



Orthotic Patient Administration System

Getting Started

Version 7

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OPAS – Getting Started

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

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Introduction

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Introduction

1. The Manual

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

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

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

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

2. Conventions

- Options to be selected from the main menu are shown like this.
- Options to be selected from the top of the screens or in pop-up boxes are shown like this.
- *Field names are shown like this.*
- Keys, which are to be pressed, are shown like this: **Enter**
Thus you would press the **Enter** key, not type the word Enter.
- Key-presses shown like this: **Ctrl-Enter** indicate that the first key is held down, then the second key is pressed briefly, then the first key is released.
- clicking with the mouse is always the left mouse button unless otherwise stated.

3. Training

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

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

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

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

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

- **Appointments**

- Setting up clinic details
 - Creating clinic dates
 - Making and updating appointments

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

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

- **Stock Control**

- Setting up stock items
 - Ordering stock
 - Maintaining stock levels

- **Reports**

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

If after the two training sessions you are still unsure and need further training, please contact Wynnldodge to discuss further training requirements. We recommend training to be taken in half-day sessions.

4. OPAS Helpdesk 01904 492425

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

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

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

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

- messages and prompts appear throughout the system and if you are unsure at any point, firstly look at the bottom left corner of the screen to see if a message or prompt is visible that will help you. **Please make a note of any error messages**, and what you were doing when the errors occurred. This is vital information if the support desk is to understand the problem.
- look in this manual in the relevant section to check that you have followed the correct procedure
- quit out of OPAS back to the operating system (e.g. the Windows desktop), then run OPAS again and see if the problem has disappeared
- quit out of OPAS back to the operating system (e.g. the Windows desktop), shut down the computer, wait for one minute, switch the computer on again, run OPAS again and see if the problem has disappeared.

5. Backups

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

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

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

6. Contact summary

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

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

7. Copyright

The Orthotic Patient Administration System, including this manual, is copyright © Wynnllodge Limited.

Moving around OPAS

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- 2. Box menus**
- 3. Icons**
- 4. Pull-down menus**
- 5. Pop-up menus**
- 6. Standard menu options**
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- 8. Moving around records**
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Moving around OPAS

1. Logging on



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

When you double click on the OPAS icon you will be asked for your User ID. During the 'Familiarisation session' each person who needs to use the system will have been set up as a user. User names must be unique and unless you have asked otherwise we will have set them up to be your forename. (New members of staff will need to be set up in **Utilities – Users**. [See Utilities – Note 25. Users](#))

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

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

Type in your password and press **Enter**

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

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

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

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

Training Area

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

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

2. Box menus

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



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

pressing the first letter of that item on the keyboard:

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

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

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

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

3. Icons

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



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

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

If you are not sure what a particular icon does:

- move the cursor onto the icon with the mouse

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

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

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

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

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

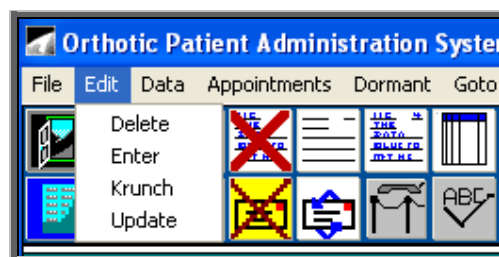
The icons on any particular screen give access to the more common actions available from that screen, but all the actions can be selected from the pull-down menus above the icons.

4. Pull-down menus

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



To select a pull-down menu item with the mouse, move the tip of the cursor arrow onto that word and single click with the left mouse button. Some of the items carry out that action immediately while others show a sub-menu, from which you select the required item in the same way.



If you prefer not to use the mouse you can select options from the pull-down menu using the keyboard.

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

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

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

5. Pop-up menus

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

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

(N.B. Where pop-up menus appear automatically can be controlled by you within **Utilities – Choices – Defaults** – [see Utilities - Note 3. Choices - Defaults](#))

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

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

All pop-up menus work in the same way.

