

Reports

- 1. Introduction**
- 2. Appointments Reports (Ad hoc)**
- 3. Appointments Reports (Batches)**
- 4. Batched Appointment report – Bookings**
- 5. Batched Appointment report – New Patients**
- 6. Batched Appointment report – No Outcome**
- 7. Batched Appointment report – Patient Charter Stats**
- 8. Batched Appointment report – PCT**
- 9. Batched Appointment report – Reviews**
- 10. Batched Appointment report – Sessions**
- 11. Batched Appointment report – Transport**
- 12. Batched Appointment report – Uncollected**
- 13. Appointments Reports (Summaries)**
- 14. Summary Appointment report – Clinician**
- 15. Summary Appointment report – Directorate**
- 16. Summary Appointment report – GP Activity**
- 17. Summary Appointment report – PCT**

- 18. Summary Appointment report – Referrer**
- 19. Summary Appointment report – Venues**
- 20. Care Episode (Batches)**
- 21. Care Episode – Analysis**
- 22. Care Episode – Current**
- 23. Financial Reports (Ad hoc)**
- 24. Financial Reports (Batches)**
- 25. Financial report – Activity**
- 26. Financial report – Clinician**
- 27. Financial report – Clinics**
- 28. Financial report – Cost Code**
- 29. Financial report – Creditors**
- 30. Financial report – Debtors**
- 31. Financial report – Directorate**
- 32. Financial report – Emailed**
- 33. Financial report – GPs**
- 34. Financial report – Graphs**
- 35. Financial report – Invoices**

- 36. Financial report – Orders**
- 37. Financial report – Payments**
- 38. Financial report – Profit**
- 39. Financial report – Progress**
- 40. Financial report – Purchases**
- 41. Financial report – Quarterly**
- 42. Financial report – Received**
- 43. Financial report – Reclaim VAT**
- 44. Financial report – Referrers**
- 45. Financial report – Returns**
- 46. Financial report – Schedules**
- 47. Financial report – Statements**
- 48. Financial report – Supplier Spend**
- 49. Financial report – Wards**
- 50. Financial report – Workshop**
- 51. Financial report – YTD (Year to Date)**
- 52. Patients Reports (Batches)**
- 53. Patients report – Amputee**
- 54. Patients report – Conditions**

- 55. Patients report – Ethnicity**
- 56. Patients report – Registered**
- 57. Patients report – Reviews**
- 58. Patients report – Services**
- 59. Prescriptions Reports (Batches)**
- 60. Prescriptions report – Charges**
- 61. Prescriptions report – Expired**
- 62. Prescriptions report – New**
- 63. Stock Control (Batches)**
- 64. Stock Control – Creditors**
- 65. Stock Control – Lowstock**
- 66. Stock Control – Progress**
- 67. Stock Control – Spend**
- 68. Waiting List (Batches)**
- 69. Waiting List – Archived**
- 70. Waiting List – Current**

1. Introduction

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

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

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

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

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

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

2. Appointment Reports (Ad Hoc)

Menu: Reports – Appointments – Ad hoc or

Menu: Appointments – Print – Reports – Ad hoc

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

OPAS Appointment Reports Selection Criteria Screen

Appointments **Archived** **Current**

Venue All One

Outcome All One

Dates All Range

Continue? No Yes

Appointments

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

Select Current if the appointments you wish to analyse are current

Venue

Select All if all Venues are to be included

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

Outcome

Select All if all Outcomes are to be included

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

Dates

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

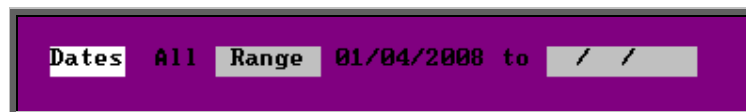
Select Range if you want to report on a range of dates (this is the usual practice e.g. a month, quarter or year). Use the space bar on your keyboard to move the highlight from **All** to **Range** and press **Enter**.

Type the start date in the space provided in the format DD MM YYYY and press **Enter**.



A screenshot of a software menu titled 'Dates'. It contains two options: 'All' and 'Range'. The 'Range' option is currently highlighted with a white background, while 'All' has a grey background. To the right of the options is a text input field containing two slashes '/' and a cursor.

Now type in the end date in the next space in the format DD MM YYYY and press **Enter**.

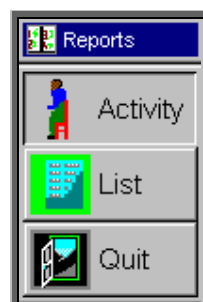


A screenshot of the 'Dates' menu. 'Range' is selected. The input field now shows '01/04/2008 to' followed by another input field containing two slashes '/' and a cursor.

Continue

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

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



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

Activity

The **Activity** report can show for each venue what type of appointment were seen and the outcomes for those appointments



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

Screen

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

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

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

Printer

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

Below is an example of the **Activity** report.

Appointment Activity Report									
	Total	New	Supply	Fit	Review	Cast	Other	Attended	DNA
Orthotic Clinic	789	57	7	85	7	4	629	461	30
New Clinic	36	4			2		30	27	4
Test	7						7	6	1
A N Other Clinic	5				1		4	1	1
Diabetic Foot Clinic	3						3	1	1

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

List

The **List** report will show all the appointments that matched the criteria and include arrived and seen times. This report will only work if archived appointments are being analysed.



You will be shown how many appointments OPAS has found and ask if you want to see the information in **Detail** i.e. a line for each order or just **Totals-only**



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

Screen

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

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

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

Printer

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

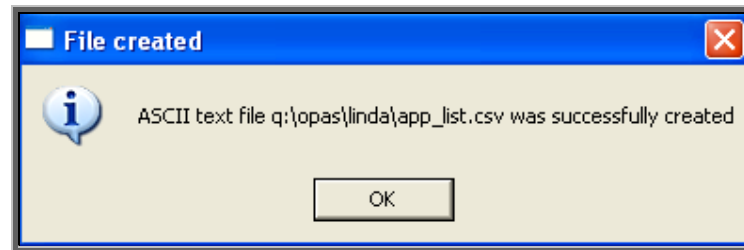
Below is an example of the **List** report in **Detail**.

Clinic	Patient	Date	Time	Arrived	Seen
Orthotic Clinic	NG1010589	01/ 05/ 2003	09: 15: 00		
Orthotic Clinic	NG0324777	13/ 05/ 2002	09: 15: 00		
Orthotic Clinic	NTCRUS007	29/ 02/ 2000	09: 15: 00	09: 15: 00	10: 05: 00
Orthotic Clinic	NTCRUS009	14/ 02/ 2008	09: 15: 00		
Orthotic Clinic	NLKP12345	04/ 11/ 1999	09: 15: 00	09: 00: 00	10: 25: 00
Orthotic Clinic	NAB123456	25/ 03/ 2008	09: 15: 00		
Orthotic Clinic	NG3350674	26/ 02/ 2001	09: 15: 00	09: 10: 00	09: 20: 00

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

File

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



3. Appointments Reports (Batches)

Menu: Reports – Appointments – Batches or

Menu: Appointments – Print – Reports – Batches

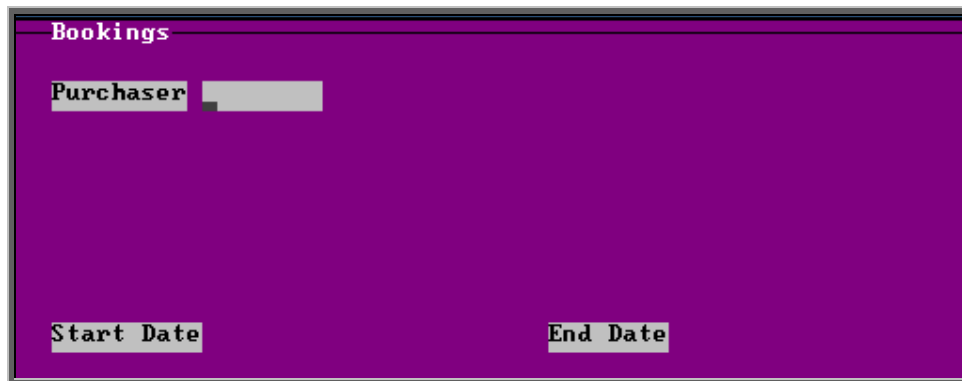
All the batch appointment reports (except the **No Outcome** and **Transport** report) work on archived information, so ensure the appointments for the period you wish to report on has been archived ([see Appointments - Note 21. Archiving sessions](#)).

4. Batches – Bookings

This report interrogates the information entered in the booking fields.

Menu: Reports – Appointments – Batches – Bookings or

Menu: Appointments – Print – Reports – Batches – Bookings



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



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

Screen

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

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

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

Printer

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

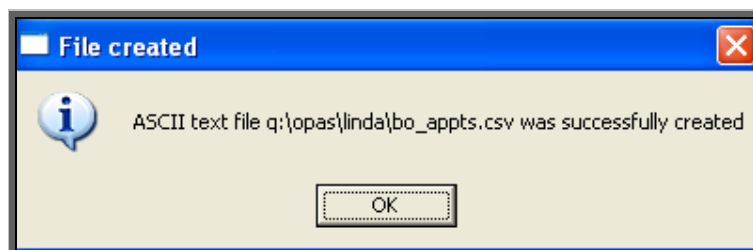
Below is an example of the **Bookings** report.

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

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

File

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

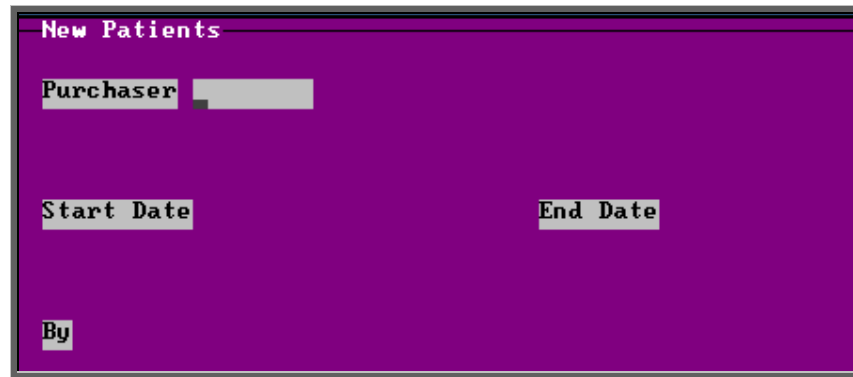


5. Batches – New Patients

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

Menu: Reports – Appointments – Batches – New Patients or

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



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



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

Screen

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

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

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

Printer

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

Below is an example of the **New Patients** report selecting **Directorate**.

New Patient Appointments by Directorate 01/ 01/ 2000 - 04/ 07/ 2008							
Directorate	Total	Attended OP	Attended IP	Attended Other	DNA OP	DNA IP	DNA Other
General	2	1					
PCT	51	25		1	4		
Trauma & Orthopaedic	1	1					

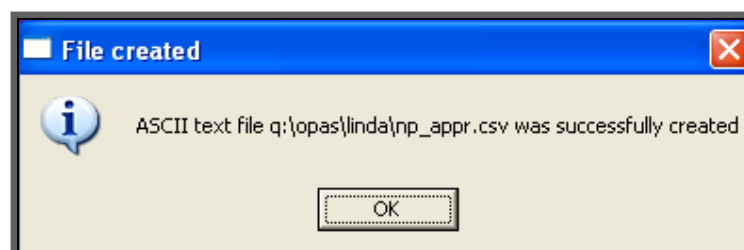
The report layouts (np_apptc/d/r/v.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

np_appc.csv	if clinician is selected
np_appd.csv	if directorate is selected
np_appr.csv	if referrer is selected
np_appv.csv	if venue is selected

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



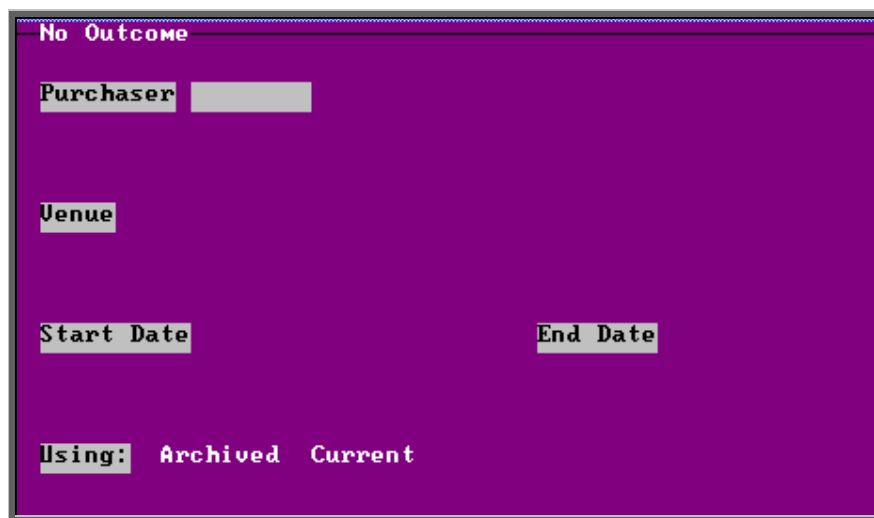
6. Batches – No Outcome

This report will show which appointments have had no outcome recorded.

The report can be used for either **current** or **archived** appointments.

Menu: Reports – Appointments – Batches – No Outcome or

Menu: Appointments – Print – Reports – Batches – No Outcome



No Outcome

Purchaser

Venue

Start Date End Date

Using: ☐ Archived ☐ Current

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the Venue required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY
- select whether the report period is for Archived or Current appointments



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

Screen

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

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

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

Printer

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

Below is an example of the **No Outcome** report.

Appointments without Outcomes			
Session	Date	Time:	Patient
2846	29/ 11/ 2007	11:20	NG0825852
2846	29/ 11/ 2007	11:40	NG8904425
2846	29/ 11/ 2007	15:00	NG8404152
2846	29/ 11/ 2007	14:30	NG0606286
2846	29/ 11/ 2007	14:15	NG0819725
2846	29/ 11/ 2007	14:50	NG0606286

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

File

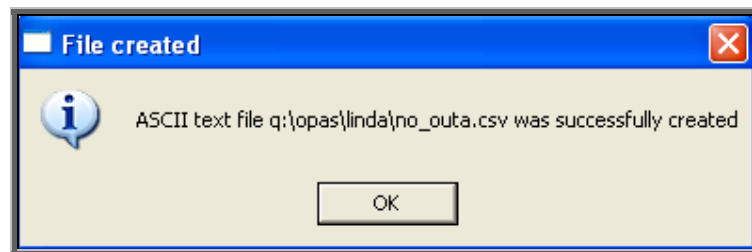
A comma separated variable file will be created called

no_outa.csv

if run for archived appointments

no_outc.csv if run for current appointments

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



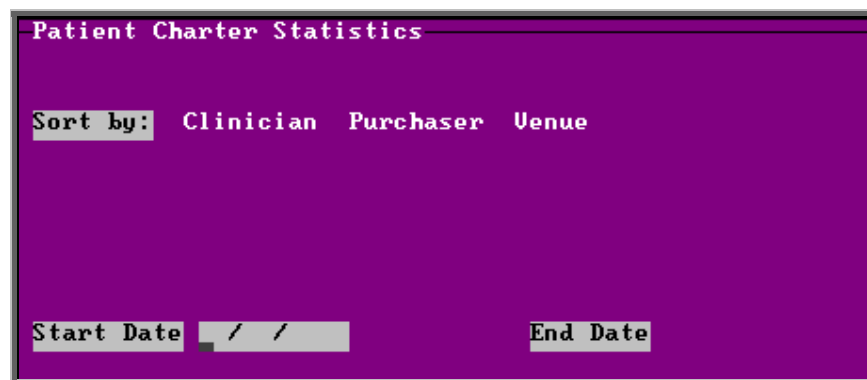
7. Batches – Patient Charter Stats

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

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

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

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



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



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

Screen

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

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

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

Printer

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

Below is an example of the **Patient Charter Stats** report selecting Clinician.

Patient Charter Statistics By Clinician 01/01/2000 - 04/07/2008					
Clinician	Under 30	Under 60	Over 60	Late	Rejects
Mrs Orthotiste	8	6	5	12	96
Mr Orthotist	50	42	32	54	328
Ivor Ninkling	1	3		2	19
Andy Pandy					8
Willie Gofar					4
Euan Husami					1
Mr B Fitter	1		2	1	2
A N Other					1
Ben Dover	2				5
Total	62	51	39	74	454

Number of patients seen within 30 minutes of their appointment time

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

Number of patients seen after 1 hour of their appointment time

Number of patients who arrived late for their appointment

Those appointments that do not have 'seen' times logged

File

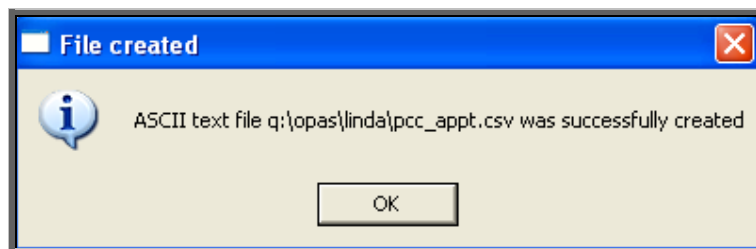
A comma separated variable file will be created called

pcc_appt.csv if clinician is selected

pcp_appt.csv if purchaser is selected

pcv_appt.csv if venue is selected

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



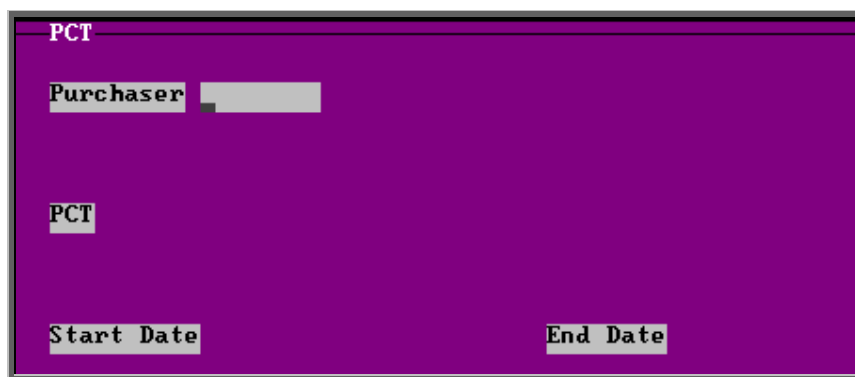
8. Batches – PCT

This report will provide a breakdown of PCT activity. An appointment report providing a summary of PCT activity is available in **Reports – Appointments – Summaries**.

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

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

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



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



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

Screen

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

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

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

Printer

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

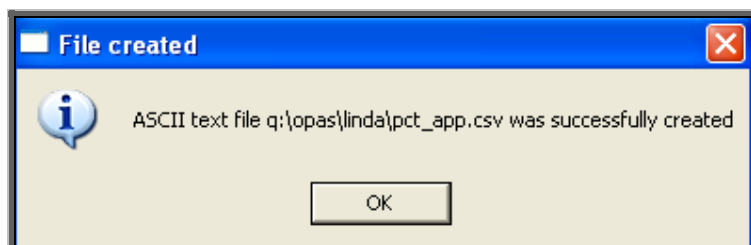
Below is an example of the PCT report.

PCT Appointment Activity 01/01/2007 - 30/11/2007								
NHS No	Hospital No	Practice	PCT	Appt Date	Type	Consultant	Orthotist	Purchaser
	NIMF000010	J82199	SFE Count 1	15/02/2007	F	Mr Surgeon	Mr Orthotist	GP Fundholder
601-234-5674	TORUS44	L81045	SFL	08/10/2007	N	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	SFL	15/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	SFL	15/02/2007		Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	SFL	19/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
601-234-5674	TORUS44	L81045	SFL Count 5	12/04/2007		Mr Surgeon	Mr Orthotist	NHS TRUST
623-456-7894	N12345QWERTY	P92017	SHG	20/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST
623-456-7894	N12345QWERTY	P92017	SHG	15/02/2007	F	Mr Surgeon	Mr Orthotist	NHS TRUST

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

File

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



9. Batches – Reviews

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

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

Menu: Reports – Appointments – Batches – Reviews or

Menu: Appointments – Print – Reports – Batches – Reviews

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

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

Screen

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

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

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

Printer

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

Below is an example of the **Review** report selecting Directorate.

