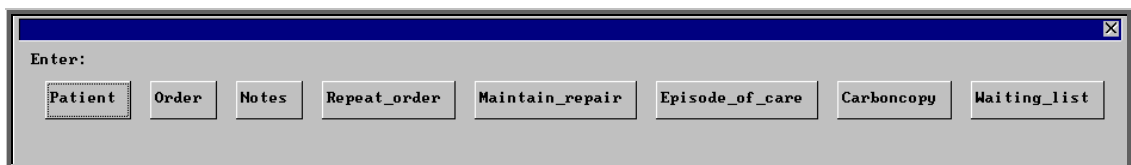To add an order, find the patient that you want to add the order for.

If you are not using prescriptions move onto step 2

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

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

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

Enter:

| Patient | Order | Notes | Repeat_order | Maintain_repair | Episode_of_care | Carboncopy | Waiting_list |

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

Note: If **Order** is not an available option you are in the 'short' **Patient** screen. To change back to the 'long' **Patient** screen, click on the 'swap' icon (or **File**, **Swap**)
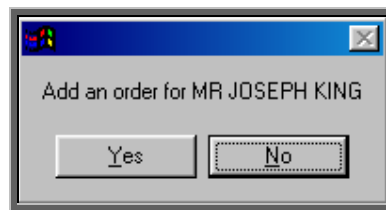
You are asked to confirm that you wish to add an order for this patient. If you have forgotten to find the patient before trying to add an order, this is your opportunity to abandon entering an order.

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

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

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

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

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

DOB   DOB will be brought through from the patient record.

Purchaser   Purchaser will be brought through from the patient record but if you need to change it press the **Tab** key to see the list of your purchasers and make an alternate selection. Otherwise press the **Enter** key to move to the next field.

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

Order Number   The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities – Note 25. Order numbers). You can overtype this as long as the order number you type is unique (i.e. has not been used before and is unlikely to be automatically offered on a future order).

Supplier   Select the supplier you are ordering the goods from. (If the supplier does not appear in the pop-up list they will need to be added in Utilities – NSI – Suppliers.)

Cross Ref or   This is an optional field where you may wish to quote a supplier's
Hsp Order No   reference number or an internal reference number.

Description   50 characters available to describe in simple words what the order is for. This description will appear in appointment letters so should be terminology understood by the patient. As well as being able to free type in this field you can also select a description from a pop-up list by pressing the **Tab** key. (Standard descriptions to appear in the pop-up should be set up in Utilities – Choices – Descriptions)

Orthosis Code	This is a mandatory field. You must select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes)

Referrer   Referrer will be brought through from the patient record but if you need to change it press the **Tab** key to see the list of your Referrers and make an alternate selection. Otherwise press the **Enter** key to move to the next field.

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

Paid   If the patient has to pay for the goods, (e.g. the orthosis incurs a prescription charge) the date they pay can be entered here in the format ddmmyyyy. To leave this field blank press the **Enter** key.

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

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

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

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

A if the order will need an appointment to be made for fitting. When the order is received from the supplier, the system will automatically make an appointment.

C if the order is to be collected but does not need an appointment: when the order is received from the supplier, the system will generate a collection letter to advise the patient that the order is ready for collection.

E if the order will be fitted during an existing appointment for that patient. The system will check the existing appointments for the patient and link the appointment to the order by automatically entering the order details onto the appointment and inserting the date of the existing appointment into the *Appointment* field on the order. If the patient has more than one future appointment you will be asked to select which appointment you wish to link the order with.

OPAS will also check that the appointment date is after the expected supply date on the order. If it is not, you will get the following message:
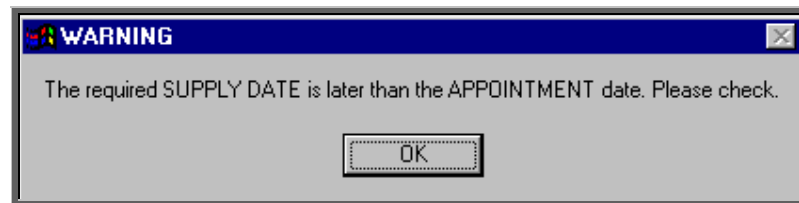
T if the order needs to be taken to a ward. The information will appear at the bottom of the next clinic and can appear on the clinic list if required.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

If the item you are looking for is not in the list, press the **Esc** key to make the pop-up list disappear and leave the code field blank. If the item is not in the pop-up list and it is an item you order regularly you can add the item as a Non Scheduled Item (Utilities – NSI – Items see Utilities – Note 23. NSI) so that it appears in the pop-up list in future.

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

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

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

(V)AT   *V* shows the rate of VAT for that item, as

> **S**   standard
> **E**   exempt
> **Z**   zero-rated
> **R**   reclaim.

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

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

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

If the price does not appear automatically it will have to be entered manually. If this is an item you order regularly you can add the price as a Non Scheduled Price (Utilities – NSI – Prices *see Utilities – Note 23. NSI*) so that the price will appear automatically in future.

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

Notes   Any additional information can be entered here.

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

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

Technician If required, a Technician can be specified for the order. This is for those hospitals with an internal workshop. Press the **Tab** key to see the list of options. The Technicians seen in the pop-up list are created in Utilities – Choices – Technicians.

Ward If the patient is an in-patient the Ward they are in can be entered here. Press the **Tab** key to see the list of options. The Wards seen in the pop-up list are created in Utilities – Choices – Wards.

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

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

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

10. Amending an order

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

1. From the patient screen

Menu: Patients

Find the patient whose order you wish to amend.

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

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

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

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

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

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

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

2.   From History

Menu: History - Orders

Find the relevant order and then click on the 'update' icon (or <u>E</u>dit, <u>U</u>pdate).

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

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

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

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

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

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

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

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

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

11.   Printing/Faxing orders in batch

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

Menu: **History – Orders**
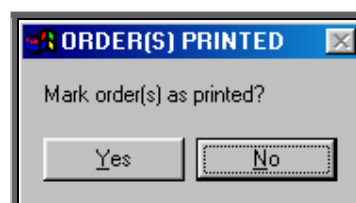
1.   Printing to the printer

Click on the 'print' icon ![print icon] (or <u>F</u>ile, <u>P</u>rint) and then select **Orders** from the print menu.

The system finds those orders which have not yet been printed and asks how many copies you require:
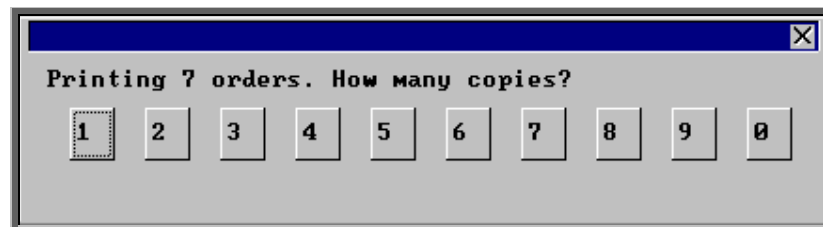
```
┌─────────────────────────────────────────────────────[X]─┐
│ Printing 7 orders. How many copies?                      │
│                                                          │
│  [1]   [2]   [3]   [4]   [5]   [6]   [7]   [8]   [9]  [0] │
│                                                          │
└──────────────────────────────────────────────────────────┘
```

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

```
┌─ ORDER(S) PRINTED    [X]─┐
│                          │
│  Mark order(s) as printed? │
│                          │
│   [ Yes ]    [ No ]      │
└──────────────────────────┘
```

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

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

2.   Faxing orders direct to suppliers

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

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

The system finds those orders that have not yet been printed and asks whether you wish to print or fax them.
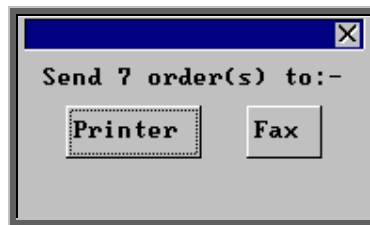
If you select the Printer option by clicking on the Printer button with the mouse or by typing P, then you will continue as above by been asked how many copies you require.