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

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

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

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

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

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

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

6. Standard menu options

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

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

the icon (if any)

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

the key press (if any)

Exit



File, Exit

Esc

or

single click anywhere on the screen with the right mouse button

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

Enter



Edit, Enter

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

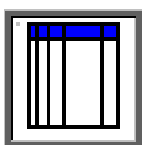
Update



Edit, Update

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

Browse



Data, Browse

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

Orthotic Patient Administration System			
File Edit Data Appointments Care Copies Dormant History Mailing Notes Paslink Prescriptions Sort This			
Surname	Forenames	Hospital No	Address
HERRIOT	JAMES	4454544	21 James St
DOE	JOHN	TEMP000012	Room 101
AIR	JANE	AIR0000001	44 Longley Road
BLOGGS	FREDA	AIR0000002	12 Set Street
CRESSWELL	JANINE	TEMP000013	5 Thomas Street
LAWSON	KATHRYN	TMP000002	22 Railway Cuttings
HEAUER	SYDNEY	S7654321	70 HARTOPP ROAD
SALBY	JACQUELINE	H123456	2 HAUMERE DRIVE
HEAUER	SYDNEY	F381231	70 HARTOPP ROAD
SALBY	JACQUELINE	F378833	2 HAUMERE DRIVE
PARGETTER	ELISABETH	TMP000003	LOWER LOXLEY HALL
GREENAWAY	JENNIFER	1464094N	12 DENBIGH DRIVE
MCLACHLAN	SARAH	TMP000004	1755 ROBSON STREET
SMITH	JOHN	20123456	WITHINS NURSING HOME
JONES	AARON	00361807	4 CHILHAM ST
JONES	AARON	01720674	36 CARLTON RD
TWEMLOW	ANGELA MARY	01683195	55 KILSBY CLOSE
HAMILTON	JEANETTE	01232195	4 MACKENZIE GROVE
FRENCH	TERRY	X232323	23 HENRY STREET
JONES	FRANK	565653	28 HUMBER ROAD

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

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

Patients									
Current Care Episode Exists									
Registered: 25/02/2000 By ROOT					Last Update: 07/06/2008 By ROOT				
Hospital No N4454544					NHS No 999-999-9999 D O B 11/11/1924 age 83				
Title MR		Forenames JAMES		Surname HERRIOT		Sex M		Ethnicity	
Address 21 James St					Mailing 21 James St				
Town Jamestown					Address Jamestown				
County Middlesex					Middlesex				
Post Code JT1 2ER					JT1 2ER				
Home Phone 01234 567890					Mobile:				
Work Phone 01234 654321					Fax:				
Email james.herriot@hotmail.com					GP: GIBSON PW				
					Notes:				
					Service 0				
					Elements 0				
					PCT 5M6				

Find



Data, Find

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

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

Orthotic Patient Administration System - Logged in as						
Hospital_No	NHS_No	D_O_B	Surname	Shortname	Post_Code	

Select the field you want to search on: for instance, if you want to find a patient and you know their Hospital Number but not their Surname, you would select Hospital_No.

Enter the Hospital No you would like to find:	
<input type="text"/>	
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

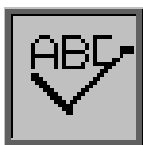
Then type the data you want to find and select OK by clicking on the OK button with the mouse or by pressing **Enter** twice.

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

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

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

Sort



Sort

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

When you select Sort you will be asked the field you wish to sort by. The specific fields shown depend on the screen you are using at the time (Patients, Orders etc).

Select the field you want to sort on: for instance, you may want to put the patients into order by Surname. You are then given three options.

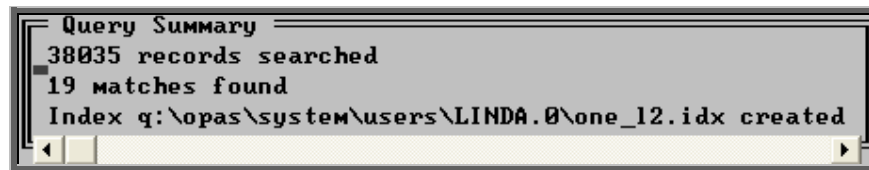
Whole_File puts the whole database into order: this is the option you would normally select

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

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

after **C** in the alphabetical list of patients, e.g. **CHARLES** will not be included.

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



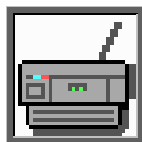
Press **Esc** to remove the Query Summary box. Any reports or letters produced now will only include those in the index created.