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

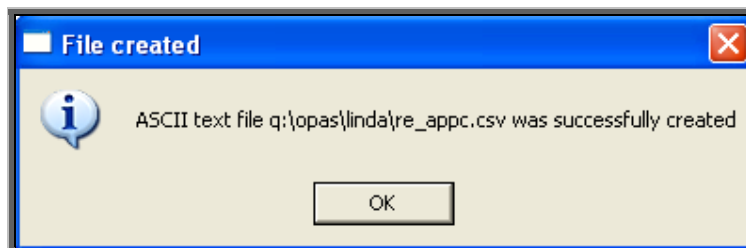
The report layouts (re_apptc/d/r/v.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

re_appc.csv	if run by clinician	re_appr.csv	if run by referrer
re_appd.csv	if run by directorate	re_appv.csv	if run by venue

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



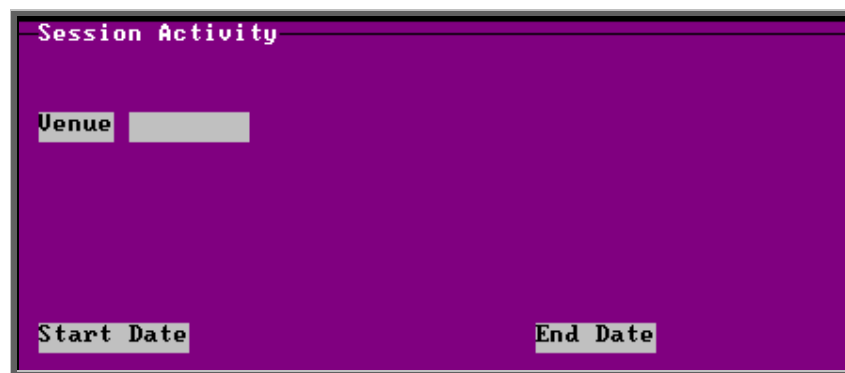
10. Batches – Sessions

This report will provide a breakdown of session activity (This replaces the session report that used to be within the adhoc menu).

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

Menu: Reports – Appointments – Batches – Sessions or

Menu: Appointments – Print – Reports – Batches – Sessions



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



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

Screen

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

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

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

Printer

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

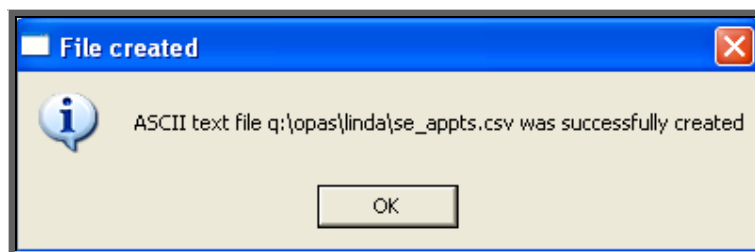
Below is an example of the **Session** report.

Sessions Report All Venues 01/01/2007 - 01/12/2007							
Venue	Monday	Tuesday	Wednesday	Thursday	Friday	Weekend	All
Appliance Department MARTINS NOT SO SPECIAL CLINIC	56	88 1	14 1	43	13		214 2
Grand Total	56	89	15	43	13	0	216

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

File

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

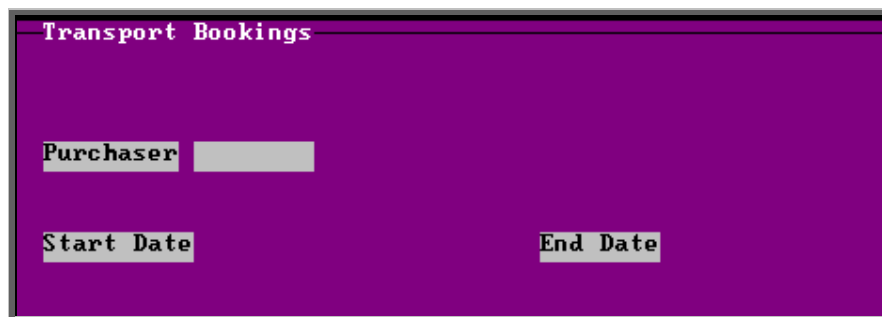


11. Batches – Transport

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

Menu: Reports – Appointments – Batches – Transport or

Menu: Appointments – Print – Reports – Batches – Transport



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



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

Screen

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

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

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

Printer

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

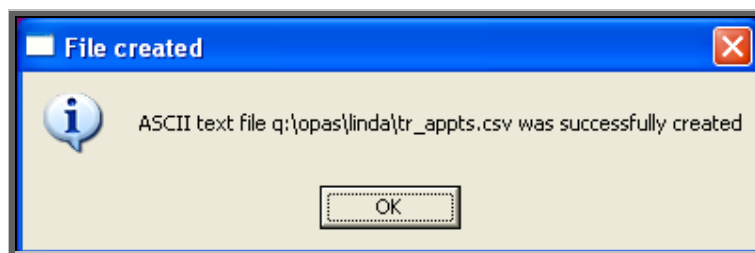
Below is an example of the **Transport** report.

Transport Bookings 1/ 9/ 2003 - 30/ 9/ 2003					
Clinic	Date	Time	Patient	Booked:	By
Appliance Department	29/ 09/ 2003	10:15:00	TEVP000010	25/ 09/ 2003	LINDA

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

File

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

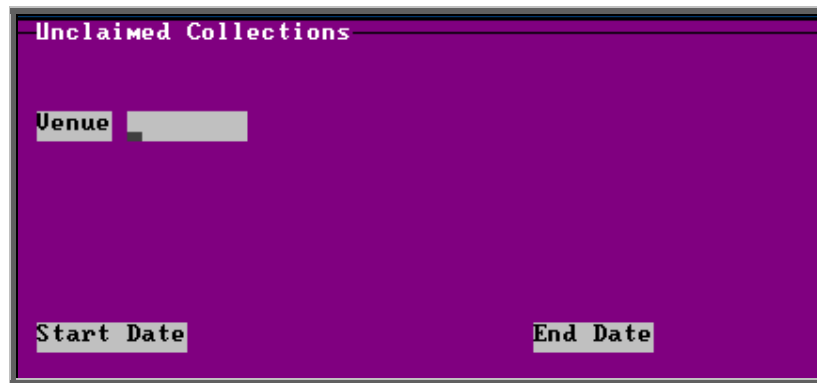


12. Batches – Uncollected

This report has two functions. Firstly it will report on those orders where the goods have not been collected, and then secondly, give you the option to send a reminder collection letter to those patients. OPAS determines which orders have not been collected by looking for orders where the ACO field is C and where the goods have been delivered but not yet supplied.

Menu: Reports – Appointments – Batches – Uncollected or

Menu: Appointments – Print – Reports – Batches – Uncollected



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



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

Screen

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

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

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

Printer

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

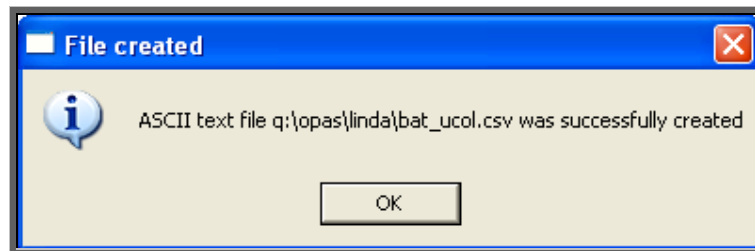
Below is an example of the **Uncollected** report.

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

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

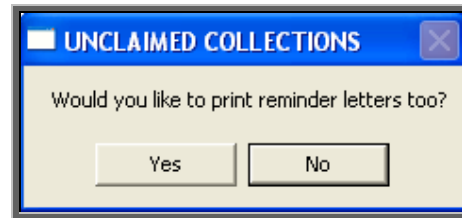
File

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



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

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



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

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

13. Appointments Reports (Summaries)

All these batch summary appointment reports work on archived information, so ensure the appointments for the period you wish to report on has been archived ([see Appointments – Note 21. Archiving sessions](#)). The summary reports can be run to analyse appointment type or appointment outcome.

14. Summaries – Clinician

Menu: Reports – Appointments – Summaries – Clinician or

Menu: Appointments – Print – Reports – Summaries – Clinician

Clinician Activity Summary

Purchaser

Clinician

Venue

Start Date **End Date**

Output: **Outcome** **Type**

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- select a **Clinician** from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Clinician** field empty will result in all clinicians being selected
- select a **Venue** from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Venue** field empty will result in all venues being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select whether the report should analyse by **Outcome** or **Type**



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

Screen

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

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

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

Printer

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

Below is an example of the **Clinician** report selecting **Outcome**.

New NHS Trust				Key :		0 - No Outcome recorded						
Clinician Appointment Activity						1 - Attended						
ALL PURCHASERS						2 - Did not Attend						
ALL VENUES						3 - Could Not Attend						
Start Date: 01/01/2000						4 - Collect Only						
End Date: 04/07/2008						5 - Cancelled by Hospital						
						6 -						
Clinician	Total	Time	%age	0	1	2	3	4	5	6	Collect	
Ben Dover	8	225	2.2%		8							
Mr B Fitter	5	180	1.8%		5							
Willie Gofar	4	60	0.6%		4							
Euan Husami	1	15	0.1%		1							
Ivor Ninkling	24	355	3.5%	9	14				1			
Mr Orthotist	551	7240	72.3%	136	312	24	42		37		28	
Mrs Orthotist	129	1800	18.0%	45	63	9	2		10		23	
A N Other	1	15	0.1%		1							
Andy Pandey	8	120	1.2%		7	1					1	
Grand Total	731	10010		190	415	34	44	0	48	0	52	
Count 9												

Below is an example of the **Clinician** report selecting **Type**

Clinician Appointment Activity											
ALL PURCHASERS											
ALL VENUES											
Start Date: 01/01/2000											
End Date: 04/07/2008											
Clinician	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
Ben Dover	8	225	2.2%						5	2	1
Mr B Fitter	5	180	1.8%	1					4		
Willie Gofar	4	60	0.6%	1					3		
Euan Husami	1	15	0.1%						1		
Ivor Ninkling	24	355	3.5%	2		4			17	1	
Mr Orthotist	551	7240	72.3%	39	9	72	8	2	412	32	5
Mrs Orthotiste	129	1800	18.0%	19	1	8		2	117	5	
A N Other	1	15	0.1%						1		
Andy Pandey	8	120	1.2%			1			8		
Grand Total	731	10010		62	10	85	8	4	568	40	6
Count 9											

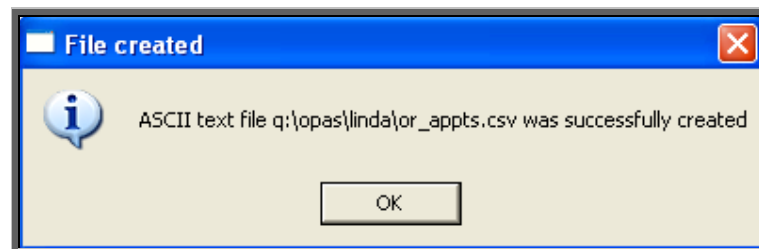
File

A comma separated variable file will be created called

or_appts.csv if analysed by outcome

ot_appts.csv if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



15. Summaries – Directorate

Menu: Reports – Appointments – Summaries – Directorate or

Menu: Appointments – Print – Reports – Summaries – Directorate

Directorate Activity Summary

Purchaser []

Directorate: []

Venue []

Start Date [] **End Date** []

Output: Outcome Type

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select a Directorate from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Directorate field empty will result in all directorates being selected
- select a Venue from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY
- select whether the report should analyse by Outcome or Type

Print 5 records

Screen Printer File

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

Screen

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

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

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

Printer

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

Below is an example of the Directorate report selecting Outcome.

New User: NHS Trust Directorate Appointment Activity ALL PURCHASERS Start Date: 01/01/2001 End Date: 30/07/2003				Key :		0 - No Outcome recorded 1 - Attended 2 - Did not Attend 3 - Could Not Attend 4 - Collect Only 5 - Cancelled by Hospital 6 -					
Directorate	Total	Time	%age	0	1	2	3	4	5	6	Collect
Paediatrics	5	75	2.6%		3	2					1
PCT	3	40	1.4%		3						
Trauma & Orthopaedic	169	2775	96.0%		165	3	1				5
Grand Total	177	2890		0	171	5	1	0	0	0	6
Count 3											

Below is an example of the Directorate report selecting Type

Directorate Appointment Activity ALL PURCHASERS ALL VENUES Start Date: 01/01/2000 End Date: 04/07/2008											
Directorate	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
General	62	655	6.5%	2	2	1	1	1	79		2
PCT	22	295	2.9%	3	2	7	3		8		
Trauma & Orthopaedic	635	8835	88.3%	56	6	74	3	3	474	40	4
	12	225	2.2%	1		3	1		7		
Grand Total	731	10010		62	10	85	8	4	568	40	6
Count 4											

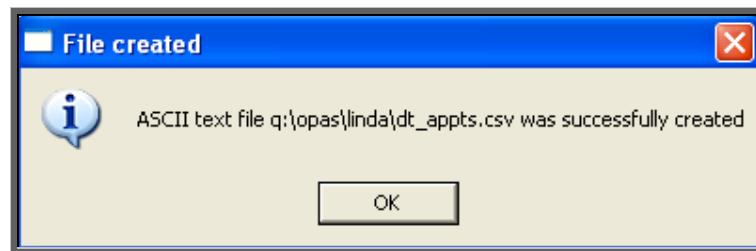
File

A comma separated variable file will be created called

di_appts.csv if analysed by outcome

dt_appts.csv if analysed by type

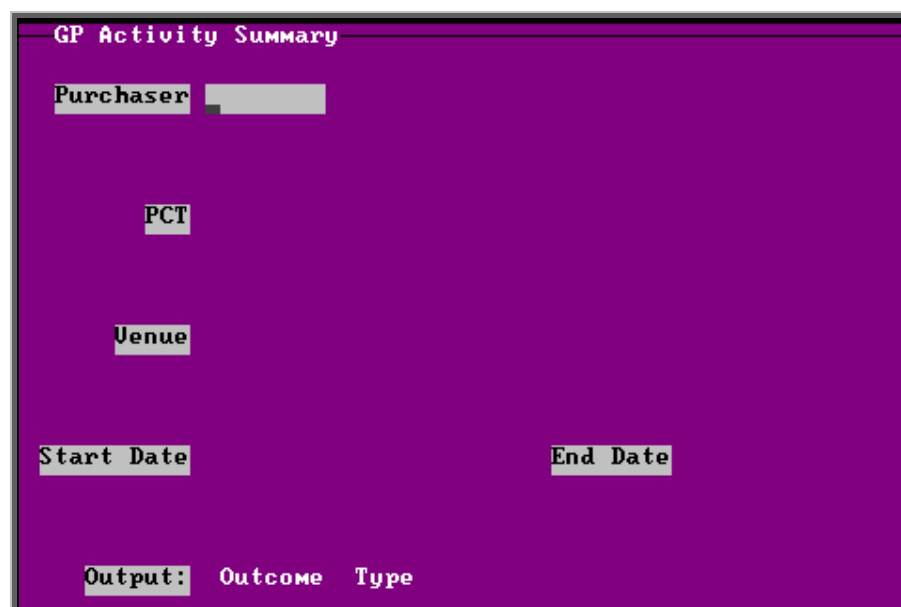
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



16. Summaries – GP Activity

Menu: Reports – Appointments – Summaries – GP Activity or

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



GP Activity Summary

Purchaser []

PCT []

Venue []

Start Date [] End Date []

Output: Outcome Type

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the **PCT** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected
- select the **Venue** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select whether the report should analyse by **Outcome** or **Type**



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

Screen

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

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

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

Printer

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

Below is an example of the GP Activity report selecting Outcome.

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

Below is an example of the GP Activity report selecting Type

New NHS Trust GP Appointment Activity ALL PURCHASERS ALL PCTS ALL VENUES Start Date : 01/01/2000 End Date : 04/07/2008											
GP Ref	Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward	Walkins
G0102005 ALLEN EB	241	3635	36.3%	22	5	15	3	2	208		6
G0102926 ANDERSON MG	1	15	0.1%						4		
G0107725 ALEXANDER PJ	2	30	0.3%			1			1		
G0110134 ALLEN JP	8	30	0.3%						6	2	
G0110134 ALLEN JP	1	15	0.1%						1		
G0218816 BROOKES M	2	45	0.4%	1		1			4		
G0230753 BENNET RB	2	15	0.1%						2		

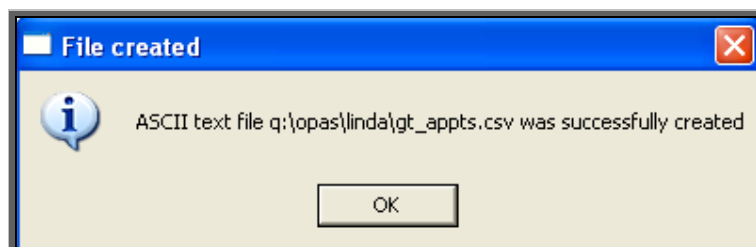
File

A comma separated variable file will be created called

gp_appts.csv if analysed by outcome

gt_appts.csv if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



17. Summaries – PCT

Menu: Reports – Appointments – Summaries – PCT or

Menu: Appointments – Print – Reports – Summaries – PCT

The screenshot shows a software window titled "PCT Summary". Inside the window, there are several input fields arranged vertically: "Purchaser" with a dropdown arrow, "PCT" with a dropdown arrow, "Venue" with a dropdown arrow, "Start Date" and "End Date" both with dropdown arrows, and an "Output:" section with two radio buttons labeled "Outcome" and "Type".

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the **PCT** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected
- select the **Venue** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select whether the report should analyse by **Outcome** or **Type**



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

Screen

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

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

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

Printer

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

Below is an example of the PCT report selecting Outcome.

New NHS Trust				Key: 0 - No Outcome recorded							
PCT Appointment Activity				1 - Attended							
ALL PURCHASERS				2 - Did not Attend							
ALL PCTS				3 - Could Not Attend							
ALL VENUES				4 - Collect Only							
Start Date: 01/01/2000				5 - Cancelled by Hospital							
End Date: 04/07/2008				6 -							
PCT	Total	Time	%ge	0	1	2	3	4	5	6	Collect
5A8 GREENWICH TEACHING PCT	280	4045	40.4%	79	161	12	13		15		23
5EM NOTTINGHAM CITY PCT	2	15	0.1%	2							1
5FE PORTSMOUTH CITY TEACHING PCT	1	15	0.1%	1							1
5FL BATH AND NORTH EAST SOMERSET PCT	35	650	6.5%	11	15	3	3		3		

Below is an example of the PCT report selecting Type

New NHS Trust											
PCT Appointment Activity											
ALL PURCHASERS											
ALL VENUES											
Start Date: 01/01/2000											
End Date: 04/07/2008											
PCT		Total	Time	%age	New	Review	Fit	Supply	Cast	Other	Ward
5A8 GREENWICH TEACHING PCT		280	4045	40.4%	25	5	16	4	2	242	3
5EM NOTTINGHAM CITY PCT		2	15	0.1%	1		1			1	
5FE PORTSMOUTH CITY TEACHING PCT		1	15	0.1%			1			1	
5FL BATH AND NORTH EAST SOMERSET		35	650	6.5%	7		4			23	1

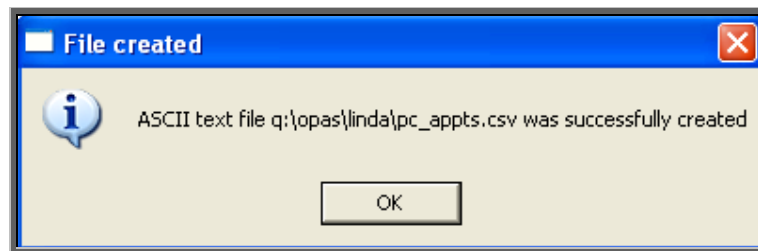
File

A comma separated variable file will be created called

pc_appts.csv if analysed by outcome

pt_appts.csv if analysed by type

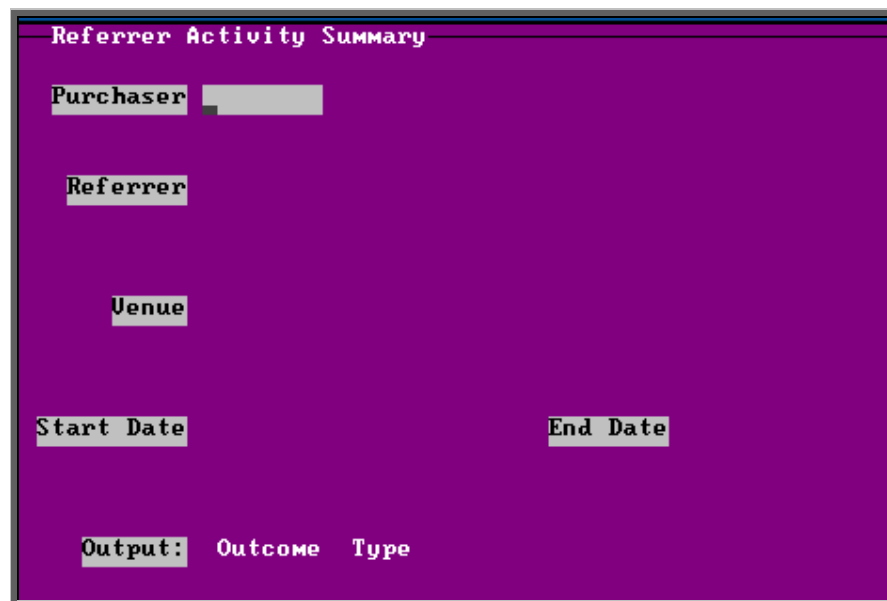
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



18. Summaries – Referrer

Menu: Reports – Appointments – Summaries – Referrers or

Menu: Appointments – Print – Reports – Summaries – Referrers



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



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

Screen

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

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

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

Printer

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

Below is an example of the **Referrer** report selecting **Outcome**.