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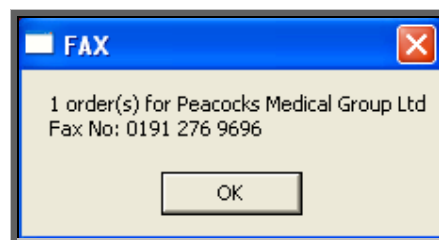

On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

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

Once the fax has been sent, if there are orders to another supplier, another prompt will appear with the fax number of the next supplier. This will continue until all the suppliers in the batch have been faxed.
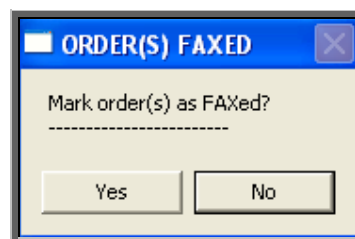
If orders are found for companies that are not set up for faxing (**Utilities – NSI – Fax** see Utilities – Note 9. Choices - Fax), the following prompt will appear.
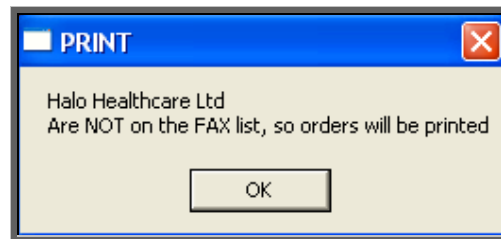
Click on **OK** and then select how many copies to be printed instead..
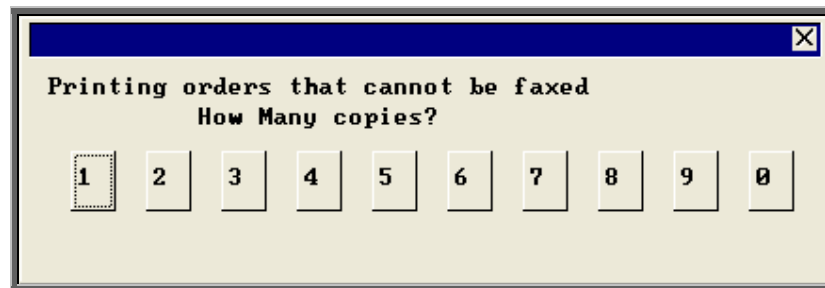
Then you will be asked if you wish to mark the orders as faxed.

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

3.   Reprinting/Refaxing orders

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

printed, this is done as follows. (If you want to print/fax a specific order *see Patients – Note 13. Re-printing individual orders and Note 14. Re-faxing individual orders*).
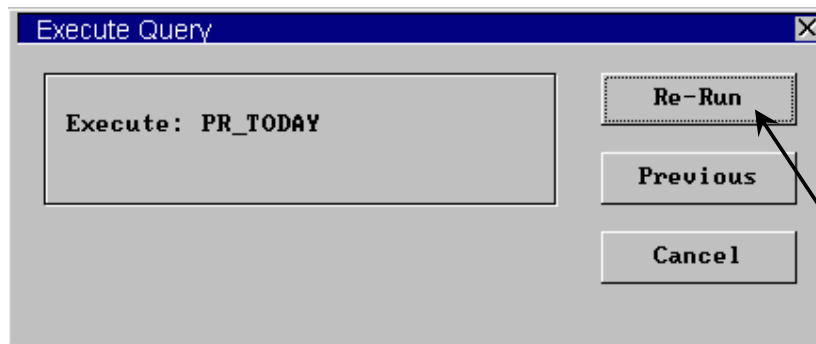
Menu: History – Orders

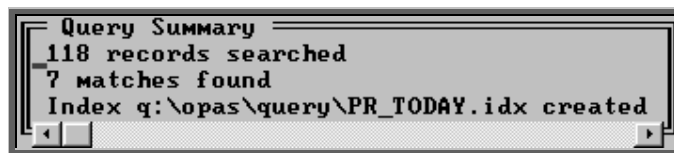Click on Data and then Query

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

Click on Run

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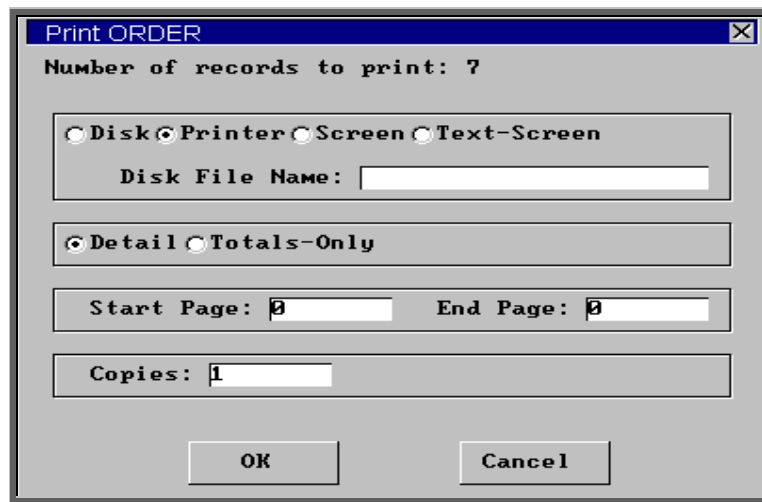
Click on Run or Re-Run.

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

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

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

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

Click on Run.

```
┌─────────────────────────────────────────────────────┐
│ Print ORDER                                      [X] │
│ Number of records to print: 7                        │
│                                                      │
│   ○ Disk ⦿ Printer ○ Screen ○ Text-Screen            │
│       Disk File Name: [                        ]      │
│   ┌──────────────────────────────────────────────┐   │
│   │ ⦿ Detail ○ Totals-Only                       │   │
│   └──────────────────────────────────────────────┘   │
│   ┌──────────────────────────────────────────────┐   │
│   │ Start Page: [0]          End Page: [0]        │   │
│   └──────────────────────────────────────────────┘   │
│   ┌──────────────────────────────────────────────┐   │
│   │ Copies: [1]                                   │   │
│   └──────────────────────────────────────────────┘   │
│                                                      │
│        [    OK    ]            [  Cancel  ]           │
└─────────────────────────────────────────────────────┘
```

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

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

12.   Printing orders as they are raised

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

There is also the facility to e-mail orders direct to the supplier as they are raised. This will be covered in future training sessions and is documented in the main manual.

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

```
┌──────────────────────────────────────────────┐
│ Use large icons        Yes                    │
│ Instant Invoice        1   GRN 2 Orders1      │
└──────────────────────────────────────────────┘
```

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

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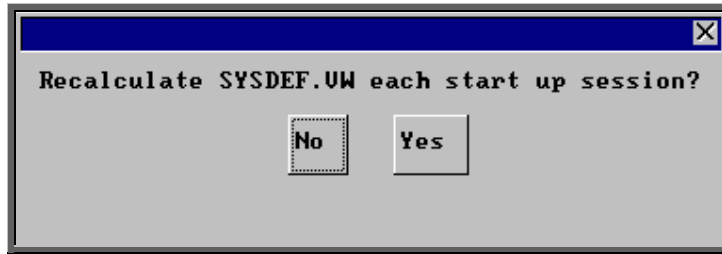
Press the **Enter** key.

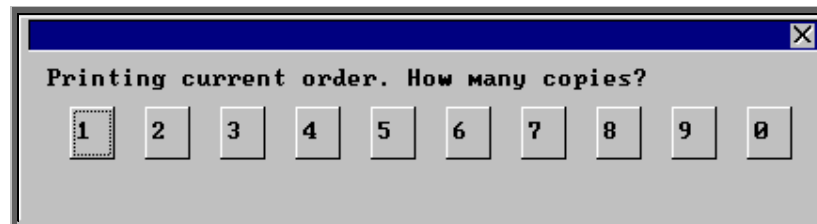# 13.   Re-printing individual orders

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

Menu: **Patients**

Find the patient whose order you wish to print.

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

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

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

ORDER(S) PRINTED

Mark order(s) as printed?