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

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

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

Print



File, Print

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

Delete



Edit, Delete

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

Clinicians

Reference 8

Name Mr B Fitter

Expertise **Orthotics** Prosthetics Both

Source

Fee

m: orthists.ow Key:Reference Window:1 Rec: 8 (8) DEL

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

or by showing a message on the screen

Patients

This patient has been deleted Registered: 12/08/1998 By

Last Update: 14/06/2008 By

Hospital No NTMP000004 NHS No D O B

Title Forenames Surname D O D

MISS SARAH MCLACHLAN Sex

Address 1755 ROBSON STREET Mailing 1755 ROBSON ST

Address

Town VANCOUVER VANCOUVER

County BC, CANADA BC, CANADA

Post Code U6G 3B7 U6G 3B7

Home Phone 001 604 654 2929 Mobile:

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

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

7. Standard Keys

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

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

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

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

8. Moving around records

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



Moves to the next record **F6**



Moves to the previous record **F5**



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



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



Page up **PgUp**



Page down **PgDn**

9. Tables

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

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

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

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

10. Printing reports to screen

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



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

New User NHS Trust Amount Spent by Cost Code 01/01/2000 to 31/10/2000					
Supplier	Cost Code	Order No	Patient	Sup. Inv. No	Gross
001	ABC123	G00284	BLOGGS	545456456	■258.08
Total for Code					Sum ■258.08
					Avg ■258.08
Count					1
Total for Supplier					Sum ■258.08
					Avg ■258.08
Count					1
008	999999	PCG00325	CREADY	123456789	■36.82
Total for Code					Sum ■36.82
					Avg ■36.82
Count					1
ABC123	G00269	BAKER	1234567	■258.74	
Total for Code					Sum ■258.74
					Avg ■258.74
Count					1
Total for Supplier					Sum ■295.56
					Avg ■147.78
Count					2
013	999999	G00266	JACK	EERHERWER	■40.60
	G00273	NICHOLSON	34567	■116.40	
Total for Code					Sum ■157.00
					Avg ■78.50
Count					2
betanupca.dfr					

The following keys can be used:

F5 shows the previous page

F6 shows the next page

F7 reduces the magnification

F8 increases the magnification

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

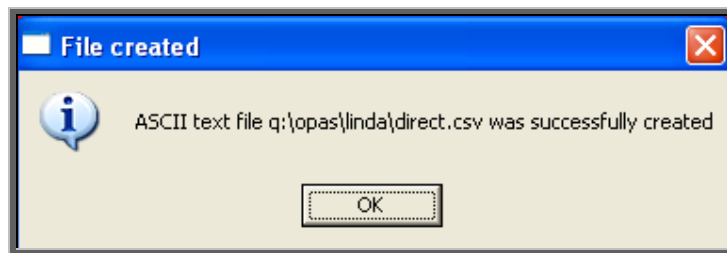
When you have finished, press **Esc**. This will take you back to the choice of printing to screen, printer or file; so if required you could now print that report to the printer.

11. Saving reports to file

Most reports within OPAS can be saved to a file.



If you select File, a comma separated variable file will be created.