New NHS Trust				Key: 0 - No Outcome recorded					
Referrer Appointment Activity				1 - Attended					
ALL PURCHASERS				2 - Did not Attend					
ALL VENUES				3 - Could Not Attend					
Start Date: 01/01/2000				4 - Collect Only					
End Date: 04/07/2008				5 - Cancelled by Hospital					
				6 -					
Referrer	Total	Time	%age	0	1	2	3	4	5
	60	640	6.4%	34	5	9	5		7
A N Other	29	430	4.3%	19	5	3	1		1
Direct Access GP	15	225	2.2%	11	3	1			
Mr Bloggs	2	15	0.1%	1					1
Mr N Parrish	4	40	0.4%		3		1		
mr smith	5	90	0.9%		5				
Mr Surgeon	616	8570	85.6%	125	394	21	37		39
Grand Total	731	10010		190	415	34	44	0	48
Count 7									

Below is an example of the **Referrer** report selecting **Type**

New NHS Trust								
Referrer Appointment Activity								
ALL PURCHASERS								
ALL VENUES								
Start Date: 01/01/2000								
End Date: 04/07/2008								
Referrer	Total	Time	%age	New	Review	Fit	Supply	Cast
	60	640	6.4%	1	2	1	1	1
A N Other	29	430	4.3%	3	2	10	4	
Direct Access GP	15	225	2.2%	2	2	4		
Mr Bloggs	2	15	0.1%	1				
Mr N Parrish	4	40	0.4%					
mr smith	5	90	0.9%	1				
Mr Surgeon	616	8570	85.6%	54	4	70	3	3
Grand Total	731	10010		62	10	85	8	4
Count 7								

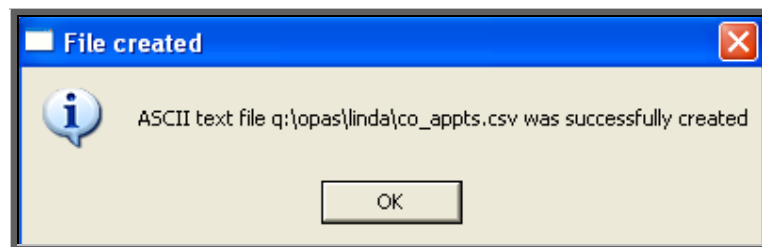
File

A comma separated variable file will be created called

co_appts.csv if analysed by outcome

ct_appts.csv if analysed by type

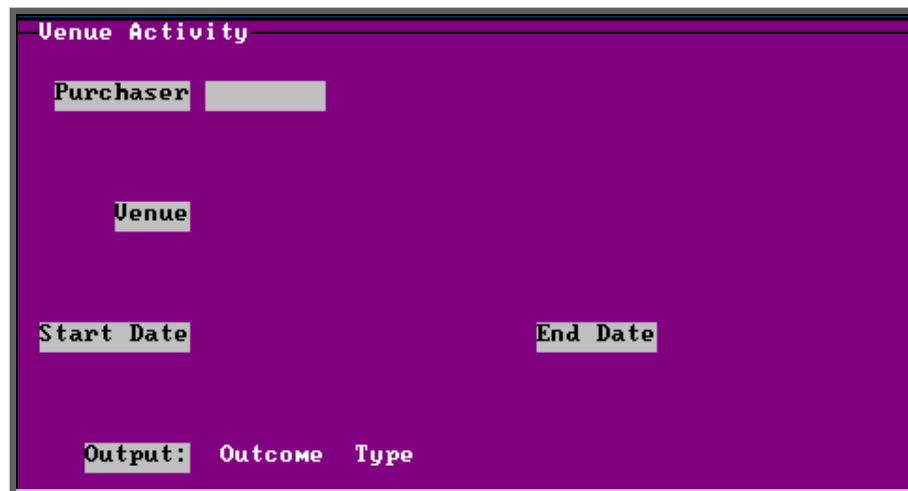
This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



19. Summaries – Venues

Menu: Reports – Appointments – Summaries – Venues or

Menu: Appointments – Print – Reports – Summaries – Venues



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



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

Screen

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

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

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

Printer

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

Below is an example of the **Venue** report selecting Outcome.

New NHS Trust				Key :				0 - No Outcome recorded
Venues Appointment Activity								1 - Attended
ALL PURCHASERS								2 - Did not Attend
Start Date: 01/01/2000								3 - Could Not Attend
End Date: 04/07/2008								4 - Collect Only
								5 - Cancelled by Hospital
								6 -
Venue	Total	Time	%age	0	1	2	3	
A N Other Clinic	5	90	0.9%	3	1	1		
Diabetic Foot Clinic	3	60	0.6%	1	1	1		
LINDAS SPECIAL CLINIC	11	165	1.6%		11			
MARTINS NOT SO SPECIAL CLINIC	1	10	0.1%		1			
New Clinic	30	630	6.3%	4	22	3	1	
Orthotic Clinic	648	8355	83.5%	182	348	27	43	
Test	7	100	1.0%		6	1		
TEST AREA	11	165	1.6%		11			
testing	14	420	4.2%		13	1		
Yet Another Test	1	15	0.1%		1			
Grand Total				190	415	34	44	
Count 10								

Below is an example of the **Venue** report selecting **Type**

New NHS Trust Venue Appointment Activity ALL PURCHASERS ALL VENUES Start Date: 01/01/2000 End Date: 04/07/2008									
Directorate	Total	Time	%age	New	Review	Fit	Supply	Cast	Other
A N Other Clinic	5	90	0.9%		1				4
Diabetic Foot Clinic	3	60	0.6%						3
LINDAS SPECIAL CLINIC	11	165	1.6%	1					10
MARTINS NOT SO SPECIAL CLINIC	1	10	0.1%						1
New Clinic	30	630	6.3%	4	2				27
Orthotic Clinic	648	8355	83.5%	55	7	85	7	4	494
Test	7	100	1.0%						7
TEST AREA	11	165	1.6%	1			1		11
testing	14	420	4.2%	1					10
Yet Another Test	1	15	0.1%						1
Grand Total	731	10010		62	10	85	8	4	568
Count 10									

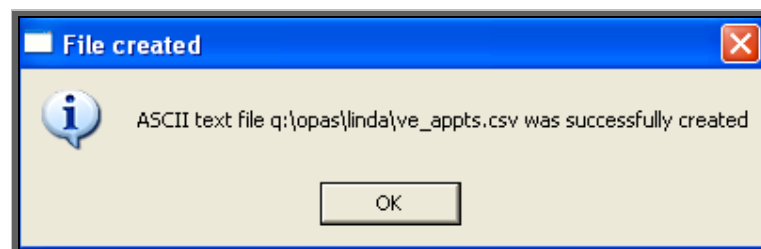
File

A comma separated variable file will be created called

ve_appts.csv if analysed by outcome

vt_appts.csv if analysed by type

This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



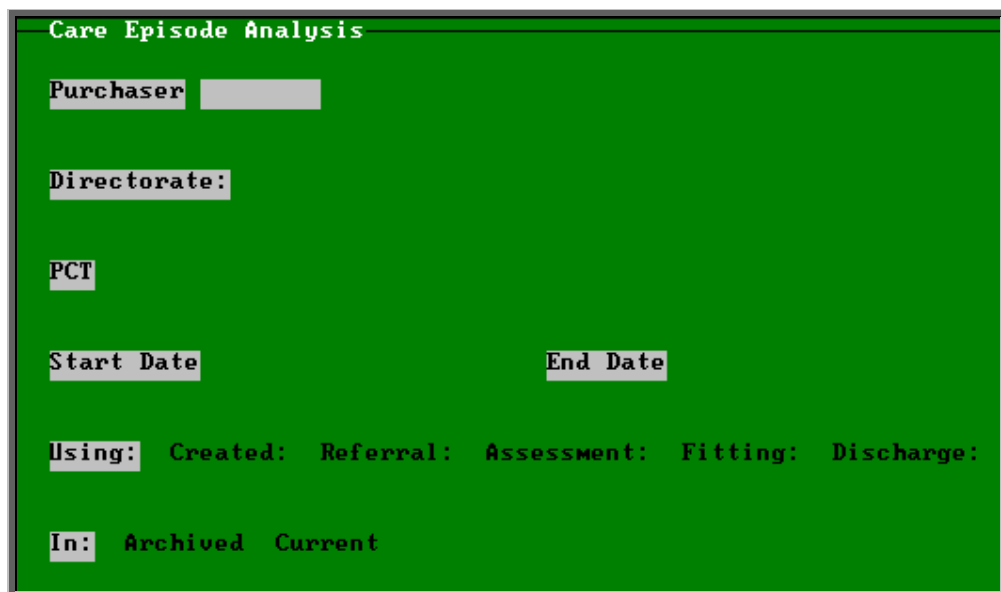
20. Care Episodes (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 2 different batch reports for care episodes. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

21. Care Episodes – Analysis

This report can be used to interrogate either current or archived care episodes. Separate report definitions are used, so you can have different layouts for your archived and current care episode reports.

Menu: Reports – Care Episodes – Analysis



Care Episode Analysis

Purchaser

Directorate:

PCT

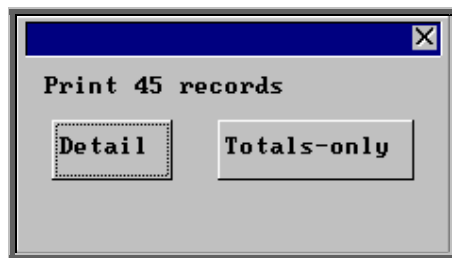
Start Date End Date

Using: Created: Referral: Assessment: Fitting: Discharge:

In: Archived Current

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

- select the **Directorate:** required from the pop-up list to find all those patients which belong to that directorate. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Directorate:** field empty will result in all directorates being selected
- select the **PCT** required from the pop-up list to find all those patients which belong to that PCT. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **PCT** field empty will result in all PCTs being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select whether the date range selected should look at the care episodes **Created, Referral, Assessment, Fitting or Discharge** date
- select whether you want to interrogate **Current** or **Archived** care episodes



You will be shown how many care episodes OPAS has found and ask if you want to see the information in **Detail** i.e. a line for each waiting list entry or just **Totals-only**



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

Screen

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

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

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

Printer

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

Below is an example of the **Analysis** report selecting **Detail**.

Hospital No	Patient	Appoints	Time	Orders	Net :	Gross :
NAH280965	MR JAMES BROWN	0	0:00	1	64.00	64.00
123456789	MR KELVIN BLOGGGS	10	1:45	1	123.45	145.05
NTEMP000010	MR MARTIN CRAVEN	1	0:15	1	220.00	220.00
NDR543387	MR GEORGE SMITH	1	0:15	1	197.00	231.48
8776877	Mr Sylvester Stal one	2	0:00	3	168.95	198.51

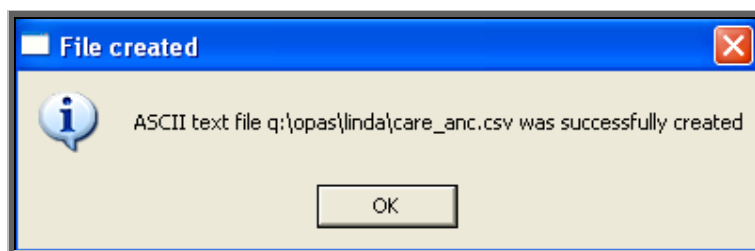
Page 1 dated 17/06/2008
 Printed by LINDA
 care_ana.dfr - Archived Care Episodes

The footer in the bottom left corner of the report will indicate whether the report is on current or archived care episodes

The report layouts (**care_ana.dfr** and **care_anc.dfr**) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called **care_anc.csv** if analysing current care episodes and **care_ana.csv** for the archived care episodes. This will be saved in your personal directory within OPAS. This can be exported into Lotus123 or MS Excel.



22. Care Episodes – Current

This report interrogates your current care episodes and finds those that are still active (i.e. there is no date of discharge entered).

Menu: Reports – Care Episodes – Current



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

Screen

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

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

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

Printer

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

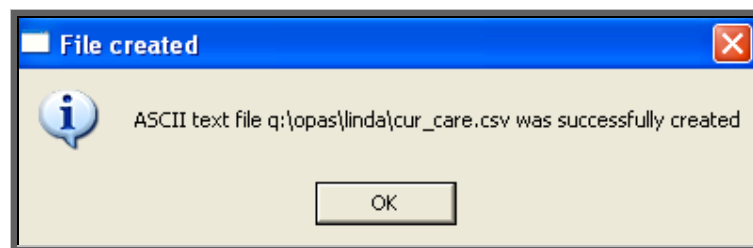
Below is an example of the **Current** report.

Case :	Hospital No	Patient	Referral :	Assessment :	Target Date :	Weeks wait to date
CE00049	NQWE345768	MR JOHN SMYTHE	13/01/2008		18/05/2008	3
CE00051	67567	Mr Phil Oakley	13/01/2008	04/02/2008	18/05/2008	3
CE00050	432523	Mr John Brown	13/01/2008		18/05/2008	3
CE00052	NAH280965	MR JAMES BROWN	04/02/2008		09/06/2008	0
Total for NHS TRUST		13				
CE00011	NTEMP000009	MS MARY LITTLE	02/09/1999		06/01/2000	440
CE00015	NQ123432	MR TONY JACK	20/12/1999		24/04/2000	424
CE00022	NA61848	MR PAUL LAKE	31/05/2000		04/10/2000	401
Total for Primary Care Group		3				

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

File

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



23. Financial Reports (Ad Hoc)

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

Menu: Reports – Financial – Ad hoc or

Menu: History – Reports – Ad hoc

OPAS Reports Selection Criteria Screen

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

Purchaser

Select

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

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

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

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

Dates

Select

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

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

Range if you want to report on a range of dates (this is the usual practice e.g. a month, quarter or year). Use the space bar on your keyboard to move the highlight from **All** to **Range** and press **Enter**.

Type the 'start' date in the space provided in the format DD MM YYYY and press **Enter**.

Now type in the 'end' date in the next space provided in the format DD MM YYYY and press **Enter**.

Using

Select

Ordered	if you want to report on those orders that have an order date within the dates selected above
Received	if you want to report on those orders that were received within the dates selected above
Supplied	if you want to report on those orders that were supplied within the dates selected above
Invoiced	if you want to report on those orders where the date of the suppliers invoice is within the dates selected above
Purchase_ Invoice	if you want to report on those orders where the date of the purchase invoice is within the dates selected above
Paydate	if you want to report on those orders that were the passed for payment date is within the dates selected above

Continue

Select

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

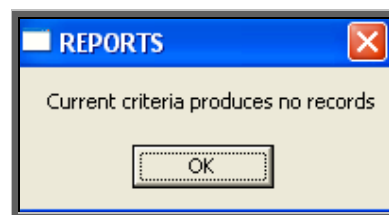
Yes if you wish OPAS to search for the orders that match the criteria selected

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

OPAS Reports Selection Criteria Screen

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

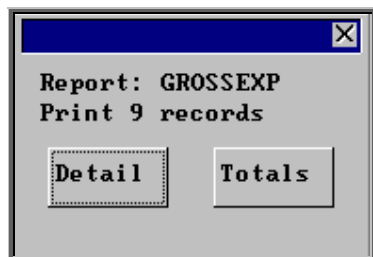
Once you have selected **Yes** to continue, OPAS will search for all those orders that match the criteria selected. If no matches are found, the following message will appear.



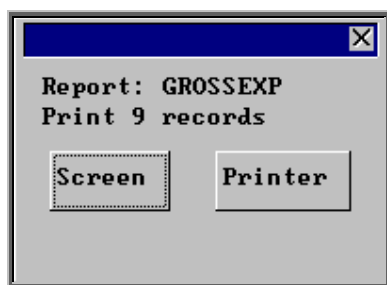
If orders have been found that match your criteria then this **Reports** menu will appear.

Gross Expenditure

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



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



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

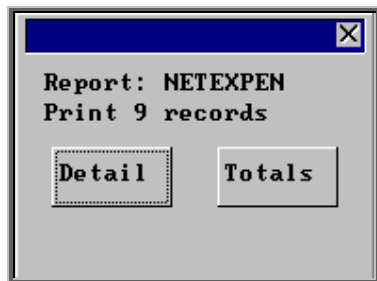
Below is an example of the **Gross Expenditure** report selecting **Detail**.

New NHS Trust			
Directorate: Trauma & Orthopaedic			
Ordered: 01/04/2007 - 31/03/2008			
Hospital No	Order No	Patient	Gross:
NG8711265	VGI S16	MR B PEACOCK	79.25
NG8711265	VGI S17	MR B PEACOCK	39.63
Total for Directorate			118.88
Count			2

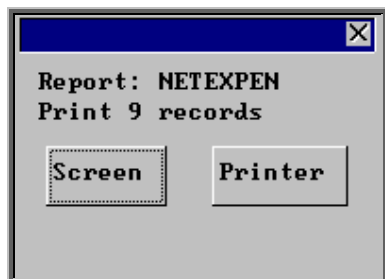
The report layout (grossexp.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

Net Expenditure

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



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



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

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

New NHS Trust				
Directorate: Trauma & Orthopaedic				
Ordered: 01/04/2007 - 31/03/2008				
Hospital No	Order No	Patient	Net Cost	
NG8711265	VGI S16	MR B PEACOCK	67.45	
NG8711265	VGI S17	MR B PEACOCK	33.73	
Total for Directorate Trauma & Orthopaedic			101.18	
			Count 2	

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

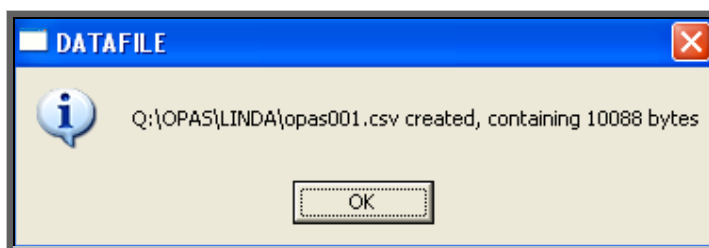
Datafile

The **Datafile** option saves the information found as a comma separated variable file so that the data can be exported into a spreadsheet for manipulation, or into a report.

Having selected **Datafile**, you can then choose what information on the order will be transferred. Move down the list, selecting those fields required by pressing **F7**. If a field

is selected by mistake press **F7** again to de-select. The list is more than a page, so scroll down the page to see more. Once you have all the fields required press **F10** to continue. In the example below, I have selected the Order Number, Order Date, Patients full name and the Supplier name.

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

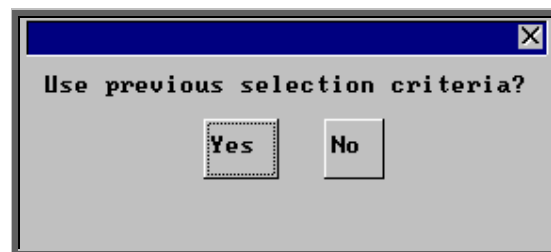


A comma separated variable file will be created in your personal directory.

The file name will use a counter so that the first time this is done the file will be saved as opas001.csv and then opas002.csv and so on. This can now be opened in Lotus123 or MS Excel.