Yes   No
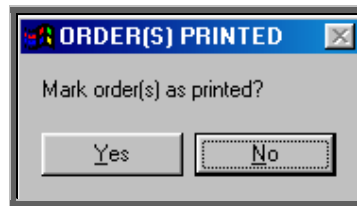
If you select Yes to mark the order as printed, the order will not be selected for printing when you next batch print orders from History – Orders.

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

14.   Re-faxing individual orders

Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen (see Utilities – Note 16. Choices - System)
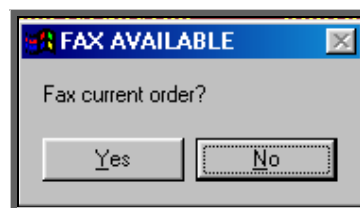
Menu: Patients

Find the patient whose order you wish to fax.

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

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

FAX AVAILABLE

Fax current order?

Yes   No

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

If you do not want to fax the current order, and say No, the following prompt will appear.
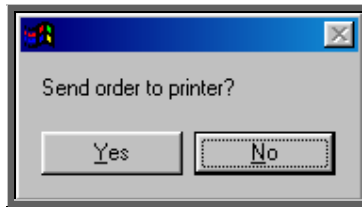
On selecting Yes you will then be given the print box where you can choose how many copies you would like to print.

If, however, you select Yes a prompt will appear giving the fax number for the supplier on the order.
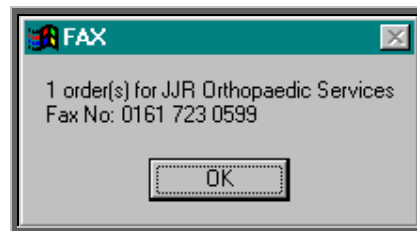
On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

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

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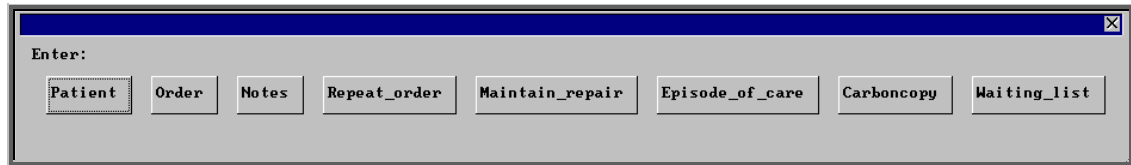
15.   Entering medical notes

Medical notes can be added directly to the patient record, or, if a care-episode has been set up for the patient, notes can be attached to a specified episode of care.

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

Menu: Patients

1.   Adding a medical note to the patient

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

```
Enter:
  Patient   Order   Notes   Repeat_order   Maintain_repair   Episode_of_care   Carboncopy   Waiting_list
```

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

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

Hospital No	Hospital No and patient name will be brought through from the patient record.
Date	Today's date will automatically be entered. You can overtype with another date if required.
Category	Select a category from the pop-up list (Categories to appear in the pop-up should be set up in **Utilities – Choices – Note Categories**)

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

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

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

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

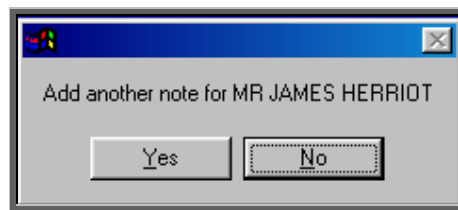|	
Episode	This field is by-passed. It is for use when adding a note to a care episode.
Note	**Adding a standard Note**

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

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

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

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

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

Adding a Note using the 'Video' category

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

Adding a Note using the 'Picture' category

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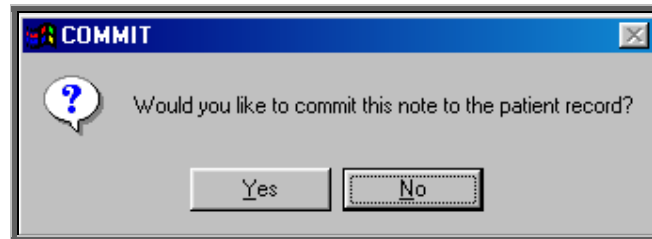
Adding a Note using the 'Temp' category

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

Type in the note, again remembering that the first line of the note is shown in the list of medical notes on the patient's screen, so consider making the first line a summary of the content of the note.
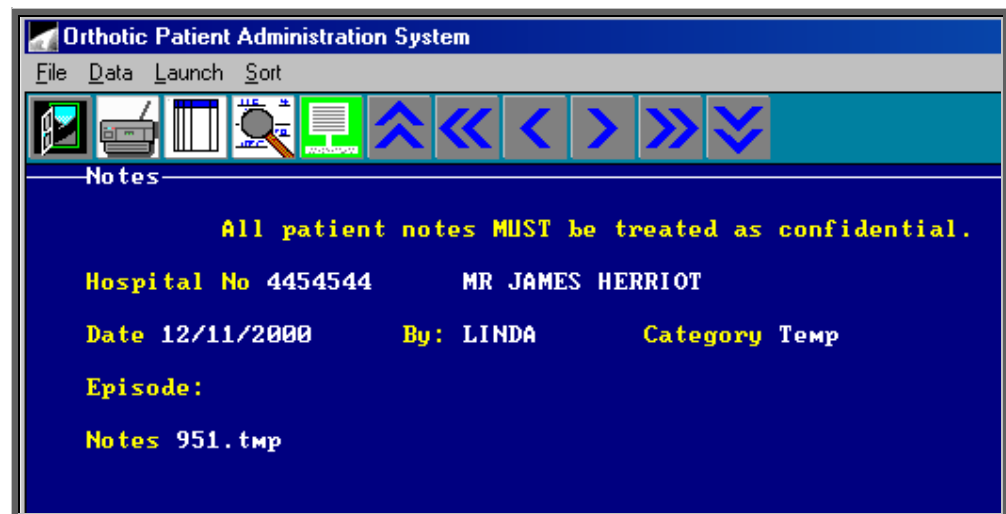
If you wish to print the temporary note press **Alt-P**

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

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

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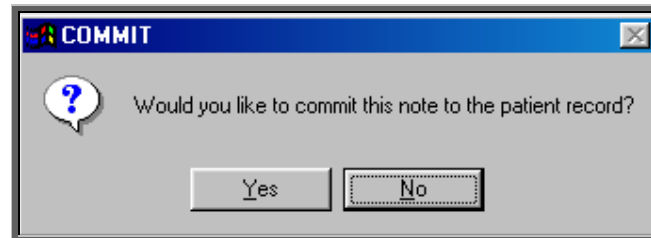

Editing a note entered with a 'Temp' category

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

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

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

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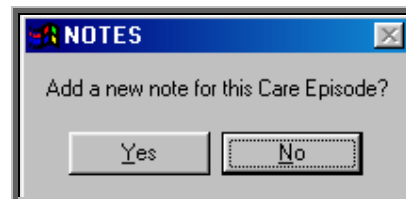
2.   Adding a medical note to a care episode

Find the patient that you wish to add a note and click on the 'care episode' icon (or <u>G</u>oto, <u>C</u>are)

Find the care episode you wish to add a note and click on the 'enter' icon (or <u>E</u>dit, <u>E</u>nter)
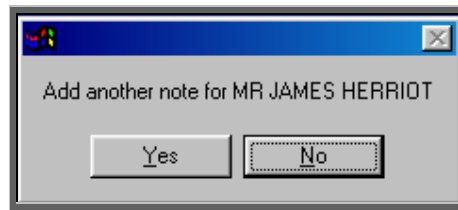

Select **Yes** to continue, or **No** to abandon adding a note.