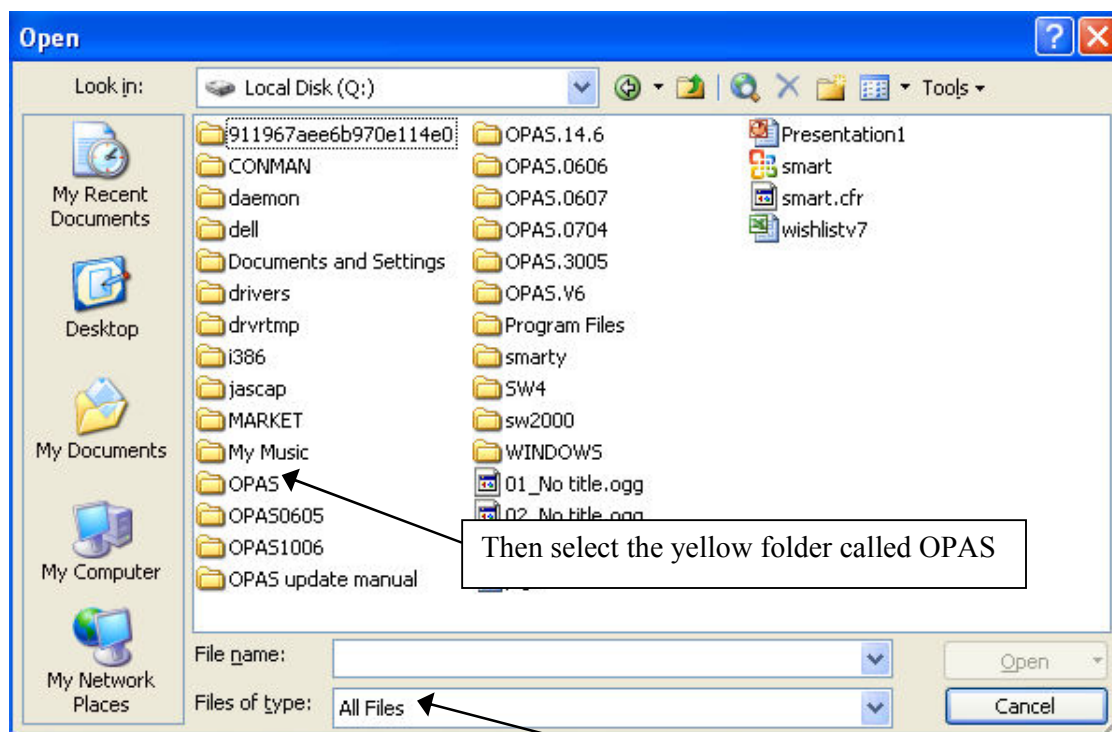
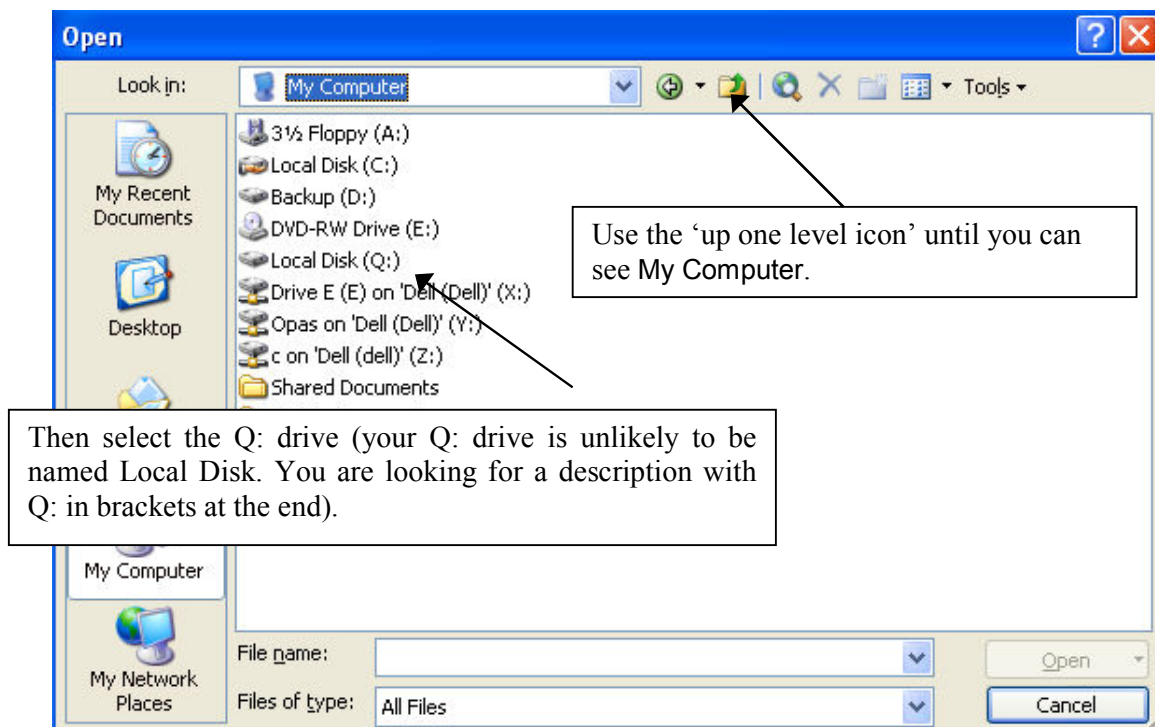


The file will always be saved in your personal directory within OPAS (i.e. Q:\OPAS\username), but the file name will be different for each report.