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

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



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

24. Financial Reports (Batches)

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

25. Financial report – Activity

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

Menu: Reports – Financial – Batches – Activity or

Menu: History – Reports – Batches – Activity

Activity

Purchaser [dropdown]

Referrer [dropdown]

GP: [dropdown]

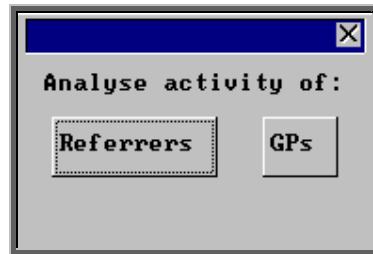
Both **In-patients** **Out-patients**

Start Date [text] **End Date** [text]

Using: ☐ **Ordered** ☐ **Received** ☐ **Supplied** ☐ **Invoiced** ☐ **Purchase_Invoice** ☐ **Paydate**

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected.
- select the **Referrer** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Referrer** field empty will result in all referrers being selected.
- select the **GP** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **GP** field empty will result in all GPs being selected.
- select **In-patients**, **Out-patients** or **Both**. Press the space bar to move the highlight onto the required option.
- enter the **Start date** of the required date range in the format DD MM YYYY.
- enter the **End date** of the required date range in the format DD MM YYYY.

- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



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



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

Screen

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

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

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

Printer

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

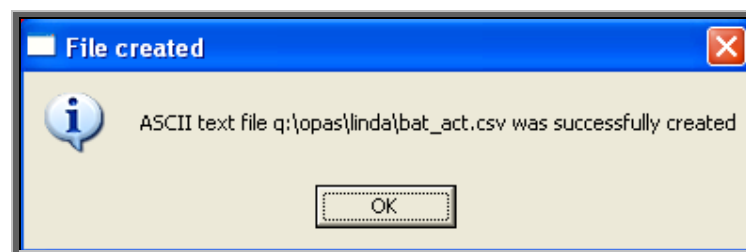
Below is an example of the **Activity** report, selecting **Referrer**.

NHS TRUST				
Consultant Activity : All patients 28/10/2003				
01/01/2000 - 21/12/2003				
Directorate	Consultant	episodes	Cost	
Paediatrics	A N Other	1	352 .50	352 .50
Trauma & Orthopaedic	A N Other	1	338 .94	338 .94
	Mr Surgeon	11	1476 .25	134 .20
Directorate Total		12	1815 .19	

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

File

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



26. Financial report – Clinician

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

Menu: Reports – Financial – Batches – Clinician or

Menu: History – Reports – Batches – Clinician



Clinicians

Purchaser [dropdown arrow]

Venue

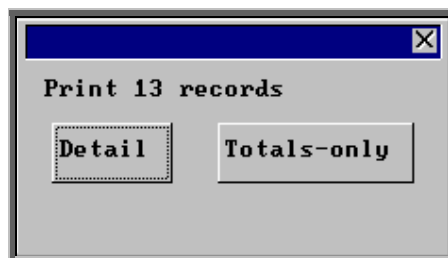
Clinician

By: Orthosis_code Directorate

Start Date **End Date**

Using: Ordered Received Supplied Invoiced Purchase_Invoice Paydate

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected.
- select the Venue required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Venue field empty will result in all venues being selected.
- select the Clinician required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Clinician field empty will result in all clinicians being selected
- select Orthosis_code or Directorate depending on how you want to analyse the data. Press the space bar to move between the options
- enter the Start date of the required date range in the format DD MM YYYY.
- enter the End date of the required date range in the format DD MM YYYY.
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.



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



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

Screen

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

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

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

Printer

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

Below is an example of the **Clinician** report selecting Orthosis_code and Detail.

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

The report layouts (bat_ortc.dfr and bat_ortd.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

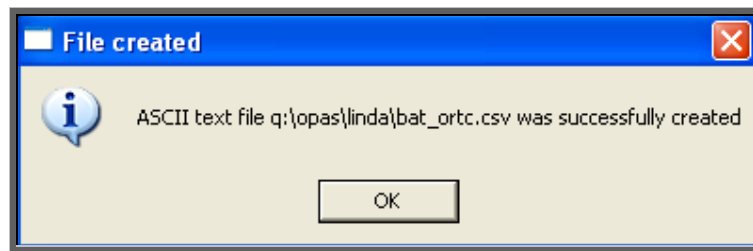
File

A comma separated variable file will be created called

bat_ortc.csv if Orthosis_code is selected

bat_ortd.csv if Directorate is selected

This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



27. Financial report - Clinics

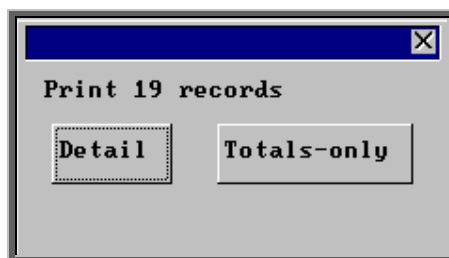
The **Clinics** report will breakdown the expenditure by the *Clinic* (Venue) field on the orders.

Menu: Reports – Financial – Batches – Clinics or

Menu: History – Reports – Batches – Clinic

Clinics						
Purchaser:	<input type="text"/>					
Venue	<input type="text"/>					
Referrer	<input type="text"/>					
Start Date	<input type="text"/>		End Date	<input type="text"/>		
Using:	Ordered	Received	Supplied	Invoiced	Purchase_Invoice	Paydate

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected.
- select the **Venue** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Venue** field empty will result in all venues being selected.
- select the **Referrer** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Referrer** field empty will result in all referrers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY.
- enter the **End date** of the required date range in the format DD MM YYYY.
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



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



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

Screen

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

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

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

Printer

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

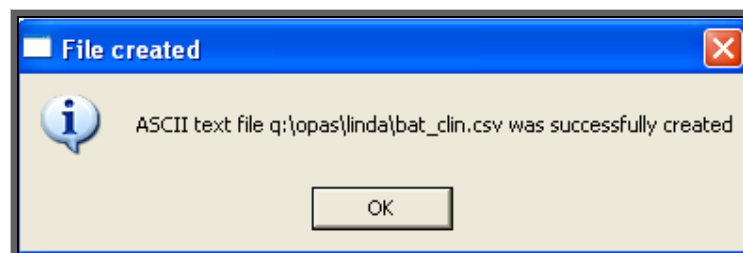
Below is an example of the **Clinics** report.

New User NHS Trust				
Monthly Report To Purchaser: Mr Surgeon Trauma & Orthopaedic				
01/01/2000 to 31/12/2003				
Clinic:	Code	Hosp No	Patient Name	Gross
Appliance Department	999999	G3350674	A YOUNG	14.38
	XYZ890	G9202344	D FREAKER	239.37
	999999	G3355370	D EYRE	64.51
	ABC123	ABC21234	M SS T EYES	328.29
	999999	01232195	J HAMILTON	2.17
	ABC123	G0326425	H CARNE	363.94
	ABC123	TEMP000010	MR M CRAVEN	363.94
	999999	TCRUS004	M SS T SM TH	346.87
	ABC123	G0230753	R BENNET	64.08
	111111	12345QWERTY	MR K BLOGGS	25.85
	ABC123	TMP000013	A HARTIGAN	9.72
	ABC123	12345QWERTY	MR K BLOGGS	0.00
Total				1,823.12
Count				12
Total for Consultant				1,823.12
Count				12

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

File

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



28. Financial report – Cost Code

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

Menu: Reports – Financial – Batches – Cost Code or

Menu: History – Reports – Batches – Cost Code

Cost Codes

Purchaser [dropdown arrow]

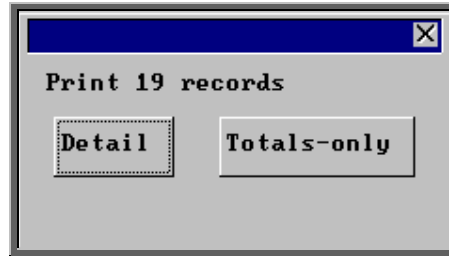
Orthosis Code: [dropdown arrow]

Start Date [dropdown arrow] **End Date** [dropdown arrow]

Using: Ordered Received Supplied Invoiced Purchase_Invoice Paydate

Reconciliation [dropdown arrow] **By:** [dropdown arrow]

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- select the **Orthosis Code** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Orthosis Code** field empty will result in all orthosis codes being selected
- enter the **Start date** of the required date range in the format DD MM YYYY.
- enter the **End date** of the required date range in the format DD MM YYYY.
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.
- select **No** to print the standard **Costcode** report that shows orders raised by Orthosis Code.



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



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

Screen

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

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

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

Printer

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

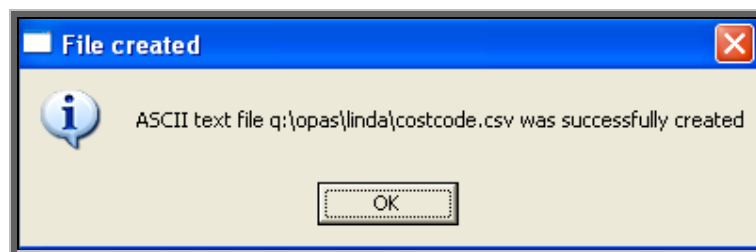
Below is an example of the **Cost Code** report with **No** reconciliation

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

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

File

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



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

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

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

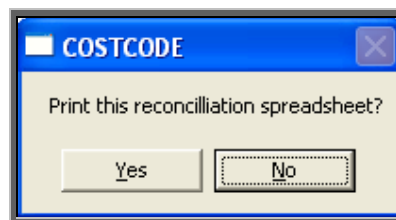
Select **Gross** if you want to know the value of the orders including VAT. If you select **Gross** you then have to choose whether you want the breakdown by Referrer, Directorate, Purchaser or Supplier.

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

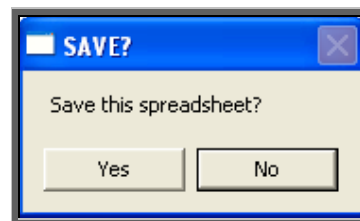
Below is an example of a spreadsheet produced by selecting **Net** and **Directorate**.

	1	2	3	4	5	6
1	Cost-code reconciliation					
2	ALL PURCHASERS by Supplier					
3	01/01/2000 - 06/07/2008					
4	Count					
5		111111	999999	ABC123	XYZ890	Totals
6	Jane Saunders & Mann	1.00			1.00	2.00
7	Peacocks Medical Gro	4.00	1.00	2.00	2.00	9.00
8	RSL Steeper	1.00				1.00
9	STOCK	1.00				1.00
10		-----				
11	Totals	7.00	1.00	2.00	3.00	13.00
12		=====				
13						

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



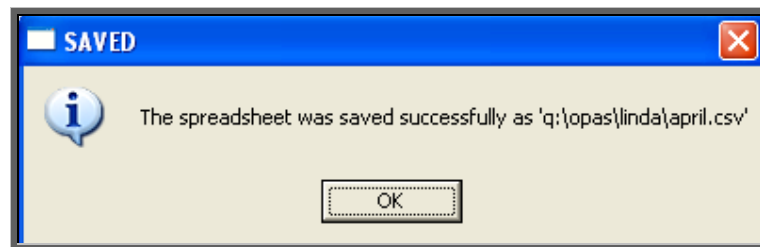
You will then be asked if you wish to save the spreadsheet.



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



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



29. Financial report - Creditors

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

Menu: Reports – Financial – Batches – Creditors or

Menu: History – Reports – Batches – Creditors

Creditors

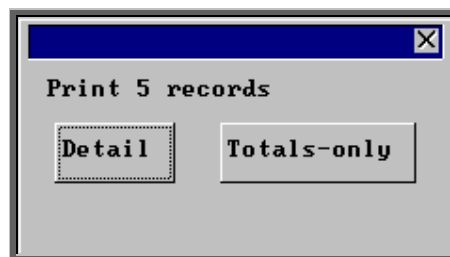
Purchaser

Supplier

Start Date

End Date

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



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



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

Screen

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

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

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

Printer

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

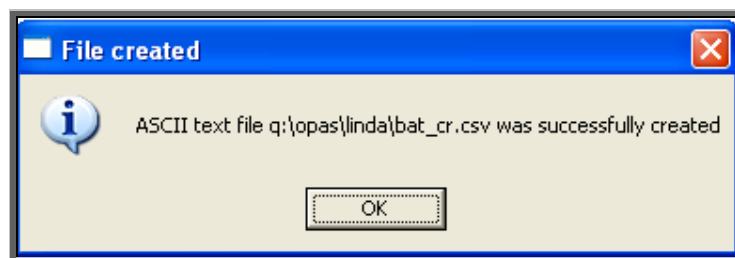
Below is an example of the **Creditors** report.

G00376	16/09/2002	28/01/2003	29/01/2003	ELIZABETH	BUTCHER	7.97
G00376/R1	28/04/2003			KELVIN	BLOGGS	0.00
G00376/R2	02/07/2003			KELVIN	BLOGGS	0.00
G00376/R3	04/09/2003			KELVIN	BLOGGS	0.00
Total for Bolton Bros.(Surg. Shoemakers) Ltd						7.97
Count 4						
1234567890	14/10/2003			KELVIN	BLOGGS	300.80
987656789	14/10/2003			KELVIN	BLOGGS	300.80
G00367	31/10/2001	06/06/2002		FRED	BLOGGS	103.26
G00396	28/04/2003			TEE	EYES	322.04
Total for Halo Healthcare Ltd						1,026.90

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

File

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



30. Financial report - Debtors

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

Menu: Reports – Financial – Batches – Debtors or

Menu: History – Reports – Batches – Debtors

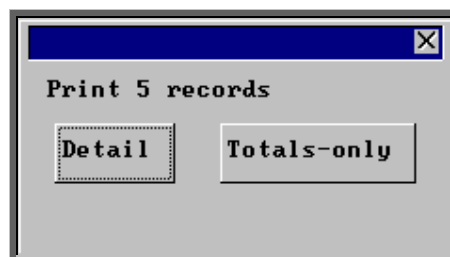


- select the **Purchaser** required from the pop-up list. If you select a Purchaser that is not an external purchaser the following message will appear. Press the **Tab** key to bring the pop-up list back and make another selection. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all external purchasers being selected.



Not available for 'Internal' Purchasers

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



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



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

Screen

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

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

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

Printer

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

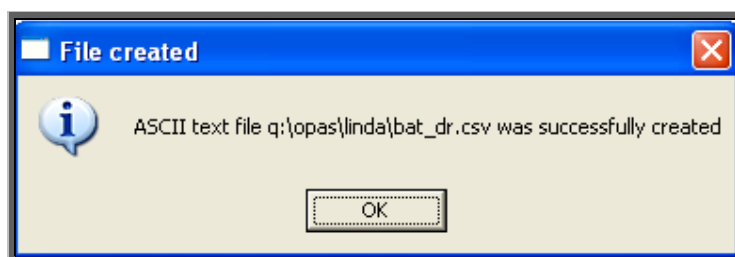
Below is an example of the **Debtors** report.

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

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

File

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

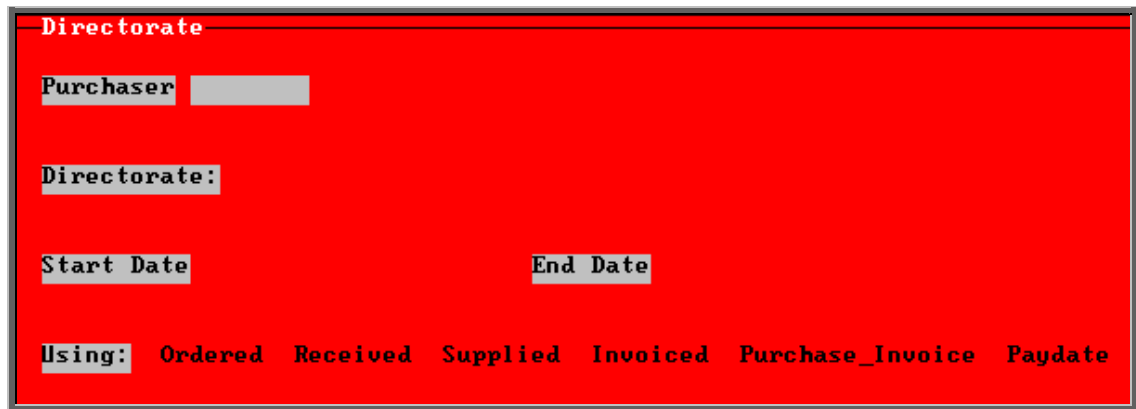


31. Financial report – Directorate

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

Menu: Reports – Financial – Batches – Directorate or

Menu: History – Reports – Batches – Directorate



Directorate

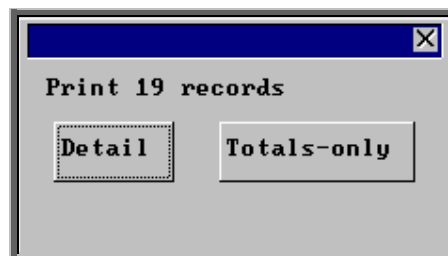
Purchaser

Directorate:

Start Date **End Date**

Using: Ordered Received Supplied Invoiced Purchase_Invoice Paydate

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected.
- select the **Directorate** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Directorate** field empty will result in all directorates being selected.
- enter the **Start date** of the required date range in the format DD MM YYYY.
- enter the **End date** of the required date range in the format DD MM YYYY.
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



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



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

Screen

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

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

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

Printer

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

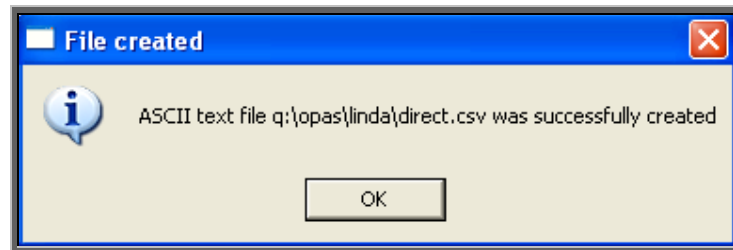
Below is an example of the Directorate report.

New User NHS Trust			
Gross Amount Spent by Directorate			
01/01/2001 to 31/10/2003			
Speccode	Directorate	IP	OP
PAED	Paediatrics		352 .50
			352 .50
	Total		352 .50
12345678	Trauma & Orthopaedic		239 .37
			64 .51
			328 .29
		2 .17	2 .17
			14 .38
			363 .94
			363 .94
			64 .08
			264 .35
			25 .85
			338 .94
	Total	2 .17	2 .067 .65
			2 .069 .82

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

File

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



32. Financial report – Emailed

This report is will provide a breakdown of orders that have been sent to the supplier via email.

Menu: Reports – Financial – Batches – Emailed or

Menu: History – Reports – Batches – Emailed



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

- select the **Supplier** required from the pop-up list. The list of suppliers will show only those that are set up for emailing. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Supplier** field empty will result in all email suppliers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



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



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

Screen

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

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

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

Printer

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

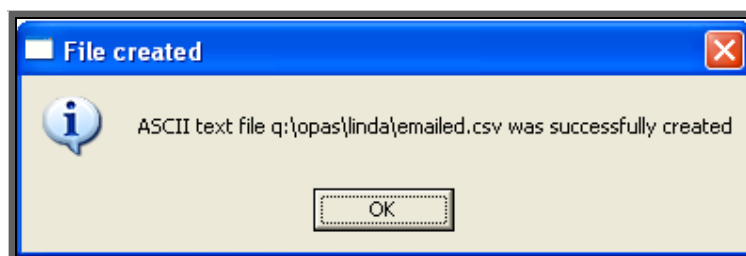
Below is an example of the **Emailed** report.

Emailed Orders						
Ordered 01/01/2007 - 10/06/2008						
All Purchasers - All Suppliers						
Supplier	Order No	Date of Order	Orth Code	Received	Cost	
Peacocks Medical Group Ltd	PA 00004	07/06/2007	111111			0.00
	VGIS1	09/10/2007	111111			150.00
					Total	150.00
					Count	2
Jane Saunders & Manning Ltd	MA00003	05/06/2007	ABC123	02/06/2008		0.00

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

File

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



33. Financial report - GPs

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

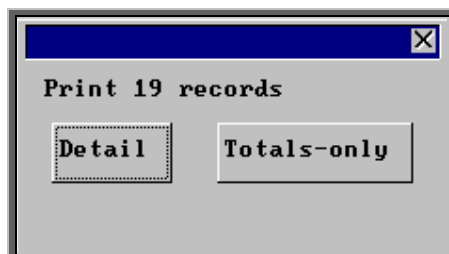
Menu: Reports – Financial – Batches – GPs or

Menu: History – Reports – Batches – GPs



The screenshot shows a 'GP Report' form with a red background. It contains several input fields: 'Purchaser:', 'PCT:', 'Practice:', and 'GP:'. Below these are 'Start Date:' and 'End Date:' fields. At the bottom, there is a 'Using:' label followed by a row of options: 'Ordered', 'Received', 'Supplied', 'Invoiced', 'Purchase_Invoice', and 'Paydate'. The 'Purchase_Invoice' option is currently highlighted.