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

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

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

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

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

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

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

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

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

Note   Adding a standard Note

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

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

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

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

Add another note for MR JAMES HERRIOT

Yes   No

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

Adding a Note using the 'Video' category

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

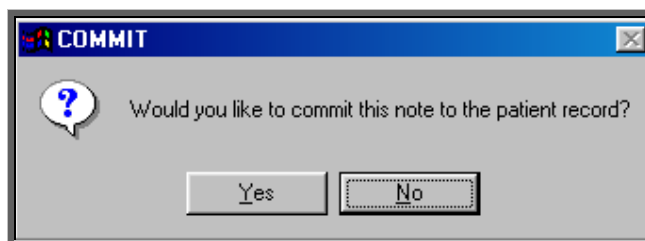## Adding a Note using the 'Picture' category

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

Adding a Note using the 'Temp' category

In the *Note* field press **Ctrl-Enter** or **F10** to be taken to the Text Editor.   The patients name and hospital number will already be entered at the top of the text editor, so that if you choose to print the temporary note to be checked later you will know who the note belongs to. (You will want to take this out before you finally commit the note. This can be done quickly by positioning the cursor on the line you wish to delete and pressing **F8**.)
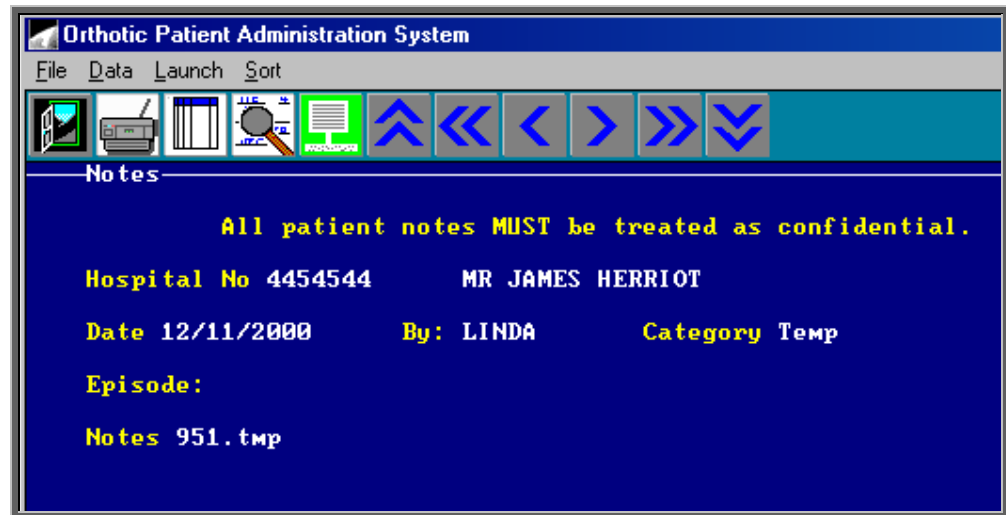
Type in the note, remembering that the first line of the note is shown in the table of medical notes on the patient's screen. Consider making the first line a summary of the content of the note.

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

COMMIT

? Would you like to commit this note to the patient record?

Yes   No

If you select Yes, the text entered in the Text Editor will be copied into the Note field of the note and saved. **You will not be able to edit this note later.**
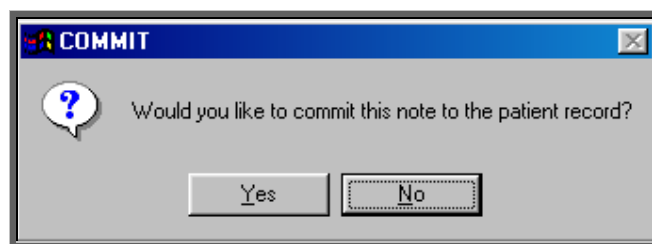
If you select No, the information typed in the Text Editor will be allocated a sequential temporary note number and this number will show in the *Note* field.

Editing a note entered with a 'Temp' category

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

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

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

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

16.   Printing medical notes

Menu: **Patients**

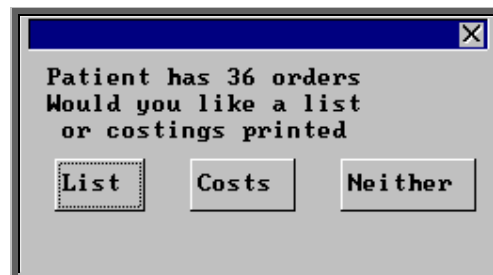## 1.   Patient demographics

Click on the 'print' icon ▯ (or <u>F</u>ile, <u>P</u>rint) and select **Patient Information.**

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

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

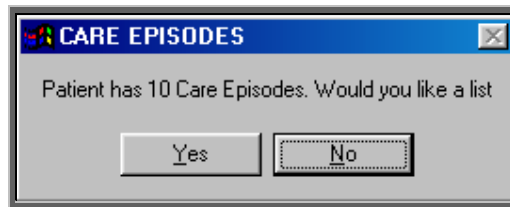From this option you will then be asked if you would like details of the patients orders.

```
┌──────────────────────────────[X]─┐
│                                   │
│  Patient has 36 orders            │
│  Would you like a list            │
│   or costings printed             │
│                                   │
│  ┌──────┐   ┌──────┐   ┌────────┐ │
│  │ List │   │ Costs│   │Neither │ │
│  └──────┘   └──────┘   └────────┘ │
│                                   │
└───────────────────────────────────┘
```

List

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

Costs

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

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

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

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

2.   Individual notes

a)   General or care episode notes

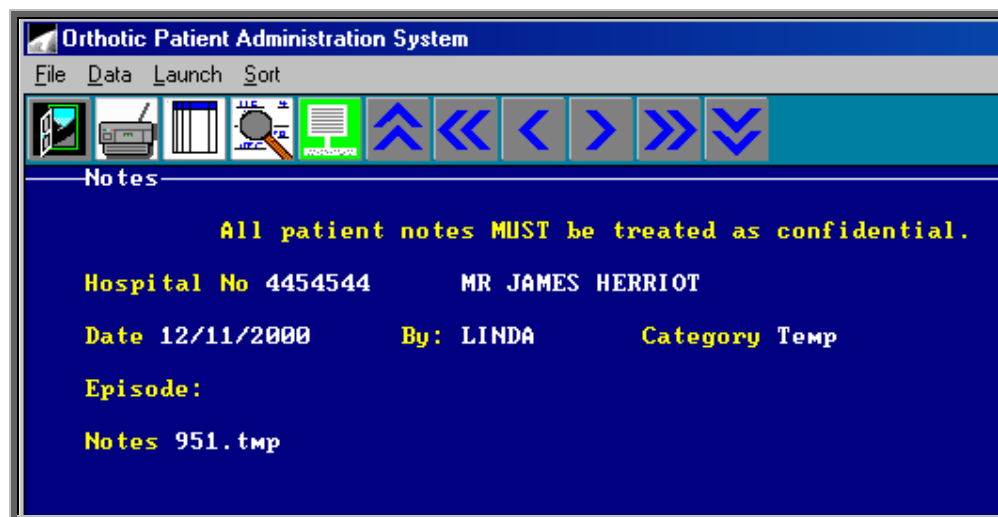Find the note you wish to print (by finding the patient and clicking on the 'notes' icon (or Goto, Notes)).

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

b)   temporary notes

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

Click on the 'launch' icon (or <u>L</u>aunch) to be taken to the Text Editor.

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

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

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

17.   Waiting List

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

a)   Setting up the waiting list categories

Menu: Utilities – Choices – Wait Types.

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

Type	Weighting
Urgent	5
Soon	3
Routine	1

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

These, however, can be amended by clicking on the 'update' icon (or <u>E</u>dit, <u>U</u>pdate), or additional Wait Types can be added by clicking on the 'enter' icon (or <u>E</u>dit, <u>E</u>nter) and entering the type and it's appropriate weighting. The order that you enter the types here will be the order they initially appear in the drop down selection when adding a patient to the waiting list, so you may wish to enter them in priority order.
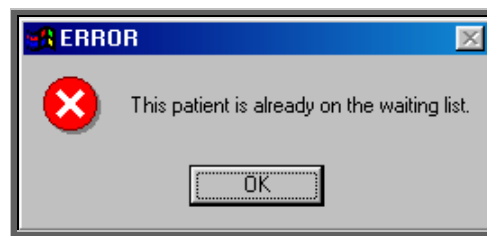
b)   Adding patients to the waiting list

Menu: **Patients**

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

Click on the 'enter' icon [icon] (or <u>E</u>dit, <u>E</u>nter).

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

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


Otherwise you will be taken to the waiting list screen.