This can now be exported into Lotus123 or MS Excel or sent as an attachment in email.

Opening a report file in MS Excel

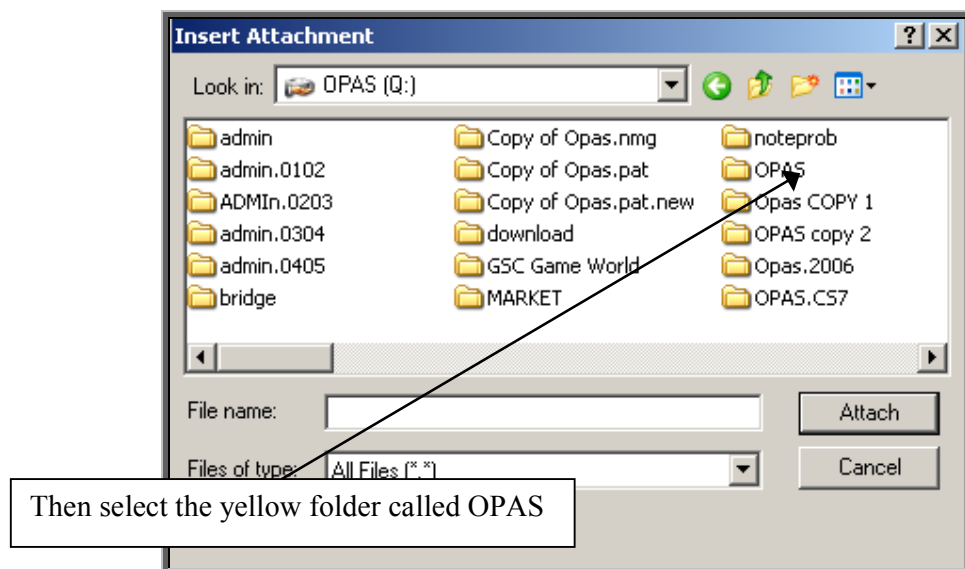
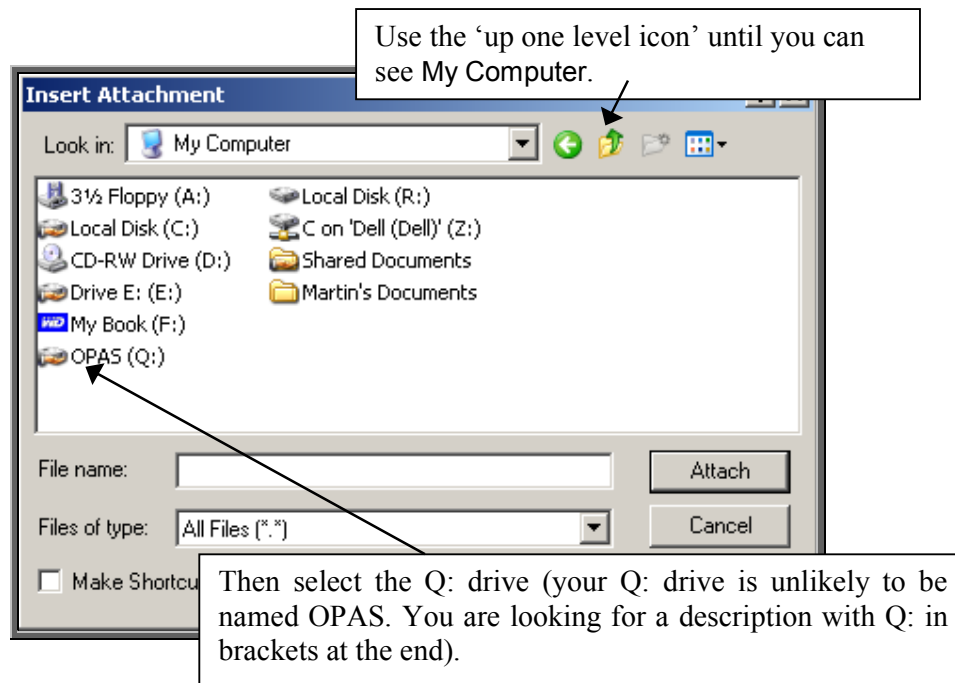
Within MS Excel select File, Open from the menu at the top of the screen.