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected.
- select the PCT required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the PCT field empty will result in all PCTs being selected.
- select the Practice required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Practice field empty will result in all practices being selected.
- select the GP required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the GP field empty will result in all GPs being selected.
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



The screenshot shows a small dialog box titled 'Print 19 records'. It contains two buttons: 'Detail' and 'Totals-only'. The 'Detail' button is currently selected and highlighted with a dashed border.

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



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

Screen

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

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

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

Printer

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

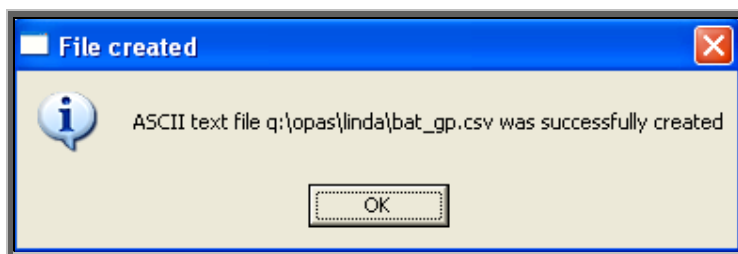
Below is an example of the GP report.

New User NHS Trust				
GP Practice Spend - All Purchasers				
01/ 01/ 2001-31/ 10/ 2003				
Date of Order	Order No	Surname	Doctor	Gross:
28/ 04/ 2003	G00395	BLOWED	ANDERSON MG	170.67
Total for : LENSFIELD MEDICAL PRAC.				170.67
Count 1				
28/ 04/ 2003	G00397	FERG VAL	FLAXMAN PA	64.86
Total for : LUTTERWORTH HEALTH CENTRE				64.86
Count 1				

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

File

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



34. Financial report – Graphs

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

Menu: Reports – Financial – Batches – Graphs or

Menu: History – Reports – Batches – Graphs

Graphs

Purchaser []

Year **Current** **Previous**

Start Date **End Date**

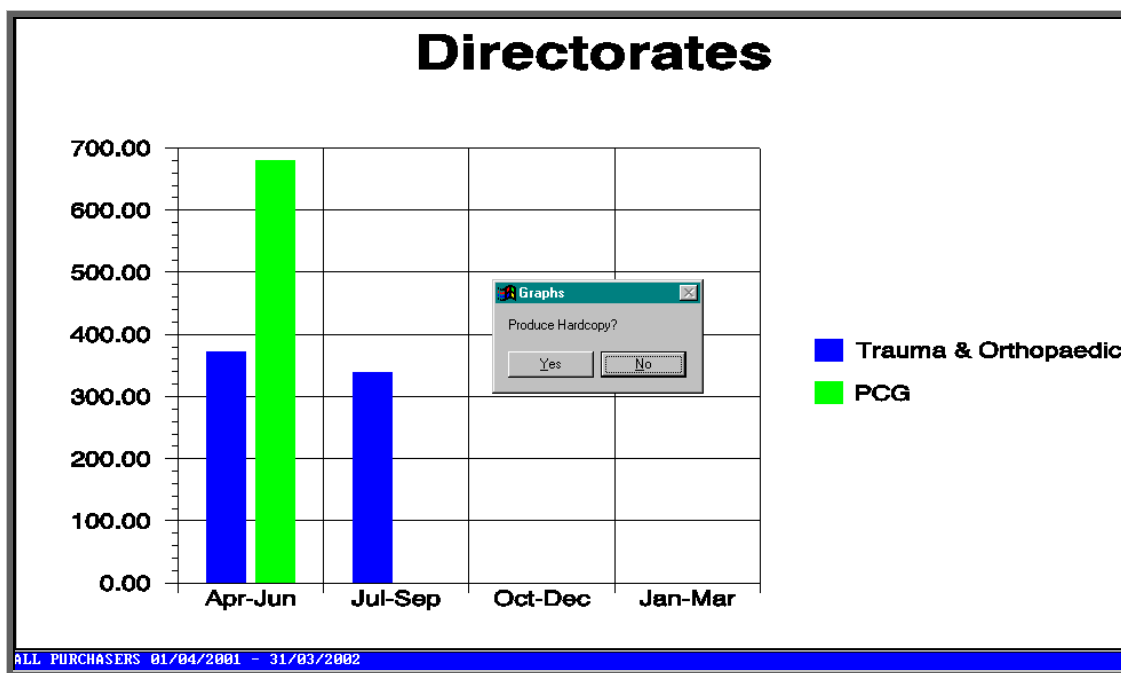
Using: **Ordered** **Received** **Supplied** **Invoiced** **Purchase_Invoice** **Paydate**

By **Orthosis_codes** **Directorates** **Type:**

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

- select **Current** year or **Previous** year. This covers a financial year i.e. 1 April to 31 March. Use the space bar to move between options
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.
- select what the data is to be analysed by i.e. on **Orthosis_codes** or **Directorates**. Use the space bar to move between options
- select **Type M** to see the full year broken down by month
- select **Type Q** to see the full year broken down by quarters
- select **Type 1** to see the first quarter (1 April – 30 June) broken down by month
- select **Type 2** to see the second quarter (1 July – 30 September) broken down by month
- select **Type 3** to see the third quarter (1 October – 31 December) broken down by month
- select **Type 4** to see the fourth quarter (1 January – 31 March) broken down by month

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



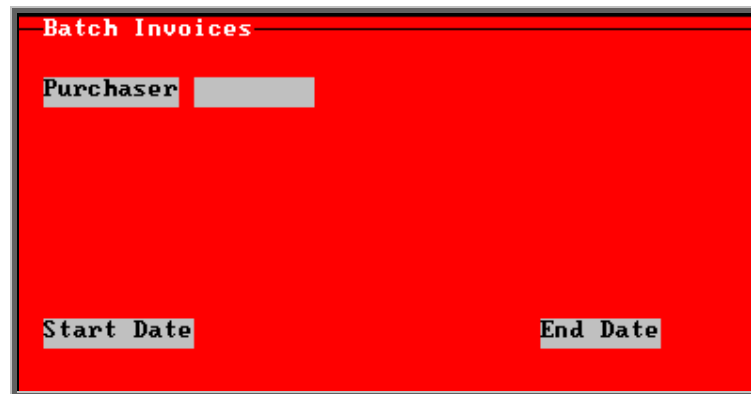
The graph will appear on the screen, but you have the option to print a hardcopy.

35. Financial report - Invoices

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

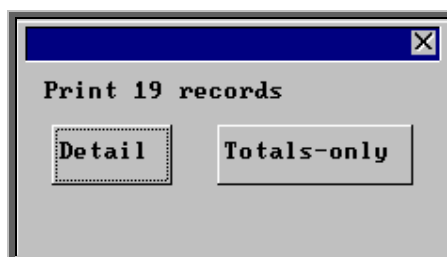
Menu: Reports – Financial – Batches – Invoices or

Menu: History – Reports – Batches – Invoices



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

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



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



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

Screen

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

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

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

Printer

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

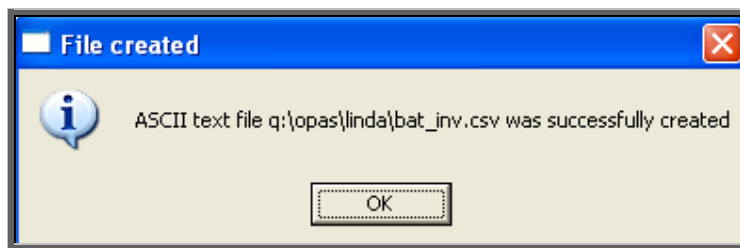
Below is an example of the **Invoice** report.

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

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

File

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

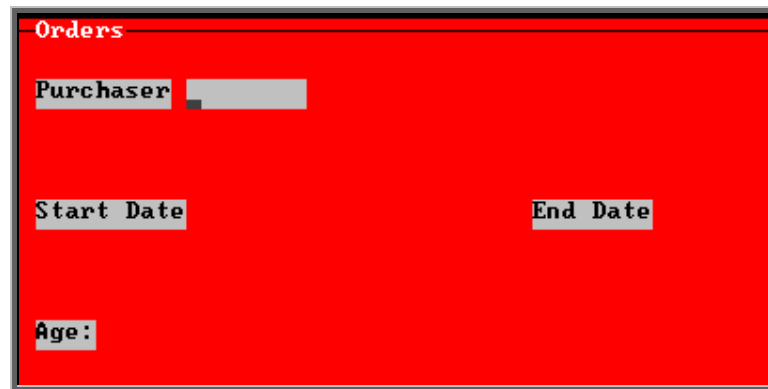


36. Financial report - Orders

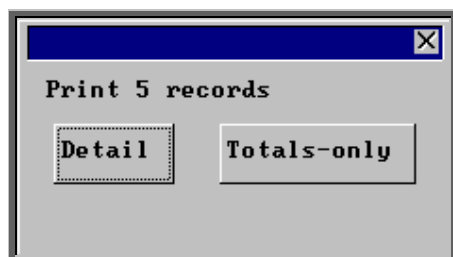
The Orders report shows details of orders raised over a specific period.

Menu: Reports – Financial – Batches – Orders or

Menu: History – Reports – Batches – Orders



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



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



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

Screen

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

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

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

Printer

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

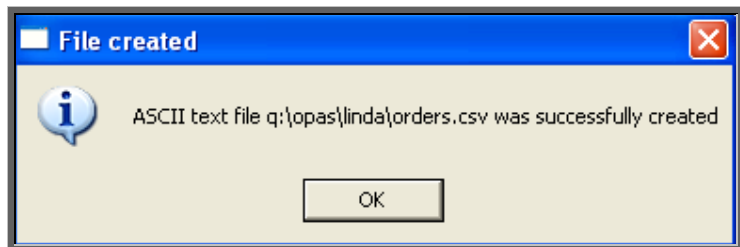
Below is an example of the **Orders** report.

New User NHS Trust Orders raised by Trauma & Orthopaedic 01/01/2000 to 31/12/2002										
Order Date	Order No	Supplier	Description	Spec. code	Consultant	Received	Sup Inv No	Inv Date	Paydate	Gross
11/07/2001	1234567	Medistox Ltd	COLLAR	12345678	Mr Surgeon	20/08/2001	3401011	12/07/2001	27/04/2003	2.17
28/05/2001	G00351	Halo Healthcare Ltd	Boots	12345678	Mr Surgeon	10/05/2002	55442	15/04/2003	27/04/2003	239.37
31/10/2001	G00357	Halo Healthcare Ltd	Shoes	12345678	Mr Surgeon	05/06/2002				103.26
26/06/2002	G00367	Jane Saunders & Mann	Collar	12345678	Mr Surgeon	01/08/2002				14.69
27/06/2002	G00368	Jane Saunders & Mann	Shoes	12345678	Mr Surgeon	09/10/2002				94.59
12/07/2002	G00369	Jane Saunders & Mann	Shoes	12345678	Mr Surgeon	23/07/2002	56755544	05/02/2003	27/04/2003	363.94
14/08/2002	G00373	Peacocks Medical Gro	KNEE BRACE	12345678	Mr Surgeon	15/08/2002	01016	09/10/2002	27/04/2003	346.87
11/09/2002	G00375	Jane Saunders & Mann	Shoe	12345678	Mr Surgeon	08/10/2002				142.42
12/06/2001	VI 234	Halo Healthcare Ltd	SHOES	12345678	Mr Surgeon	10/05/2002	01010	13/06/2001	31/03/2003	328.29
Total for Mr Surgeon										1,635.60
										Count 9

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

File

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



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

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

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

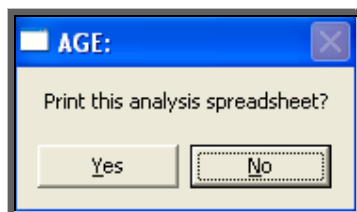
Select **Gross** if you want to know the value of the orders including VAT.

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

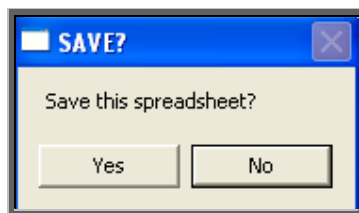
Below is an example of a spreadsheet produced by selecting **Net**.

	1	2	3	4	5	6	7	8
1	Age Analysis							
2								
3	01/01/2000 - 06/07/2000							
4	Count							
5		0-5	6-16	17-30	31-50	51-65	66+	Totals
6	1				3.00	2.00	3.00	8.00
7	2					1.00		1.00
8	4							0.00
9	5						1.00	1.00
10	-----							
11	Totals				3.00	3.00	4.00	10.00
12	=====							
13								

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



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



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



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



37. Financial report – Payments

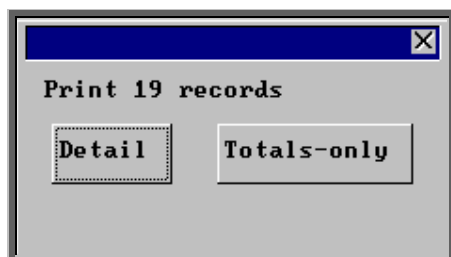
This report will show those orders that have been passed for payment between the selected dates

Menu: Reports – Financial – Batches – Payments or

Menu: History – Reports – Batches – Payments

A screenshot of a form titled 'Payments'. The form has a red background. It contains a 'Purchaser' label followed by a greyed-out text box. At the bottom, there are two labels: 'Start Date' and 'End Date', each followed by a greyed-out text box.

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



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



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

Screen

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

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

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

Printer

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

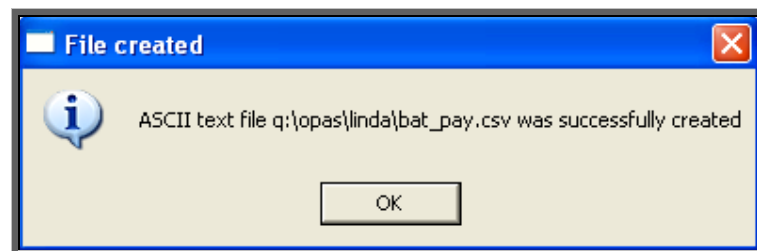
Below is an example of the **Payments** report.

New User NHS Trust									
Invoices Passed for Payment									
01/ 01/ 2000 to 31/ 10/ 2003									
Pay date	Date of	Order	Order	No Sup	Inv	No Invoice	Date	Net	Gross
31/ 03/ 2003	12/ 06/ 2001		VI234	01010		13/ 06/ 2001		279.39	328.29
27/ 04/ 2003	28/ 05/ 2001		G00351	55442		15/ 04/ 2003		203.72	239.37
Total for Halo Healthcare Ltd								483.11	567.66
27/ 04/ 2003	28/ 05/ 2001		G00350	11211		01/ 04/ 2003		12.24	14.38
Total for Tyco Healthcare (UK) Ltd								12.24	14.38

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

File

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



38. Financial report – Profit

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

Menu: Reports – Financial – Batches – Profit or

Menu: Orders – Reports – Batches – Profit

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

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

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

Screen

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

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

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

Printer

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

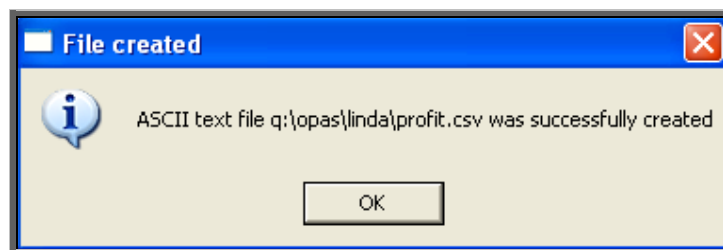
Below is an example of the **Profit** report.

New User NHS Trust Profit report for A N OTHER 01/ 01/ 2001 to 31/ 10/ 2003					
Order No	Purchase Total	Purchase VAT	Sales Total	Sales VAT	Profit
G00350	14.38	2.14	14.02	2.45	1.29
G00369	363.94	54.20	354.84	62.10	32.59
G00373	346.87	51.66	355.12	62.14	49.98
G00383	14.69	2.19	14.69	2.57	1.73
WM234	328.29	48.90	330.78	57.88	41.36
Totals	1068.17	159.09	1069.45	187.14	126.94

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

File

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



39. Financial report – Progress

This report has two uses. It can either provide the information needed to chase suppliers that have not delivered goods by the expected supply date, or it can be used to find those orders with a specific action e.g. returned or supplied.

Menu: Reports – Financial – Batches – Progress or

Menu: Orders – Reports – Batches – Progress

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the Supplier required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected
- *Action:* Leave this field blank if you want to find orders that have not been received.

Alternatively, this field can be used to find orders **Ordered**, **Booked In**, **Returned** or **Supplied** within the date range specified. To do this, type the appropriate letter into the *Action:* field (O, I, R or S)

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

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



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

Screen

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

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

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

Printer

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

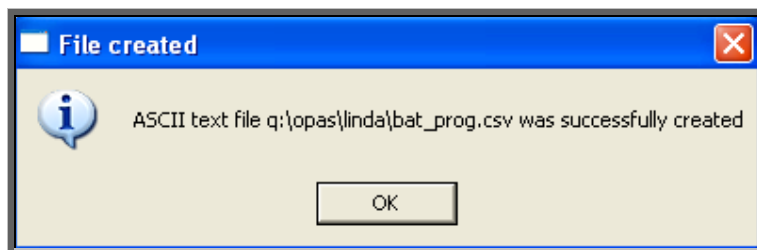
Below is an example of the Progress report leaving the *Action:* field blank.

New User NHS Trust Batch Progress Report 01/ 01/ 2000 - 31/ 10/ 2003						
Supplier	Patient	Order No	Orth Code	Order date	Req. By	Expected
Bolton Bros. (Surg. Shoemakers) Ltd	HUCKER	EXT00394	ABC123	28/ 04/ 2003	26/ 05/ 2003	.....
Halo Healthcare Ltd	HARTIGAN	G00393	ABC123	28/ 04/ 2003	26/ 05/ 2003	.....
Tyco Healthcare (UK) Ltd	BLOWED	G00395	XYZ890	28/ 04/ 2003	05/ 05/ 2003	.....
Gilbert & Mellish Ltd	BLOGGS	00363	ABC123	25/ 06/ 2002	23/ 07/ 2002	.....
JJR Orthopaedic Services	BLOGGS	G00405	ABC123	03/ 09/ 2003	01/ 10/ 2003	.....
Medistox Ltd	FERQVAL	G00397	111111	28/ 04/ 2003	12/ 05/ 2003	.....
Peacocks Medical Group Ltd	BLOGGS	G00389	ABC123	25/ 04/ 2003	23/ 05/ 2003	.....
Peacocks Medical Group Ltd	SMITH	G00390	ABC123	25/ 04/ 2003	23/ 05/ 2003	.....
Peacocks Medical Group Ltd	PARGETTER	G00409	ABC123	04/ 09/ 2003	16/ 10/ 2003	.....
Ortho C Fab	BLOGGS	G00371	ABC123	25/ 07/ 2002	22/ 08/ 2002	.....
Rampoly Healthcare	BLOGGS	G00358/R2	999999	10/ 06/ 2002	05/ 05/ 2003	.....
	VIREN	G00391	ABC123	25/ 04/ 2003	23/ 05/ 2003	.....

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

File

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



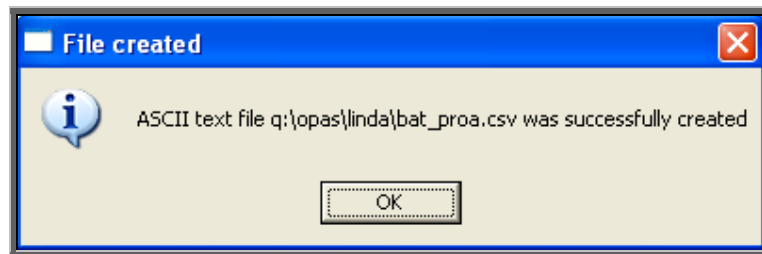
Below is an example of the Progress report selecting the *Action: I (In)*.

Progress Report All Purchasers Orders Received between 01/ 01/ 2008 - 06/ 07/ 2008				
Purchaser	Order	GRN	Supplier	Description
NHS TRUST	PA00046		Ken Hall Ltd	Cast
NHS TRUST	PA00046		Ken Hall Ltd	Cast
NHS TRUST	PA00064		Halo Healthcare Ltd	test
NHS TRUST	PA00072		Relief Orthotics Lim	Shoes

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

File

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



40. Financial report – Purchases

The **Purchases** report is a quick way of getting totals of expenditure, analysed by Referrer, Directorate, GP, Orthosis Code or Supplier.