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

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

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

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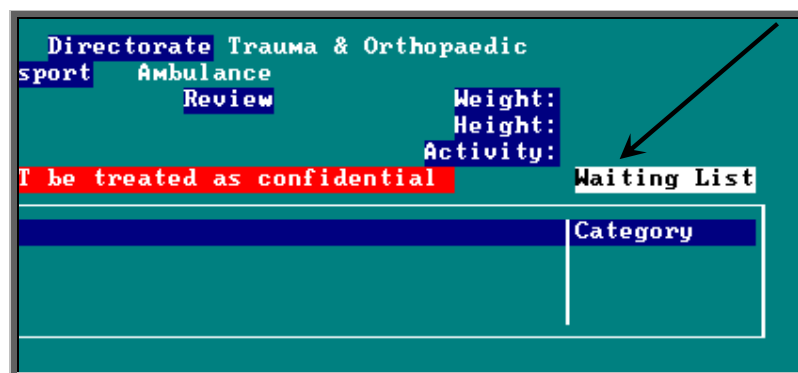
### c)   Accessing the waiting list information

   i)   Menu: Patients

If you are looking at a patient record and can see that they are on the waiting list, click on <u>G</u>oto at the top of the patient screen and select <u>W</u>aiting List.

   ii)   Menu: Appointments – Current – Waiting List

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

When entering the Waiting List screen, you will be asked the order the patients should be displayed in.
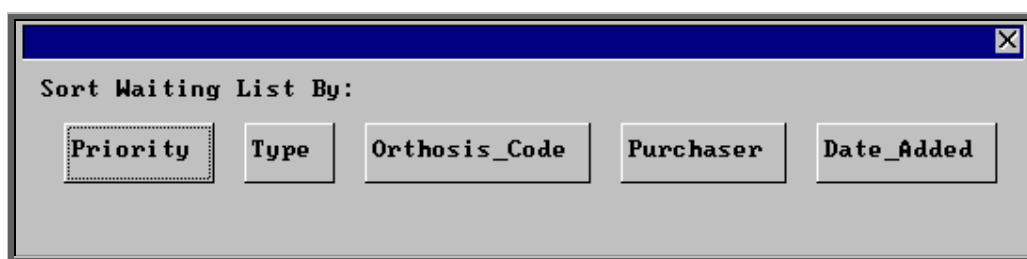
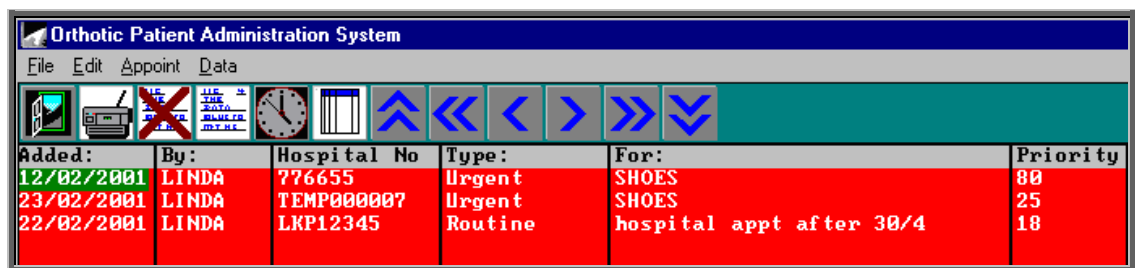| Priority	Each patient has a *Priority* value that is calculated by multiplying the number of days the patient has been on the waiting list by the weighting applied to the type (in Utilities – Choices – Wait Types).

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

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

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

Date Added   The patients will be shown in order of the date they were added to the Waiting List. The patient that has been on the Waiting List longest will be shown first.
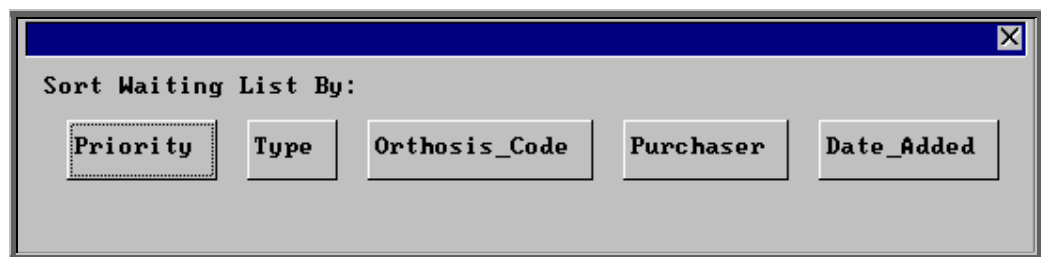
To see the patients as a list, click on the 'browse' icon (or Data, Browse).

d)   Printing the waiting list

Menu: Appointments – Current – Waiting List

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

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

Click on This_view at the top of the screen.

Highlight WAITLIST.

Click on Run at the top of the screen.

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

e)   Maintaining the current waiting list

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

i)   Editing the Waiting List

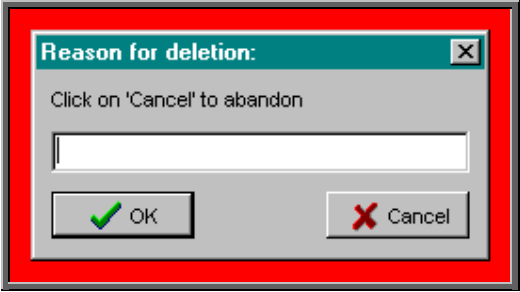If you wish to change the *Type, For* or *Orthosis Code* allocated to the patient, click on the 'update' icon (or <u>E</u>dit, <u>U</u>pdate). To change the *Type* or *Orthosis Code* press the **Tab** key to see the list of available options. Press **Ctrl-Enter** to save the changes made.

ii)   Deleting patients from the Waiting List

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

If you wish to remove a patient from the waiting list without making an appointment then click on the 'delete' icon (or <u>E</u>dit, <u>D</u>elete).

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

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

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

Utilities

18.   Choices – Transport

19.   Choices – Wait Types

20.   Choices - Wards

21.   File Fix

22.   Messages

23.   NSI

24.   OPrice

25.   Order Numbers

26.   Password

27.   Training

28.   Upgrade

29.   Users

30.   Who

1.   Choices – Introduction

Menu: Utilities – Choices

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

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

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

This section also includes an option to update the layout of letters.

2.   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 (or Edit, Enter).

Reference   is entered automatically by the system and cannot be changed

Clinician   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

3.   Choices – Contacts

Menu: **Utilities – Choices - 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 (or Edit, Enter)

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

Reference	Reference is entered automatically
Name	Enter the contacts name
Position	Enter their position/job title e.g. Physiotherapist
Location	enter the department where they work e.g. Rehabilitation
Add1 - Add4	4 address lines available for when the contact is external

4.   Choices – Days

Menu: **Utilities – Choices - Days**

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

5.   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.

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. Town) then enter the word you wish to appear automatically i.e. York.

  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 (or 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 45 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.

6.   Choices – Descriptions

Menu: Utilities – Choices – Descriptions

The *Description* field appears on the order and prescription 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 (or <u>E</u>dit, <u>E</u>nter)

To update an existing Description, find the Description you wish to change and click on the 'update' icon (or <u>E</u>dit, <u>Up</u>date).

7.   Choices – Directorates

Menu: Utilities – Choices – Directorates

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

To update an existing Directorate, find the Directorate you wish to change and click on the 'update' icon (or <u>E</u>dit, <u>Up</u>date).

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

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.

8.   Choices – Ethnicity

Menu: Utilities – Choices – Ethnicity

If it is required to classify patients by their ethnic origins click on the 'enter' icon (or <u>E</u>dit, <u>E</u>nter) 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 (or <u>E</u>dit, <u>U</u>pdate).

9.   Choices – Fax

Menu: Utilities – Choices – 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 (or <u>E</u>dit, <u>E</u>nter).

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.

10.   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 ▣ (or 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 ◀ (or **F6** and **F5**) to find the medical condition you wish to interrogate. Then click on the 'patients' icon 👤 (or 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 🖨 (or 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 ⌷ (or <u>F</u>ile, <u>P</u>rint) and select Mail Merge from the drop down menu.

Click on the word <u>T</u>his_view at the top of the screen to show those letters that can be sent from this screen.

Highlight the appropriate letter and click on <u>R</u>un.
A message will appear informing you how many letters will be produced.

Number of records to merge: 28

Ok   Cancel

Click on OK to continue or Cancel if you wish to abandon the mail merge.

Would you like to edit the document?

Yes   No

When you are asked if you would like to edit the document click on No to send the letter as it is. If there are changes you want to make then click on Yes.

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

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

11.   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 (or 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.

12.   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 (or 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.
	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.

13.   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 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 [icon] (or 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
Address	6 lines are available for the address of the purchaser
Phone/Fax	telephone and fax numbers 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.
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 printed. Entering **N** will prevent orders printing in batch or instant print (if switched on).

14.   Choices – Referrers

Menu: Utilities – Choices – Referrers

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

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.

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 (or 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.
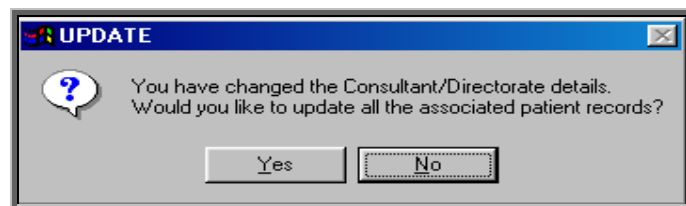
If you choose No, existing patients will continue to show the Referrer details as they were before they were edited.

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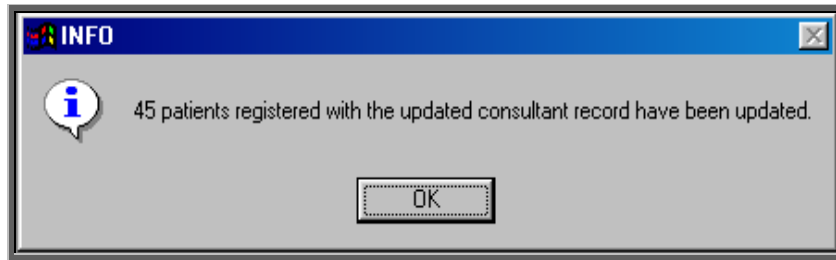
This task may take several minutes (depending how many patients you have) but will take less time if you are the only one logged into OPAS.

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.

15.   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 (or Edit, Enter)

Code   enter an appropriate code

Description   enter a description for the referral type

16.   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 (or **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 (often the only purchaser will be the Trust itself, which will be an internal purchaser). 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**
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 GRN's 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 13. Choices – Purchasers).

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

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)

Use Prescriptions   set to either Always or Never as required. If set to Always, for each order you enter you must select the relevant prescription

Prosthetics   if you are using OPAS for prosthetic patients enter Yes here to switch on the ability to add prosthetic referrals and quotations from the patient screen

'Windows' messages   normally set to Yes to show messages in the normal Windows style

Default   this allows you to set what option appears as the default for Yes-No and OK-Cancel prompts.
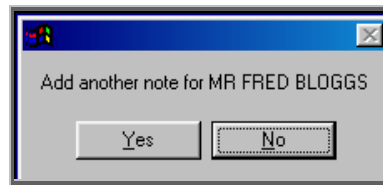
 If you set this to No (this is the normal setting), Yes-No prompts default to No and OK-Cancel prompts default to Cancel. If you set this to Yes, Yes-No prompts default to Yes and OK-Cancel prompts default to OK.
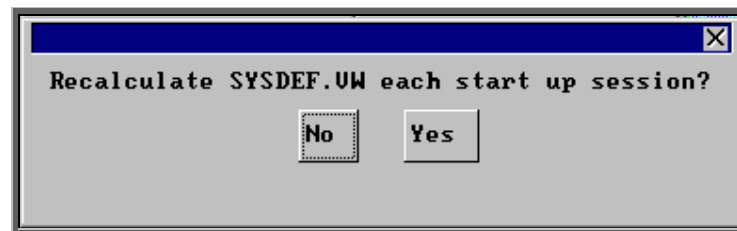
Dormant time   is the number of years without an order being placed after which a patient is declared as dormant and is moved to the dormant patients file using the dormant patients routine. Change this to the number of years that you wish to keep patients on the live system without an order being placed for that patient.

PAS link path   enter the path to the PAS link, if installed

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

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

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.

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.

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

'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.
Appointment time	is the default length of time in minutes for an appointment: it should show the most common length of appointments.
No of Transport Memos	enter the number of copies of transport memos required
Earliest/latest times with transport	enter the earliest and latest times for the morning and the afternoon that appointments that require transport can be offered.
Cancelled Appoints	once appointments are cancelled, this option decides whether t they are kept on the system and identified by being highlighted in red, or removed
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.
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 and Review appointments. Leave these blank for unlimited number of appointments.
Monitor messages	if this is set to Yes, you will be prompted when you have new messages (see Utilities – Note 22. Messages)

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.

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:

```
┌──────────────────────────────────────── ☒ ┐
│ Recalculate SYSDEF.UW each start up session? │
│                                              │
│        ┌────┐   ┌─────┐                      │
│        │ No │   │ Yes │                      │
│        └────┘   └─────┘                      │
└──────────────────────────────────────────────┘
```

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

17.   Choices – Titles

Menu: Utilities – Choices - 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.

18.   Choices – Transport

Menu: Utilities - Choices - 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 (or <u>E</u>dit, <u>E</u>nter).

19.   Choices – Wait Types

Menu: Utilities - Choices - 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 (or <u>E</u>dit, <u>E</u>nter).

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.

20.   Choices – Wards

Menu: **Utilities - Choices - Wards**

These appear in a pop-up menu on the **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 [icon] (or <u>E</u>dit, <u>E</u>nter), and type in the Ward name.
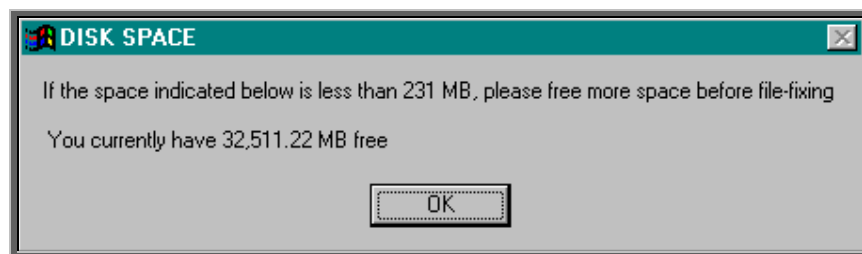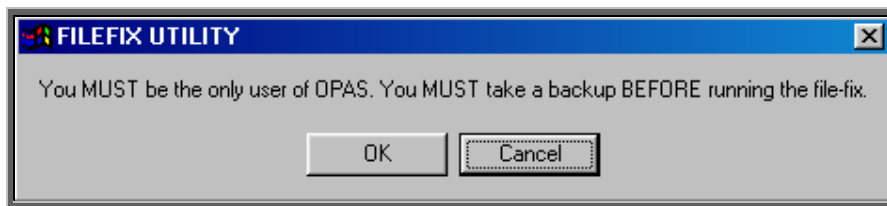
21.   File Fix

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

DISK SPACE

If the space indicated below is less than 231 MB, please free more space before file-fixing

You currently have 32,511.22 MB free

OK

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.
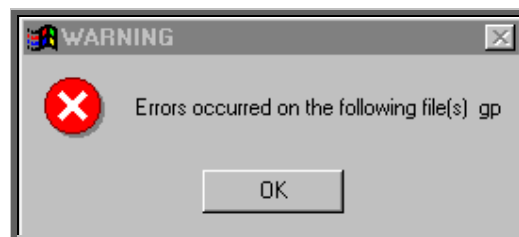
write down exactly what it says and contact the Support Helpdesk on 07041 471129. **DO NOT** use OPAS or let anyone else log on without speaking to someone on the Helpdesk.