Menu: Reports – Financial – Batches – Purchases or

Menu: History – Reports – Batches – Purchases

Purchases

Purchaser

Start Date **End Date**

Using: **Ordered** **Received** **Supplied** **Invoiced** **Purchase_Invoice** **Paydate**

By:

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.
- select what the data is to be analysed **By**: i.e. on **Clinician**, **Referrer**, **Directorate**, **GP**, **PCT**, **Orthosis_code**, **Purchaser**, **User** or **Supplier**. Use the space bar to move between options



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



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

Screen

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

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

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

Printer

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

Below is an example report of the **Purchaser** report analysing by Directorate, and selecting Totals-only.

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

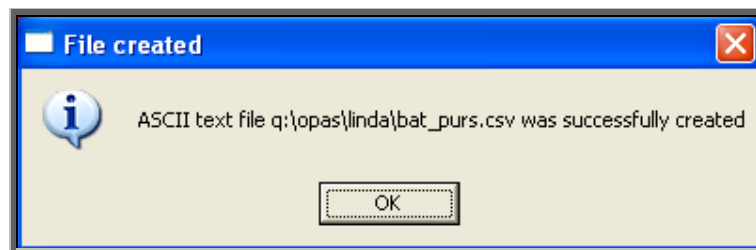
The report layout (bat_purd.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

A comma separated variable file will be created called

bat_purc.csv	if clinician is selected
bat_puro.csv	if orthosis code is selected
bat_purd.csv	if directorate is selected
bat_purg.csv	if GP is selected
bat_purt.csv	if PCT is selected
bat_purp.csv	if purchaser is selected
bat_purr.csv	if referrer is selected
bat_purs.csv	if supplier is selected
bat_puru.csv	if user is selected

This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



41. Financial report – Quarterly

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

Menu: Reports – Financial – Batches – Quarterly or

Menu: History – Reports – Batches – Quarterly

Quarterly Analysis

Purchaser

Year **Current** **Previous** **Start Date** **End Date**

Using: **Ordered** **Received** **Supplied** **Invoiced** **Purchase_Invoice** **Paydate**

For:

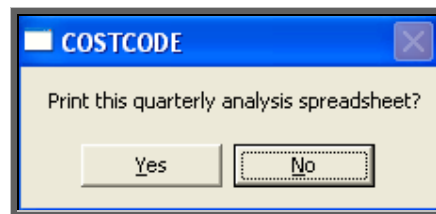
Using **Net** **Gross** **Sell** **Type:**

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

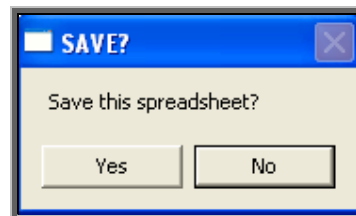
Below is an example produced by selecting Current year, Directorate, Net and Type Q

	1	2	3	4	5	6
1	Directorate analysis					
2	All Purchasers					
3	01/04/2008 - 31/03/2009					
4	Net Cost					
5		Q1	Count		Q2	Count
6	General		7		4	
7	PCT		3			
8	-----					
9	Totals		10		4	
10	=====					
11						
12	Printed 6/7/2008 by LINDA					
13						

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



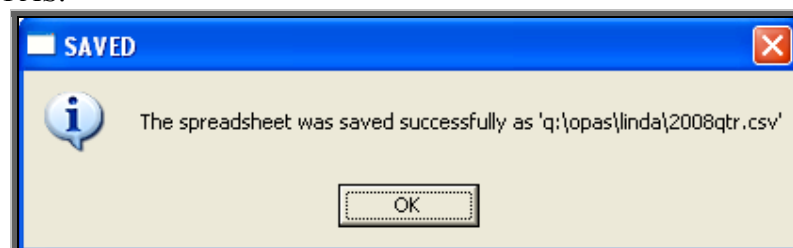
You will then be asked if you wish to save the spreadsheet.



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



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

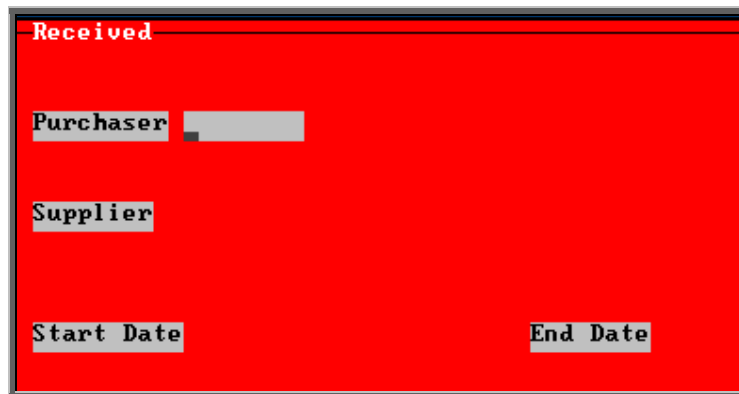


42. Financial report – Received

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

Menu: Reports – Financial – Batches – Received or

Menu: History – Reports – Batches – Received



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



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

Screen

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

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

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

Printer

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

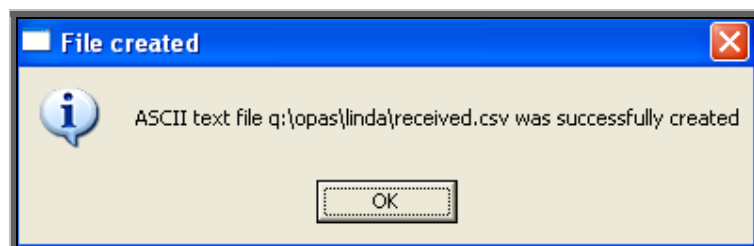
Below is an example of the **Received** report.

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

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

File

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

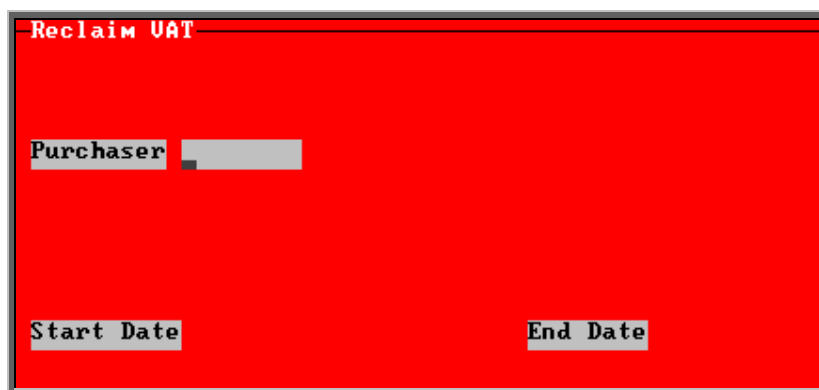


43. Financial report – Reclaim VAT

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

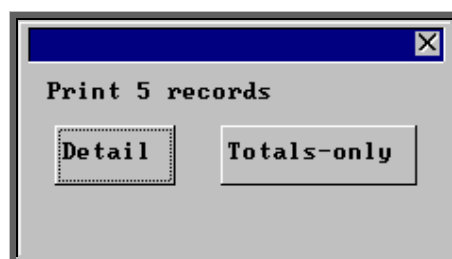
Menu: Reports – Financial – Batches – Reclaim VAT or

Menu: History – Reports – Batches – Reclaim VAT



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

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



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



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

Screen

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

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

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

Printer

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

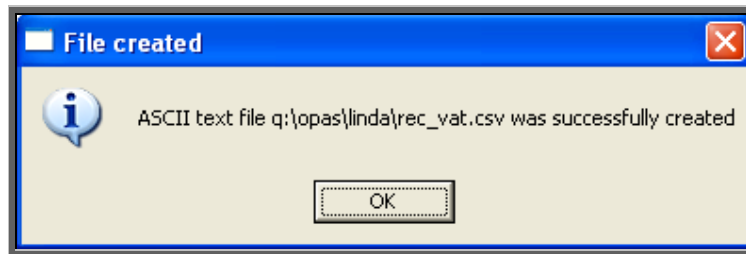
Below is an example of the Reclaim VAT report.

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

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

File

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



44. Financial report - Referrers

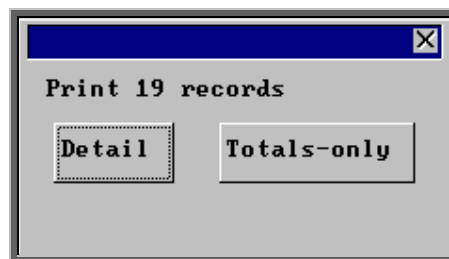
The **Referrers** report will also breakdown the expenditure on orders by the patients Referrer, but will allow you select a specific Purchaser and/or Directorate. A specific Referrer cannot be selected using this report. For specific Referrers use the **Clinics** report.

Menu: Reports – Financial – Batches – Referrers or

Menu: History – Reports – Batches – Referrers



- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- select the **Directorate** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Directorate** field empty will result in all directorates being selected
- select the **Referrer** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Referrer** field empty will result in all referrers being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



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



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

Screen

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

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

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

Printer

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

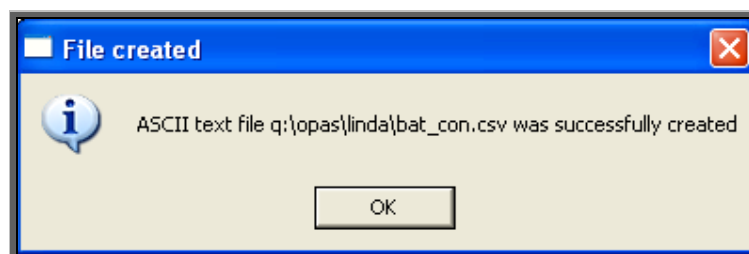
Below is an example of the **Referrers** report.

New User NHS Trust Monthly Report To Purchaser : 01/ 01/ 2000 to 31/ 10/ 2003				
Code	Hosp No	Patient Name	Order No	Gross
XYZ890	WOFNEOW	MASTER S BROWN	G00359	352.50
111111	TORUS004	M SS T SM TH	G00403/ R1	338.94
Total for A N Other Paediatrics			Sum	691.44
			Av g	345.72
			Count	2
999999	G3355370	D EYRE	23456	64.51
999999	01232195	J HAM LTCN	1234567	2.17
XYZ890	G9202344	D FREAKE	G00351	239.37
ABC123	TEMP000010	MR M CRAVEN	G00370	363.94
ABC123	G0230753	R BENNET	G00377	64.08
ABC123	G123456	M SS J COLE	G00379	264.35
111111	123456789	MR K BLOGS	G00387	25.85
Total for Mr Surgeon Trauma & Orthopaedi c			Sum	1,024.27
			Av g	146.32
			Count	7

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

File

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

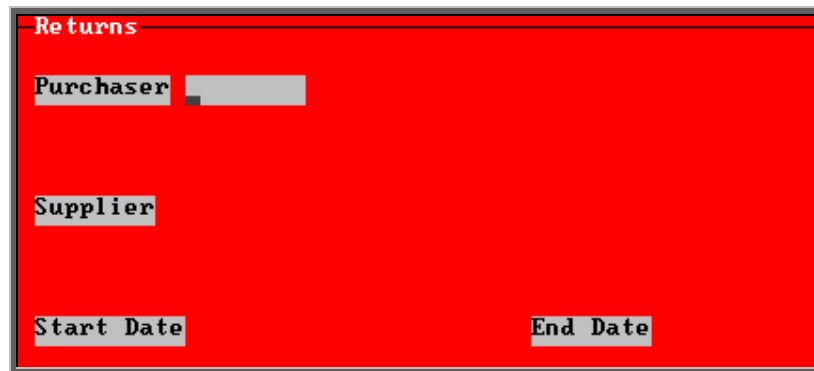


45. Financial report – Returns

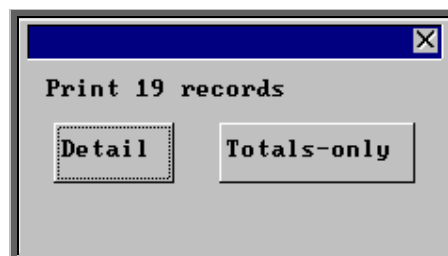
This report will show those orders that have been returned to the supplier and why. The report will show all orders that have been returned, regardless of whether a replacement has been booked in.

Menu: Reports – Financial – Batches – Returns or

Menu: History – Reports – Batches – Returns



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



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



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

Screen

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

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

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

Printer

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

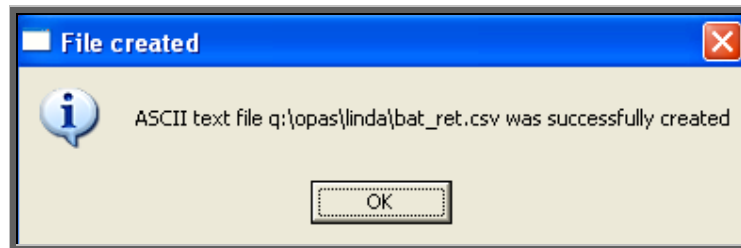
Below is an example of the **Returns** report.

Returns Report 01/04/2002 - 31/03/2003						
Date	Patient	Order	Supp	Description	OrthosisCode	Reason for return
13/05/2002	GI340163	G00343	075		AEC123	Goods faulty
13/05/2002	XYZ0987654	G00357	012	Shoes	999999	To be finished off
05/06/2002	XYZ0987654	G00357	012	Shoes	999999	To be finished off
10/05/2002	AEC21234	VM234	012	SHOES	AEC123	Different type of shoe needed
01/05/2002	W0FNE0W	G00359	078	Shoes	XYZ890	Heel to be altered
10/05/2002	W0FNE0W	G00359	078	Shoes	XYZ890	Fastener to be adjusted
20/05/2002	W0FNE0W	G00359	078	Shoes	XYZ890	The left shoe is rubbing
22/04/2002	XYZ0987654	G00358	087	Shoes and adaptions	999999	Patient doesn't like them
13/05/2002	XYZ0987654	G00358	087	Shoes and adaptions	999999	Arrived too late
01/06/2002	G0625852	G00368	096	testing	AEC123	Wrong size delivered
21/02/2003	G0418296	R000378	145	Shoes	AEC123	TESTING
28/02/2003	G0418296	R000378	145	Shoes	AEC123	Wrong goods sent
13/05/2002	G3355370	23456	158	Bra	999999	Wrong size sent
Total for Purchaser : 1						
Count 13						
13/05/2002	XYZ0987654	00339	078	Custom shoes	AEC123	Sole to be built up
Total for Purchaser : 54						
Count 1						

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

File

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

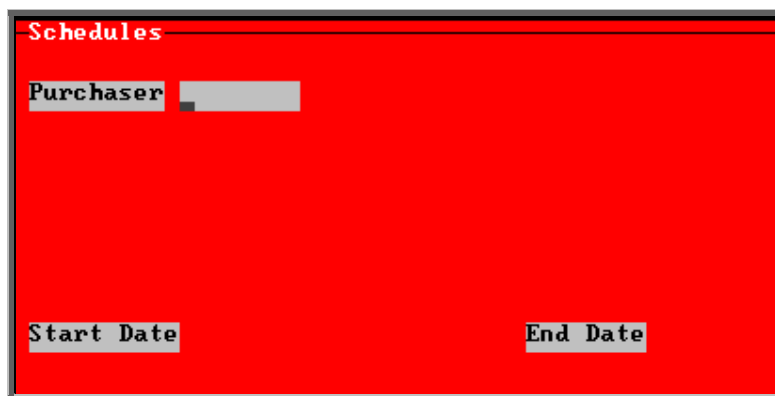


46. Financial report – Schedules

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

Menu: Reports – Financial – Batches – Schedules or

Menu: History – Reports – Batches – Schedules



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



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



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

Screen

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

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

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

Printer

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

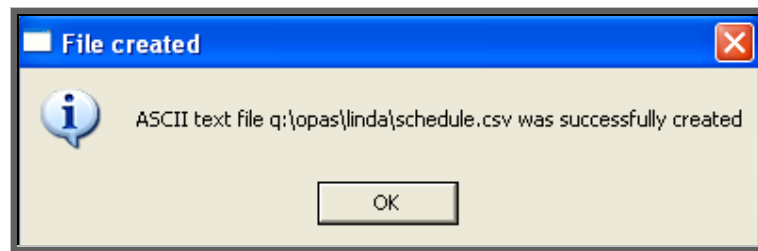
Below is an example of the **Schedules** report.

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

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

File

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

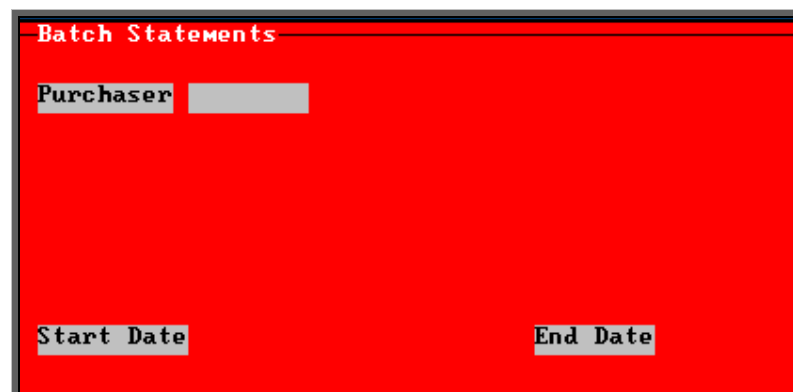


47. Financial report – Statements

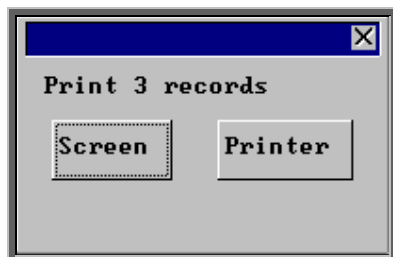
The **Statements** report shows purchase invoices raised within a specific period of time and also offers the option to print those invoices.

Menu: Reports – Financial – Batches – Statements or

Menu: History – Reports – Batches – Statements



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



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

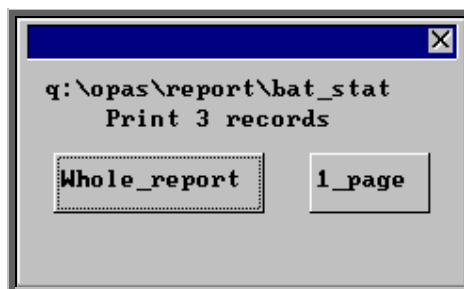
Screen

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

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

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

Printer



You are given the option to print the whole report, or to reprint one page again.

If **1_page** is selected, you will be asked at the bottom of the screen for the page number. If the Page number: is left blank, the whole report will be printed.

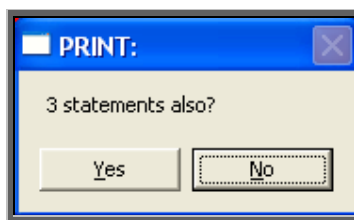


The report will be sent to the printer. You will then have the option to re-select Screen, Printer or File. Make another selection or press **Esc** again to return to the menu.

Below is an example of the **Statements** report.

NHS TRUST Invoice Statement Report 01/11/2003 to 01/11/2003						
Surname	Order No	Hospital No	Received Supplied	Practice	GP PCT	Cost
CRAVEN Shoes	G00370	TEMP000010	28/04/2003	Mr Surgeon	HIRST CI SE2	£302.00
Total for Mr Surgeon						£302.00
Count 1						

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



48. Financial report – Supplier Spend

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

Menu: Reports – Financial – Batches – Supplier Spend or

Menu: History – Reports – Batches – Supplier Spend

Supplier Spend

Purchaser:

Supplier

Start Date **End Date**

Using: **Ordered** **Received** **Supplied** **Invoiced** **Purchase_Invoice** **Paydate**

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the Supplier required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Supplier field empty will result in all suppliers being selected
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY
- select which date field (on the order) the date range above should be Using. Press the space bar to move the highlight onto the required option.