22.   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
Pass for payment       1
Sage version        line50
```

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
```
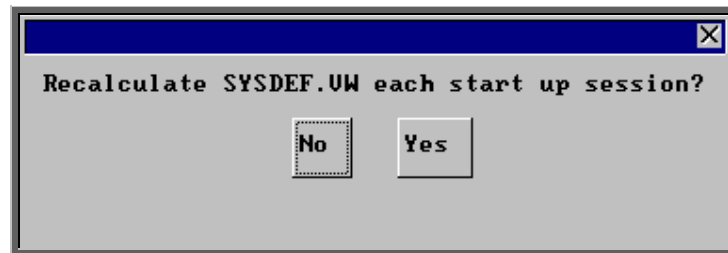
OPAS will check for new messages each time you return to a menu screen. When you have new messages the following prompt will appear.

```
MESSAGES
  You have received new mail.
  Would you like to go to your in-box now?

        Yes        No
```

You can choose to read the message straight away by clicking on Yes (or type Y).

If you click on No (or type N) you can go to your in-box at any time by selecting Utilities – Choices – Messages – Inbox.

b) Sending messages from the outbox

Menu: Utilities – Messages – Outbox.

Click on the 'enter' icon ▤ (<u>E</u>dit, <u>E</u>nter).

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 ▤ (or <u>M</u>essage).

```
ADD MESSAGE                              ✕

  Add message relating to: MR JAMES HERRIOT

        Yes            No
```

Click on Yes (or 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.
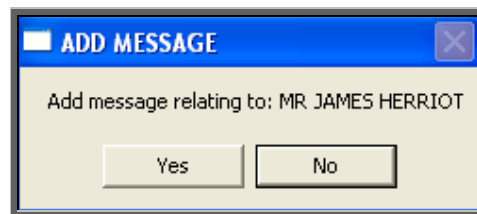
Message: enter your message here. There are nine lines available for your message.

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

d) Sending messages from the Order screen

Menu: History – Orders

Click on the 'messages' icon (or Message).

Click on Yes (or 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.
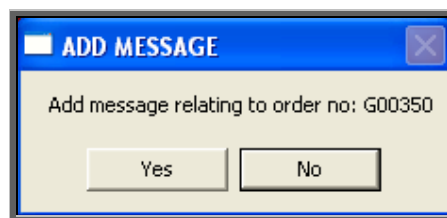
Message: enter your message here. There are nine lines available for your message.

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

e) 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 (or <u>G</u>oto, <u>P</u>atient).

- If order details have been completed, you can jump to the order by clicking on the 'order' icon (or <u>G</u>oto, <u>O</u>rder).

- If you wish to reply to the message, click on the 'enter' icon (or <u>R</u>eply).

- If you wish to remove the message from your inbox, click on the 'delete' icon (or <u>C</u>lear).   This will also delete the message from the senders outbox.

23.   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 ▤ (or <u>E</u>dit, <u>E</u>nter).

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 ▤ (or <u>E</u>dit, <u>U</u>pdate).

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 ▤ (or <u>E</u>dit, <u>E</u>nter).
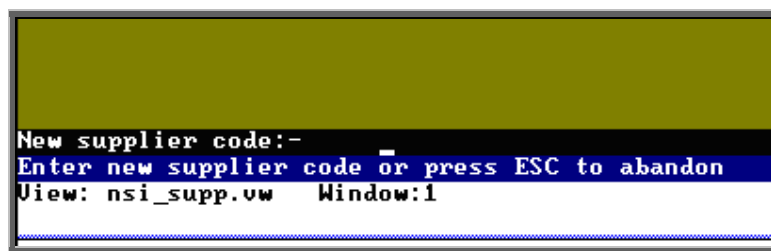
At the bottom left corner of the screen you will be asked for the new supplier code.

Enter your code here and press **Enter**. If the code is already in use you will be told.
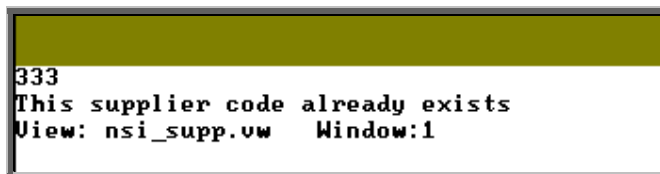
If the code is unique, you will be asked to confirm that you wish to continue.

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

Name   enter the full company name of the supplier

Shortname   enter an abbreviated name for the supplier (you will be able to search for suppliers in the pop up list by this Shortname)

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 [icon] (or 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 [icon] (or 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 (or <u>E</u>dit, <u>U</u>pdate).

24.   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 23. 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 (or <u>E</u>dit, <u>U</u>pdate).

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.
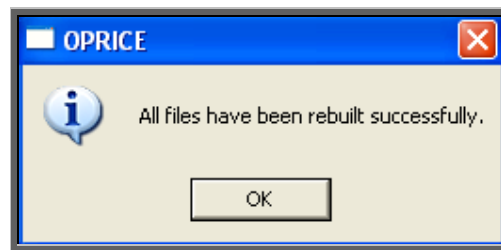
25.   Order numbers

Menu: Utilities - Order Numbers - Standard Formula

N.B. 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!

Menu: Utilities - Order Numbers - Portable Formula

N.B. 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.
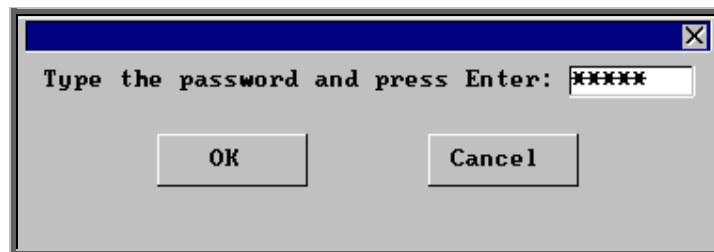

Do not make any changes unless you are confident about what you are doing!

26.   Password

Menu: Utilities – Password

Use this screen to change your password.

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

```
┌─────────────────────────────────────────────────────[X]─┐
│ Type the password and press Enter: *****                 │
│                                                          │
│        ┌──────────┐          ┌──────────┐                │
│        │    OK    │          │  Cancel  │                │
│        └──────────┘          └──────────┘                │
└──────────────────────────────────────────────────────────┘
```

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

```
┌──────────────────────────────────────┐
│ New Password                          │
└──────────────────────────────────────┘
```

You will then be asked to type in your <u>new</u> 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.
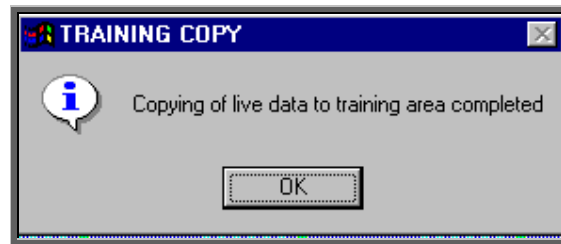
27.   Training

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.
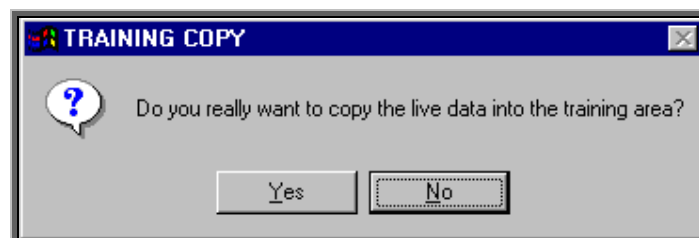
Click in Yes to continue, or No to abandon the option.

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.

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
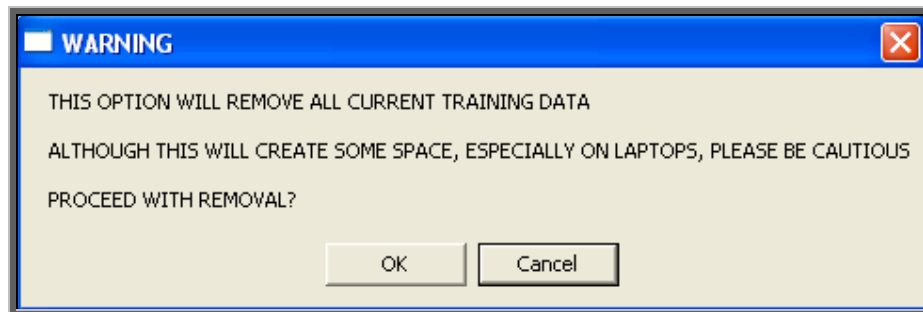
If you are in any doubt, please contact the OPAS Helpdesk before proceeding.
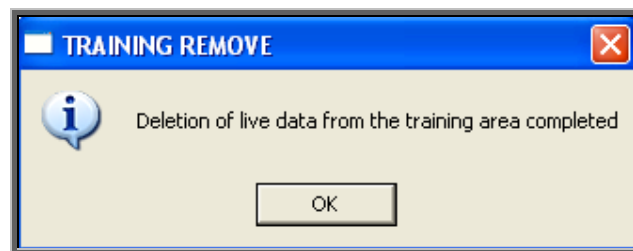
You will be notified once the training database has been deleted.

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.

28.   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.
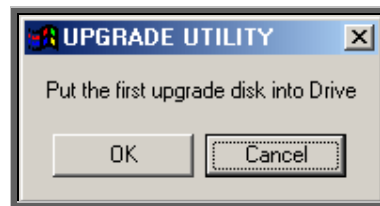
> We periodically send you upgrade disks to update
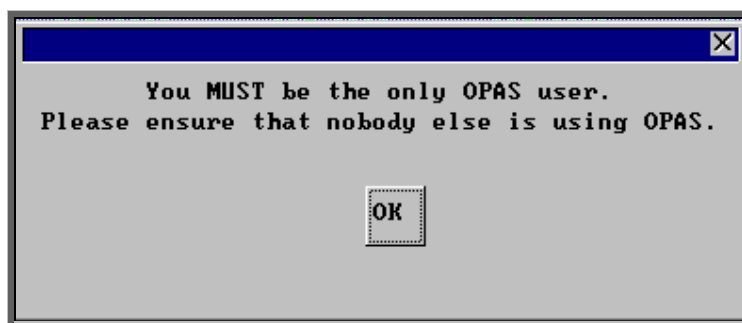
- prices

- 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).
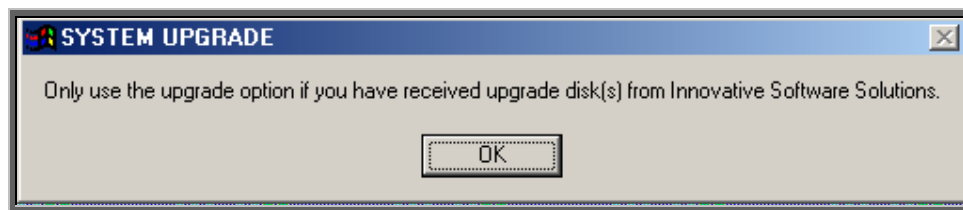
Click on OK

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.

29.   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 Edit and then select Enter.

User ID	enter the forename of the user e.g. Janet. There must be no spaces in the user name and it must be unique. Therefore if you have two Janets using OPAS one will have to be set up as their forename and initial of their surname e.g. Janetp or perhaps an abbreviation of their name e.g. Jan
Password	enter the forename of the user in CAPITAL letters e.g. JANET. There must be no spaces in the password.
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
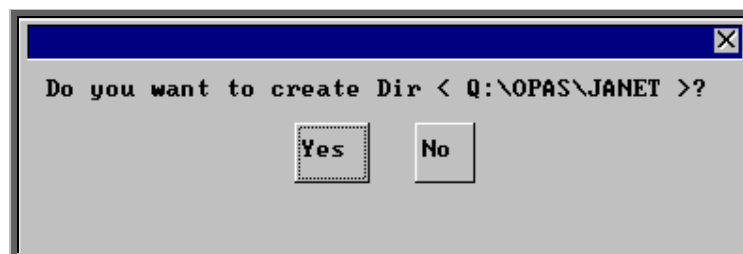
You will be asked if you want to create the new directory and you should click on Yes (or type Y).

Any of the fields can be changed later by clicking on <u>E</u>dit and selecting <u>U</u>pdate.
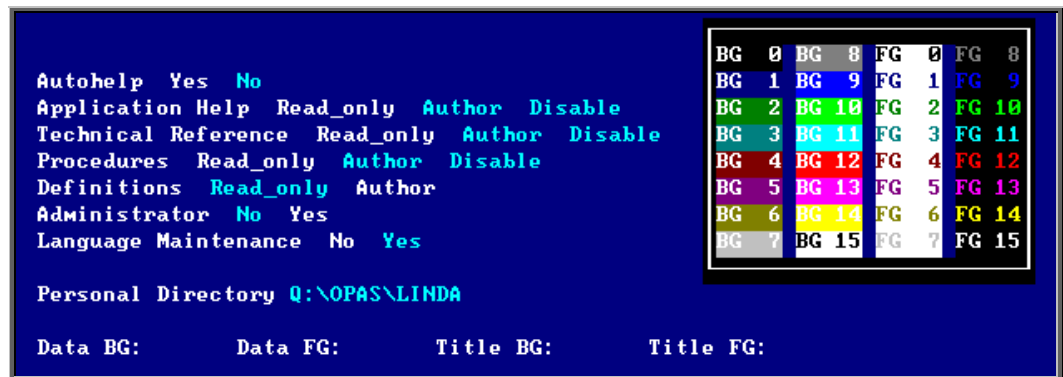
Once a user id has been created, they have the ability to choose the colour of their screen. The colour scheme chosen, however, will take effect on all key screens i.e. patient, order, invoice, stock, appointment screens. The colour scheme selected will only affect the user it is applied to, so in theory 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 [>] (or **F6** key). Click on the

'update' icon (or <u>E</u>dit, <u>U</u>pdate) and move down to the *Data BG:* field at the bottom of the screen.

```
Autohelp  Yes  No
Application Help  Read_only  Author  Disable
Technical Reference  Read_only  Author  Disable
Procedures  Read_only  Author  Disable
Definitions  Read_only  Author
Administrator  No  Yes
Language Maintenance  No  Yes

Personal Directory Q:\OPAS\LINDA

Data BG:        Data FG:        Title BG:        Title FG:
```

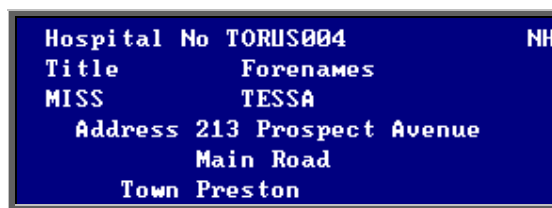| BG | 0 | BG | 8 | FG | 0 | FG | 8 |
BG	1	BG	9	FG	1	FG	9
BG	2	BG	10	FG	2	FG	10
BG	3	BG	11	FG	3	FG	11
BG	4	BG	12	FG	4	FG	12
BG	5	BG	13	FG	5	FG	13
BG	6	BG	14	FG	6	FG	14
BG	7	BG	15	FG	7	FG	15

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.

<u>Example 1</u>

```
Data BG: 1        Data FG: 15        Title BG: 1        Title FG: 15
```

will give you

```
Hospital No TORUS004                 NH
Title          Forenames
MISS           TESSA
   Address 213 Prospect Avenue
           Main Road
      Town Preston
```

Example 2

Data BG: 1   Data FG: 15   Title BG: 3   Title FG: 15

will give you

Hospital No TORUS004
Title   Forenames
MISS   TESSA
   Address 213 Prospect Avenue
           Main Road
      Town Preston

Example 3

Data BG: 1   Data FG: 15   Title BG: 3   Title FG: 0

will give you

Hospital No TORUS004
Title   Forenames
MISS   TESSA
   Address 213 Prospect Avenue
           Main Road
      Town Preston
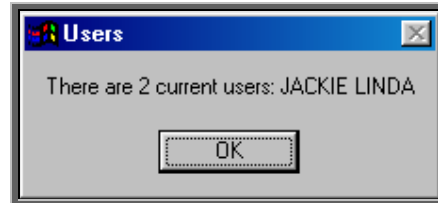
At any time you can revert back to OPAS standard colours by leaving the four colour fields blank.

Data BG: Data FG: Title BG: Title FG:

57.   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.