Which Supplier Spend Report?
Current selection has 14 records

Orthosis_codes **Directorate**

Select how you want the information to be analysed i.e. by **Orthosis_codes** or **Directorate**

Print 65 records

Detail **Totals-only**

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



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

Screen

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

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

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

Printer

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

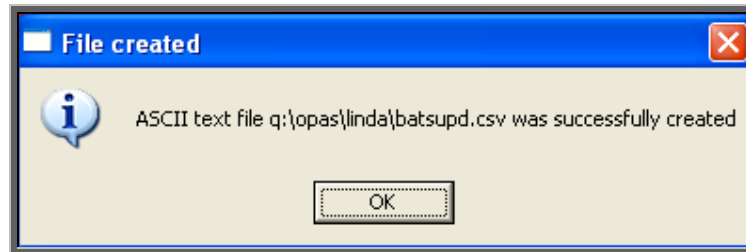
Below is an example of the **Supplier Spend** report selecting **Orthosis_codes**.

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

The report layouts (batsupc.dfr and batsupd,dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



49. Financial report – Wards

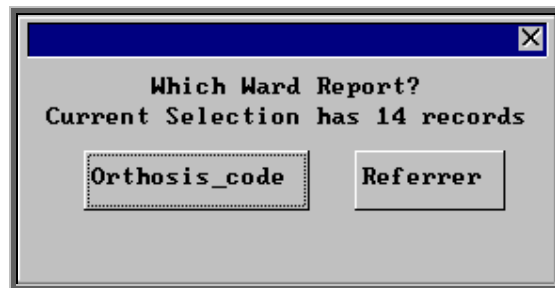
This report interrogates orders by the information held in the *Ward* field.

Menu: Reports – Financial – Batches – Wards or

Menu: History – Reports – Batches – Wards

Wards	
Purchaser	<input type="text"/>
Ward:	<input type="text"/>
Start Date	End Date
Using:	Ordered Received Supplied Invoiced Purchase_Invoice Paydate

- select the **Purchaser** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Purchaser** field empty will result in all purchasers being selected
- select the **Ward** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Ward** field empty will result in all wards being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select which date field (on the order) the date range above should be **Using**. Press the space bar to move the highlight onto the required option.



Select how you want the information to be analysed i.e. by **Orthosis code** or **Referrerr**



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



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

Screen

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

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

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

Printer

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

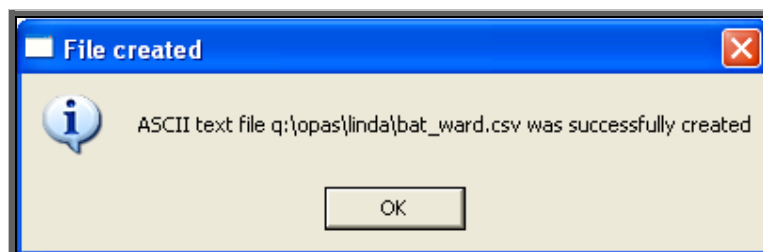
Below is an example of the **Ward** report selecting Orthosis_codes.

Barnsley District General Hospital Ward Report 01/01/2000-31/03/2003				
Order No	Orthosis Code	Ward	Consultant	Gross
G00350	999999	Ward 1	Mr Surgeon A N Q her	14.38
G00358				651.58
				Total 665.96
G00373	999999	Ward 3	Mr Surgeon	346.87
				Total for Orthosis Code: 999999 1012.83
			Count 3	
W1234	ABC123	Ward 1	Mr Surgeon	328.29

The report layouts (bat_ward.dfr and bat_ward2.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

File

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



50. Financial report – Workshop

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

Menu: Reports – Financial – Batches – Workshop or

Menu: History – Reports – Batches – Workshop



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



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

Screen

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

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

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

Printer

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

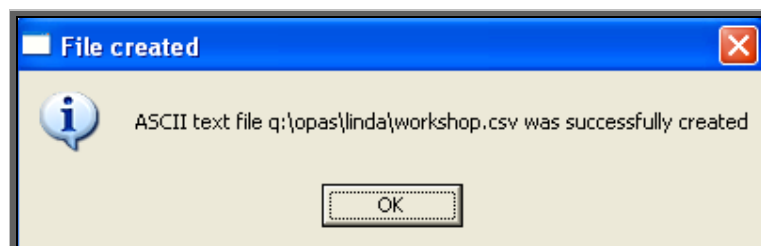
Below is an example of the **Workshop** report.

Order list for workshop orders supplied between 01/ 01/ 2000-31/ 12/ 2003 Printed 01/ 11/ 2003				
Hospital No	Order No	Supply Date	Technician	Time:
123456789	G00387	04/ 03/ 2003	BERT	
01232195	1234567	13/ 05/ 2002		
Total for BERT				0
Count				2
ABC21234	W1234	13/ 05/ 2002	FRED	
XYZ0987654	G00358	29/ 05/ 2002		
G0202344	G00351	13/ 05/ 2002		
Total for FRED				0
Count				3

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

File

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



51. Financial report – YTD (Year to Date)

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

Menu: Reports – Financial – Batches – YTD or

Menu: History – Reports – Batches – YTD

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

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

You will then be taken to the following selection screen:

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

OK to continue? ☐ No ☒ Yes

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

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

Cumulative orders

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

Not received

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

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

Not cleared

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

Cleared

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

Cleared this year

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

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

OK to continue

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



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

Screen

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

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

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

Printer

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

Below are examples of the YTD report.

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

New User NHS Trust						
Year To Date Summary Report						
Purchaser : NHS TRUST						
Printed : 30/08/2000						
	YTD (01/04/2000 - 31/07/2000)			Current month (Jul)		
	Orders	Net Value	Gross Value	Orders	Net Value	Gross Value
Cumulative Total Orders placed :	13	£1,116.39	£3,661.76	4	£1,915.29	£2,250.46
Goods ordered - not received :	2	£1,068.00	£1,254.90	2	£1,068.00	£1,254.90
Goods received - not cleared :	5	£1,312.74	£1,542.46	1	£519.00	£609.82
Goods received - cleared :	6	£735.65	£864.40	1	£328.29	£385.74

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

New User NHS Trust						
Year To Date Summary Report						
Purchaser : NHS TRUST						
Printed : 30/08/2000						
	YTD (01/04/2000 - 31/07/2000)			Current month (Jul)		
	Orders	Net Value	Gross Value	Orders	Net Value	Gross Value
Total Orders received :	11	£1,771.96	£2,082.06	2	£959.72	£1,127.67
Orders - not cleared :	5	£1,036.31	£1,217.66	1	£631.43	£741.93
Orders - cleared current :	2	£222.25	£261.15	0	£0.00	£0.00
Orders - cleared other :	4	£513.40	£603.25	1	£328.29	£385.74

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

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

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

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

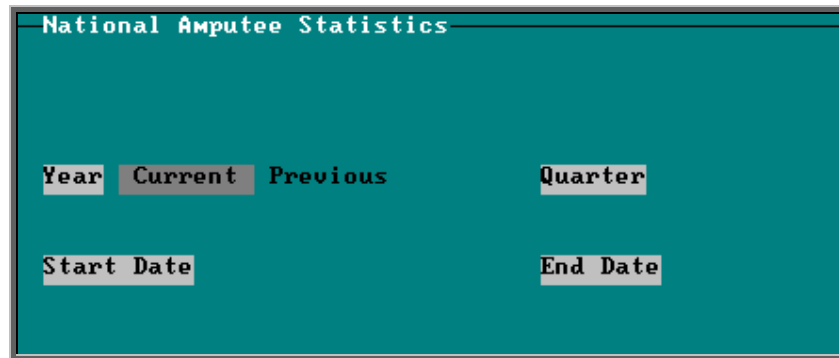
52. Patients reports (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 6 different batch reports analysing patient information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

53. Patients report – Amputee

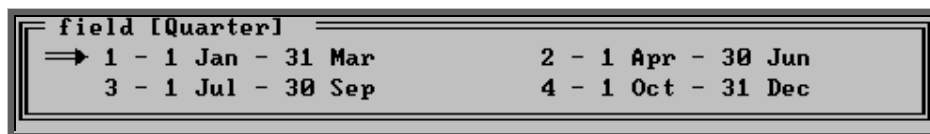
This screen is used to select the criteria for producing the National Amputee Statistics disk. Make sure you have a disk available before you continue.

Menu: Reports – Patients – Amputee



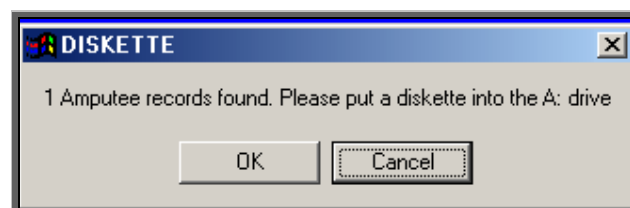
The screen titled "National Amputee Statistics" has a teal background. It contains five input fields: "Year", "Current", "Previous", "Quarter", "Start Date", and "End Date". The "Current" and "Previous" fields are highlighted with a grey background.

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

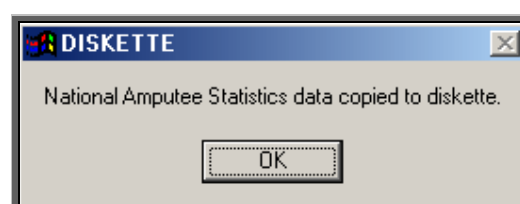


A pop-up list titled "field [Quarter]" showing four options: "1 - 1 Jan - 31 Mar", "2 - 1 Apr - 30 Jun", "3 - 1 Jul - 30 Sep", and "4 - 1 Oct - 31 Dec". The first option is selected with a right-pointing arrow.

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



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



54. Patients report – Conditions

This report provides a breakdown of patients marked with a specific medical condition.

Menu: Reports – Patients – Conditions

- select the Purchaser required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Purchaser field empty will result in all purchasers being selected
- select the Condition required from the pop-up list to find all those patients with that medical condition. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the Condition field empty will result in all patients registered in the period being selected regardless of a whether the patient has a condition
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY

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

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

Screen

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

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

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

Printer

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

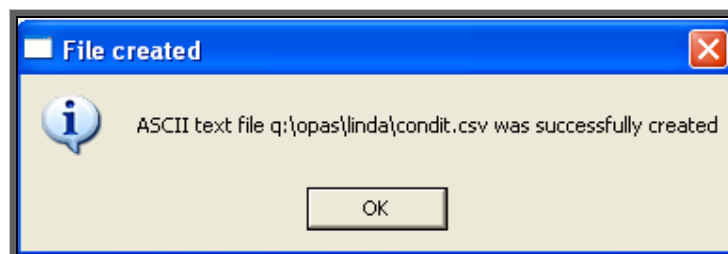
Below is an example of the Ward report selecting Orthosis_codes.

Patient Registration Report for			
01/ 01/ 2000 - 30/ 1			
Diabetic			
Hospital No	Surname	Forenames	Registered:
NAI R0000002	BLOGGS	FREDA	16/ 09/ 2002
NAH280965	BROWN	JAMES	15/ 04/ 2000
NG123456	COLE	JULIE	21/ 01/ 2001
NTBMP000012	DOE	JOHN	23/ 08/ 2000
NABC21234	EYES	TEE	19/ 02/ 2001
NG3355370	EYRE	DH	06/ 06/ 2001

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

File

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



55. Patients report – Ethnicity

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

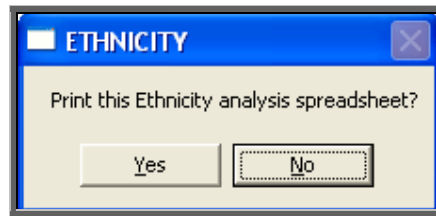
Menu: Reports – Patients – Ethnicity

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

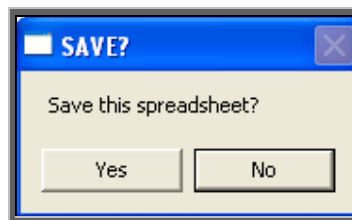
Below is an example of a spreadsheet produced by selecting the Ethnicity report

	1	2
1	Ethnicity analysis	
2	ALL PURCHASERS	
3	01/01/2000 - 06/07/2008	
4		
5	Ethnicity Code	Count
6	-----	-----
7		6
8	0	1
9	9	1
10	A	8,965
11	H	9
12	R	14
13	-----	-----
14		8,996.00
15		=====

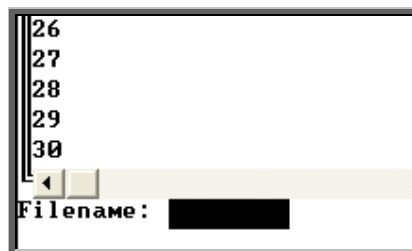
You will be asked if you wish to print the spreadsheet.



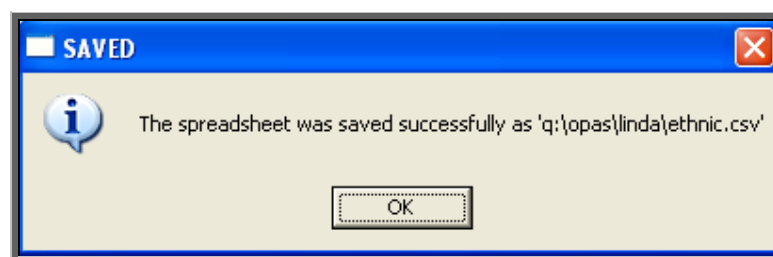
You will then be asked if you wish to save the spreadsheet.



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



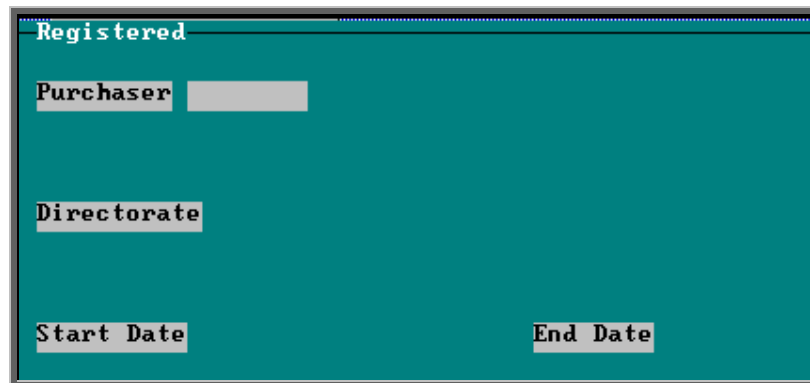
This will then be saved with that name within your personal directory of OPAS.



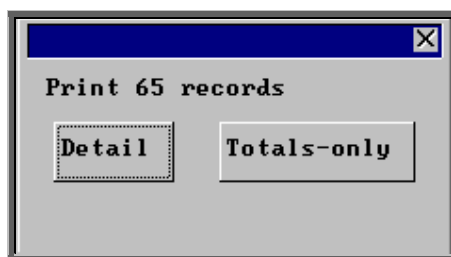
56. Patients report – Registered

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

Menu: Reports – Patients – Registered



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



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



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

Screen

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

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

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

Printer

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

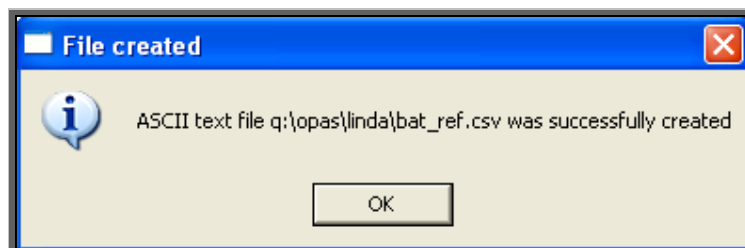
Below is an example of the **Registered** report.

Purchaser	Directorate	Hospital No	Surname	Registered:	GPR ref
Directorate Total Count 3		KL123456	VALE	29/ 04/ 2002	E629
		1134939	WATTERSON	08/ 10/ 2002	
		FRESC123	WHOSANE	05/ 11/ 2002	
PCT Directorate Total Count 3		G3221217	JONES	15/ 01/ 2001	G9310517
		G3373080	FREDRI CK	25/ 11/ 2002	G3399420
		G9809404	HALFH DE	25/ 11/ 2002	G3399420
Trauma & Orthopaedi c		FRED0123	BLOGGS	25/ 01/ 2000	
		TMP000005	BLOGGS	25/ 01/ 2000	
		98765TYU7	BLOGGS	11/ 04/ 2000	
		7654321	BLOGGS	11/ 04/ 2000	
		G8901446	YOUNG	28/ 09/ 2000	

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

File

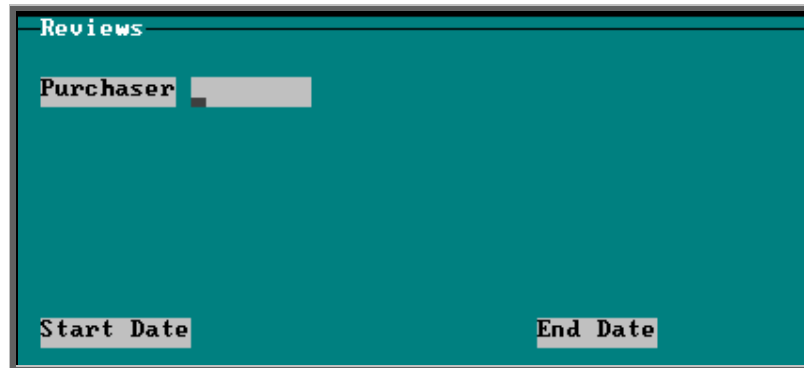
A comma separated variable file will be created called bat_ref.csv. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



57. Patient report – Reviews

This report will interrogate the *Review* field on the **Patient** screen to see who is due a review.

Menu: Reports – Patients – Reviews



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



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

Screen

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

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

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

Printer

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

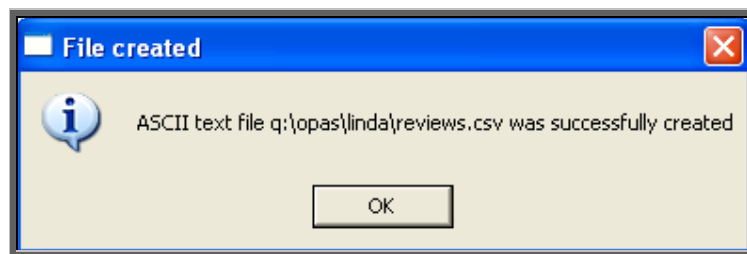
Below is an example of the **Reviews** report.

Patient Reviews 01/ 01/ 2008 - 31/ 01/ 2008						
Review	Hospital No	Surname	For enames	D O B	Sex	
04/ 01/ 2008	NTEBVP000007	MCANUS	LI BBY	11/ 11/ 1967	F	
15/ 01/ 2008	N121276QW	DONCHOE	LI NDA	12/ 12/ 1976	F	
16/ 01/ 2008	NTEBVP000012	DCE	JOHN	05/ 11/ 1947	M	
22/ 01/ 2008	NF381231	HEAVER	SYDNEY	25/ 01/ 1931	M	

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

File

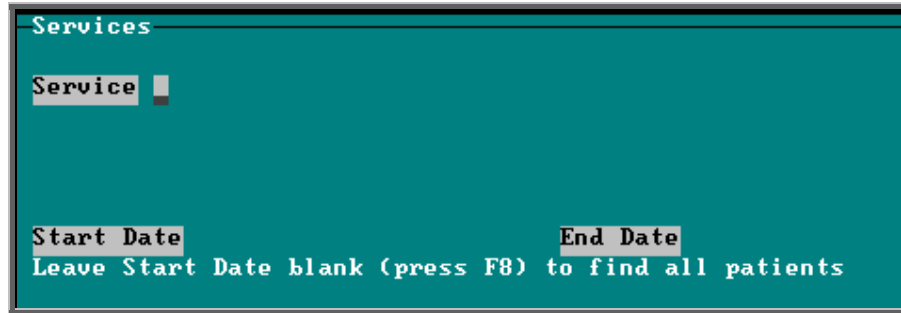
A comma separated variable file will be created called **reviews.csv**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



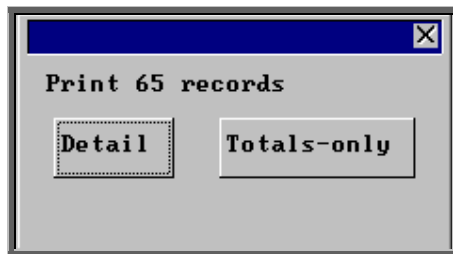
58. Patient report – Services

This report will interrogate patients using the *Service* field on the **Patient** screen.

Menu: Reports – Patients – Services



- select the Service required from the pop-up list.
- enter the Start date of the required date range in the format DD MM YYYY, or leave blank to find all patients assigned to the service selected
- enter the End date of the required date range in the format DD MM YYYY



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



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

Screen

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

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

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

Printer

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

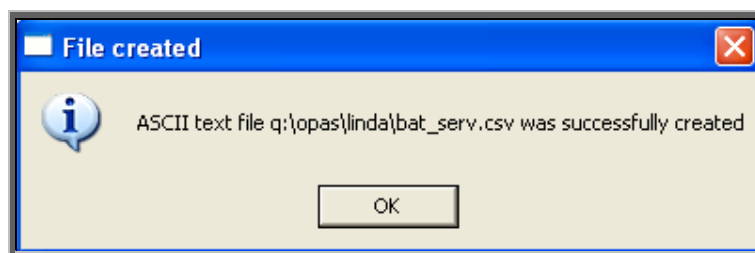
Below is an example of the **Services** report.

Patients Registered using Service: -				
O				
Hospital No	Title	For enames	Sur name	
N12345QWERTY	MR	KELVIN	BLOGGS	
NTORUS007	MRS	ELIZABETH	BUTCHER	
TMP000002	MR		MITH	
TORUS44	MISS	TESSA	SMITH	
448864	MISS	LISA	TARBUCK	

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

File

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



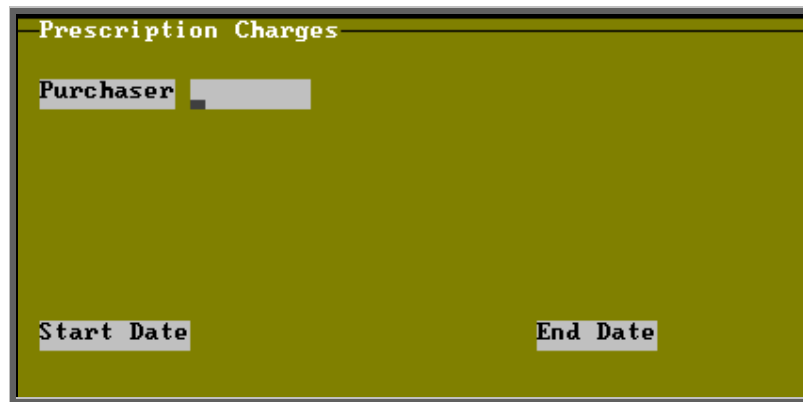
59. Prescriptions reports (Batches)

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

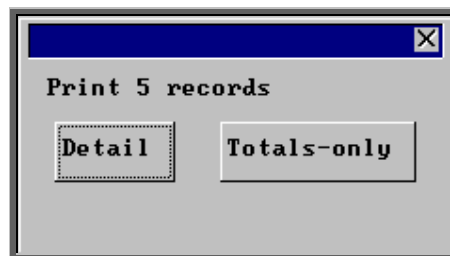
60. Prescriptions report – Charges

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

Menu: Reports – Prescriptions – Charges

The screenshot shows a window titled "Prescription Charges". Inside the window, there are three input fields: "Purchaser" at the top left, "Start Date" at the bottom left, and "End Date" at the bottom right. The "Purchaser" field has a small dropdown arrow next to it. The background of the window is olive green.

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

The screenshot shows a dialog box titled "Print 5 records". It contains two buttons: "Detail" and "Totals-only". The "Detail" button is highlighted with a dotted border.

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

The screenshot shows a dialog box titled "Print 5 records". It contains three buttons: "Screen", "Printer", and "File". The "Screen" button is highlighted with a dotted border.

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

Screen

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

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

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

Printer

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

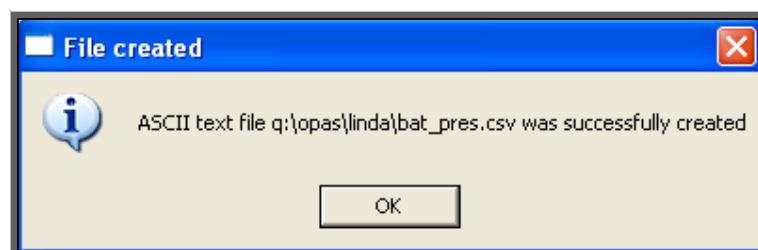
Below is an example of the **Charges** report.

Prescription Charges Collected 01/ 01/ 2001 - 31/ 12/ 2002					
Patient Name	Hospital No	Order No	Orthosis Code	Date of Order	Amount :
CH EYRE	G3355370	23456	999999	05/ 06/ 2001	12.10
JEANETTE HAMILTON	01232195	1234567		11/ 07/ 2001	12.10
MISS TESSA SMITH	TORUS004	G00373		14/ 08/ 2002	35.20
Total for Code					59.40

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

File

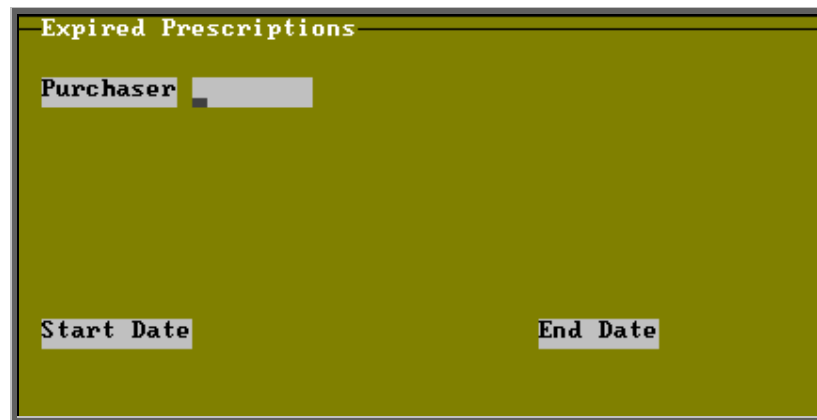
A comma separated variable file will be created called **bat_pres.csv**. This will be saved in your personal directory within OPAS. This can now be exported into Lotus123 or MS Excel.



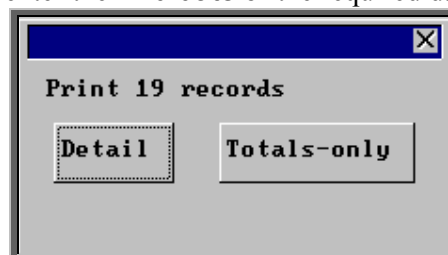
61. Prescriptions report – Expired

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

Menu: Reports – Prescriptions – Expired

A screenshot of a software window titled "Expired Prescriptions". The window has a green background. At the top, the title "Expired Prescriptions" is displayed. Below the title, there is a label "Purchaser" followed by a small rectangular input field. Further down, there are two labels: "Start Date" on the left and "End Date" on the right, each followed by a small rectangular input field.

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

A screenshot of a small dialog box titled "Print 19 records". It has a blue title bar with a close button (X). Below the title, there are two buttons: "Detail" and "Totals-only".

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

A screenshot of a small dialog box titled "Print 19 records". It has a blue title bar with a close button (X). Below the title, there are three buttons: "Screen", "Printer", and "File".

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

Screen

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

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

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

Printer

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

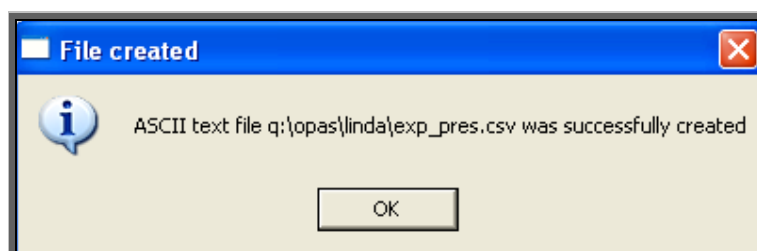
Below is an example of the **Expired** report.

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

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

File

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



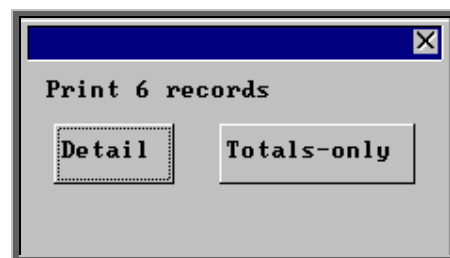
62. Prescriptions report – New

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

Menu: Reports – Prescriptions – New



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



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



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

Screen

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

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

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

Printer

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

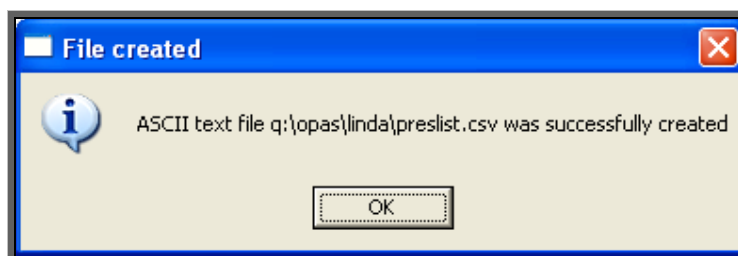
Below is an example of the **New** report.

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

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

File

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



63. Stock Control (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 4 different batch reports analysing stock control information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

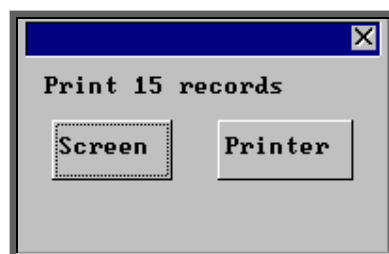
64. Stock Control – Creditors

This has the same purpose as the financial creditors report, in that it is finding those orders that have not been invoiced yet, but this report is looking at your stock purchase orders.

Menu: Reports – Stock – Creditors



Select which stock system the report is to be run for.



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

Screen

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

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

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

Printer

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

Below is an example of the **Creditors** report.

Stock Purchases System 1						
Orders Received but not invoiced						
Printed 02/ 07/ 2008						
Ordered	Received	Order No	Supplier	Net :	VAT :	Grand :
19/ 05/ 1998	25/ 08/ 2000	ST0011	012	28.70	5.02	33.72
06/ 08/ 1998	25/ 08/ 2000	ST0012	012	57.40	10.05	67.45
26/ 10/ 1999	25/ 08/ 2000	ST0013	012	20.00	3.50	23.50
25/ 08/ 2000	25/ 08/ 2000	ST0014	012	41.00	7.18	48.18
25/ 08/ 2000	25/ 08/ 2000	ST0015	012	20.50	3.59	24.09
25/ 08/ 2000	25/ 08/ 2000	ST0016	012	20.50	3.59	24.09
25/ 08/ 2000	11/ 10/ 2000	ST0017	012	61.50	10.76	72.26
10/ 10/ 2000	10/ 10/ 2000	ST0019	012	790.48	138.33	928.81
06/ 07/ 2004	Part only	ST0021	012	823.20	144.06	967.26
13/ 01/ 2008	13/ 01/ 2008	ST0024	001	12.34	2.16	14.50
13/ 01/ 2008	13/ 01/ 2008	ST0025	001	12.34	2.16	14.50
13/ 01/ 2008	13/ 01/ 2008	ST0026	001	12.34	2.16	14.50
13/ 01/ 2008	20/ 04/ 2008	ST0027	001	61.70	10.80	72.50
06/ 02/ 2008	Part only	ST00191	012	340.20	59.54	399.74
19/ 04/ 2008	02/ 07/ 2008	ST0028	012	170.10	29.77	199.87
Grand Total				2,472.30	432.66	2,904.96

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

65. Stock Control –Lowstock

This prints a list of stock items that are at or below the minimum stock levels. A separate page will be produced for each supplier to make purchasing of replacement stock easier.

Menu: Reports – Stock – Low Stock



Select which stock system the report is to be run for.



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

Screen

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

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

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

Printer

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

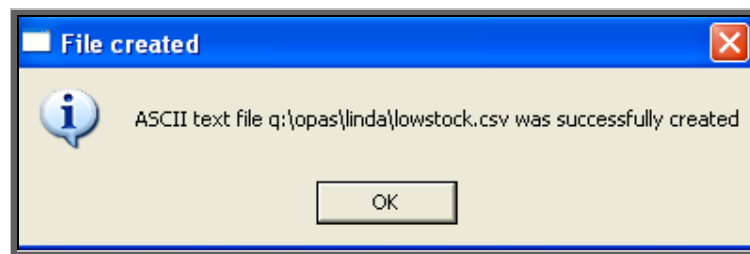
Below is an example of the **Low Stock** report.

Stock (1) at or below minimum level for :						
001 Arden Orthotics						
Lowstock Report						
Stock System 1						
Stock No:	Schedule:	Stock:	Minimum:	Maximum:	Reorder:	On Order
Description:						
TTT111	A1a	-1	1	1	1	

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

File

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



66. Stock Control –Progress

This report interrogates your Stock Purchase Orders and finds those that have not yet been received.

Menu: Reports – Stock – Progress

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

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

Below is an example of the **Progress** report.

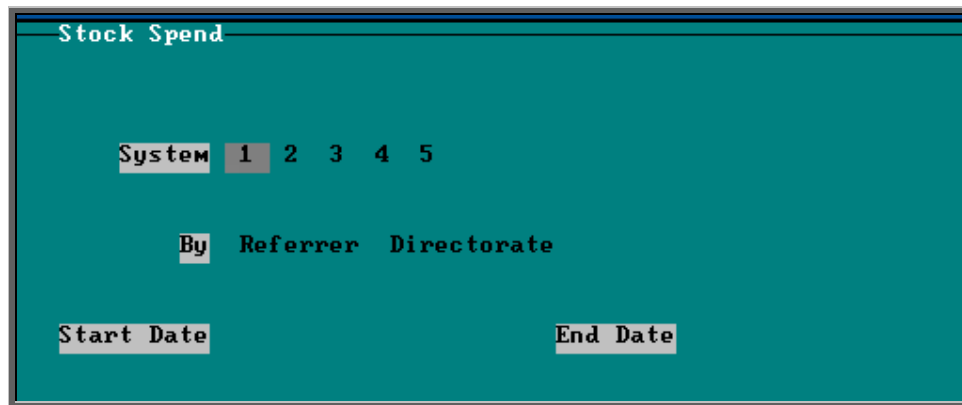
Stock Progress - System 1					
ALL SUPPLIERS					
01/01/2000 - 05/06/2008					
Supplier	Order Date	Order No	Stock No:	Description:	Qty:
Arden Orthotics	04/06/2008	ST0029	TEST	TEST	25
Halo Healthcare Ltd	06/02/2008	ST00181	SCL	Soft Collar, large	10
Halo Healthcare Ltd	06/02/2008	ST00181	SCM	SOFT COLLAR MEDIUM	10

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

67. Stock Control – Spend

This report lists items that have been supplied.

Menu: Reports – Stock – Spend



- select the Stock System required
- select whether the report should be analysed by Referrer or Directorate
- enter the Start date of the required date range in the format DD MM YYYY
- enter the End date of the required date range in the format DD MM YYYY



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

Below is an example of the **Spend** report selecting Referrer.

Stock Spend Report - Stock System 1 02/01/2008 - 31/01/2008 By Referrer				
Referrer	Date:	Patient	Stock No:	Price
	13/01/2008	BFTRDSX1457	TEST	12.34
	13/01/2008	NG0325118	TEST	12.34
	Total			24.68
Mr Surgeon	10/01/2008	NX232323	TEST	12.34
	13/01/2008	NG0325228	TEST	12.34
	Total			24.68
Direct Access GP	10/01/2008		STM25X16A	12.34
	10/01/2008		TEST	12.34
	13/01/2008	NS7654321	TEST	12.34
Total				37.02
Grand Total				86.38

The report layouts (st_sp_co.dfr and st_tr_di.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

68. Waiting List (Batches)

Batch reports are report templates that are designed to be quick and easy to run. There are currently 2 different batch reports analysing waiting list information. If you are in any doubt as to which report will produce the information required, please contact the OPAS Helpdesk for guidance. The layout of all batch reports can be edited to suit your requirements.

69. Waiting List – Archived

This report interrogates the archived waiting list. The archived waiting list contains those patients that have been removed from the current waiting list (this can be because they have been given/attended/DNA'd an appointment or have been manually deleted from the list) and archived ([see Waiting List - Note 9. Archiving the Waiting List](#)).

Menu: Reports – Waiting List – Archived

Archived Waiting List Report

Purchaser

Type

Orthosis Code

Referrer

Venue

Start Date **End Date**

Using: ☐ **Added:** ☐ **Referred:** ☐ **Removed:** ☐

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

- select the **Referrer** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Referrer** field empty will result in all referrers being selected
- select the **Venue** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Venue** field empty will result in all venues being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select whether the date range entered should look at the **Added:**, **Referred:** or **Removed:** date on the waiting list screen



You will be shown how many waiting list entries OPAS has found and ask if you want to see the information in **Detail** i.e. a line for each waiting list entry or just **Totals-only**



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

Screen

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

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

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

Printer

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

Below is an example of an **Archived** report in **Detail**.

All Purchasers					
Added: 01/ 05/ 2008 - 26/ 06/ 2008					
Hospital No	Sur name	Added:	Removed:	Days:	Reason:
TCRUS44	SMITH	02/ 05/ 2008	03/ 06/ 2008	32	Attended Appointment
NTBVP000012	DCE	16/ 05/ 2008	27/ 05/ 2008	11	Attended Assessment Appointment
NG0108922	ASHER	25/ 05/ 2008	25/ 06/ 2008	31	Appointed
NF381231	HEAVER	27/ 05/ 2008	02/ 06/ 2008	6	Appointment made
NG0416854	DOWNEY	28/ 05/ 2008	29/ 05/ 2008	1	Attended Appointment
TCRUS44	SMITH	04/ 06/ 2008	19/ 06/ 2008	15	DNA

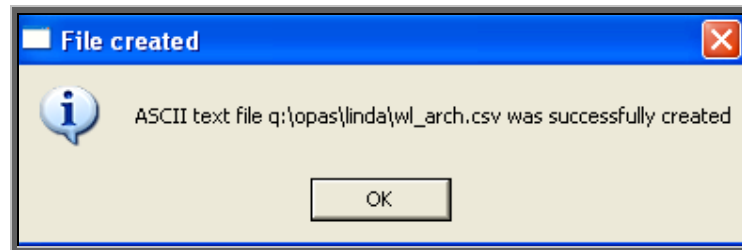
Below is an example of an **Archived** report in **Totals_only**.

Hospital No	Sur name	Added:	Removed:	Days:
Average for Purchaser				198
Count				53
Average for Purchaser NHS TRUST				16
Count				32
Average for Purchaser GP Fundholder				2
Count				1
Grand Total Average				128
Count				86

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

File


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



70. Waiting List – Current

This report interrogates your current waiting list i.e. all those patients still on the waiting list.

Menu: Reports – Waiting List – Current



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

- select the **Type** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Type** field empty will result in all types being selected
- select the **Orthosis Code** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Orthosis Code** field empty will result in all orthosis codes being selected
- select the **Referrer** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Referrer** field empty will result in all referrers being selected
- select the **Venue** required from the pop-up list. Alternatively press **Esc** to make the pop-up list disappear without making a selection. Leaving the **Venue** field empty will result in all venues being selected
- enter the **Start date** of the required date range in the format DD MM YYYY
- enter the **End date** of the required date range in the format DD MM YYYY
- select whether the date range entered should look at the **Added:** or **Referred:** date on the waiting list screen



You will be shown how many waiting list entries OPAS has found and ask if you want to see the information in **detail** i.e. a line for each waiting list entry or just **Totals-only**



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

Screen

If the report is sent to the screen, you will initially be shown the first page of the report. Press the **F6** key to move to the next page. **F5** will go back a page. If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.

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

Printer

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

Below is an example of a **Current** report in **Detail**.

NHS TRUST						
Added: 01/ 01/ 2000 - 26/ 06/ 2008						
	Hospital No	Surname	Added:	Priority:	Days:	Description:
1	NTORUS0077	SELBY	08/ 04/ 2008	395	79	Custom Foot wear
1	NG0816485	HABIBIS	13/ 02/ 2008	134	134	Custom Foot wear
1	NG0417666	DAVISON	03/ 06/ 2008	115	23	Custom Foot wear
1	NG0230557	BEGG	05/ 06/ 2008	105	21	Custom Foot wear
1	TVP000023	LARGE	05/ 06/ 2008	105	21	Custom Foot wear
1	NAB123456	SHIEL	06/ 06/ 2008	100	20	Custom Foot wear
1	NAH280965	BROWN	06/ 06/ 2008	100	20	Custom Foot wear

Below is an example of a **Current** report in **Totals_only**.

tal	No	Surname	Added:	Priority:	Days:
Average for Purchaser NHS TRUST					33
Count					23
Average for Purchaser GP Fundholder					48
Count					2
Average for Purchaser Primary Care Group					67
Count					1
Grand Total Averages					35
Count					26

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

File

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