Then select your personal folder (i.e. your name). Ensure that All Files is selected, and then you will be able to see and choose the report file to be opened.

Attaching to an email

To send a report file as an attachment in email, create an email message to the person concerned and then click on 'add attachment' (you may have a big paper clip icon instead).



Then select your personal folder (i.e. your name). You should then be able to see the report file to attach to your email.

Patients

- 1. Introduction**
- 2. Entering a new patient**
- 3. Finding a patient's record**
- 4. Amending a patient's record**
- 5. Changing the mailing address**
- 6. Deceasing a patient**
- 7. Deleting a patient**
- 8. Printing options**
- 9. Prescriptions**
- 10. Adding a care episode**
- 11. Waiting List**
- 12. Adding an order**
- 13. Re-printing individual orders**
- 14. Re-faxing individual orders**
- 15. Entering medical notes**
- 16. Verifying notes**
- 17. Printing medical notes**

18. Printing HSA5/WF1 forms

19. GP's

1. Introduction

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

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

Patients	Care Episodes
Orders	Contacts
Notes	Patients to the waiting list
Prescriptions	

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

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

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

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

Patient Screen

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

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



Patient Screen (Long)

Orthotic Patient Administration System - Logged in as LINDA at 16:10 on 15/06/2008

File Edit Data Appointments Dormant Goto Mailing Message Paslink Sort This

Patients

Current Care Episode Exists

Registered: 25/02/2000 By ROOT
 Last Update: 07/06/2008 By ROOT

Hospital No N4454544 NHS No 999-999-9999 D O B 11/11/1924 age 83

Title Forenames Surname D O D
 MR JAMES HERRIOT Sex M Ethnicity

Address 21 James St Mailing 21 James St
 Address DOR YAD
 YAD

Town Jamestown
 County Middlesex
 Post Code JT1 2ER

Home Phone 01234 567890 Mobile:
 Work Phone 01234 654321 Fax:
 Email james.herriot@hotmail.com GP: GIBSON PW
 G9003459

Purchaser 1 NHS TRUST
 ConsRef: 2 Clinician
 Referrer Direct Access GP Directorate PCT

Private Patient N Inpatient N Transport No transport required
 Exempt: Until: Review

Notes:
 Service 0
 Elements 0
 PCT 5M6

Earliest: 10:00:00
 Latest: 15:00:00

Weight:
 Height:
 Activity:
 Ward:

Occupation **Waiting List**

All patient notes MUST be treated as confidential

Medical Notes

Date	Notes	Category
07/06/2008	Appt cancelled. Session: 3298 @ 10:45 on 10/06/2008	Audit
26/11/2007	Appt cancelled. Session: 2767 @ 11:00 on 03/12/2007	Audit
25/11/2007	Appt cancelled. Session: 2870 @ 11:00 on 02/01/2008	Audit

Orders

Date of Or	Order No	Sup	Desc	Received	Supplied
13/01/2008	PA00048	888	Shoes	13/01/2008	13/01/2008
01/12/2007	PA00035	078	Repairs		
30/11/2007	PA00033	001	Shoes	13/12/2007	

Appointments

Date:	Day	Time:	At:	With:
17/06/2008	Tue	10:00	Orthotic Clinic	Mrs Orthotiste

DNAs

On:	At
17/06/2008	10:00:00
17/06/2008	10:00:00
17/06/2008	10:00:00

DNAs 3

Addresses

Add:	PC:

Carbon Copies

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

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

Each user can choose which summary tables are seen on the 'long' version of the **Patient** screen, by selecting which screen template they want to use. How to do this is explained later in this introduction.




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



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

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

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

Medical Notes		(Goto, <u>N</u> otes)
Orders		(Goto, <u>H</u> istory, <u>C</u> urrent)
Appointments		(A <u>p</u> pointments, <u>C</u> urrent)
Archived Appointments		(A <u>p</u> pointments, <u>A</u> rchived)

Prescriptions (Goto, Prescriptions)

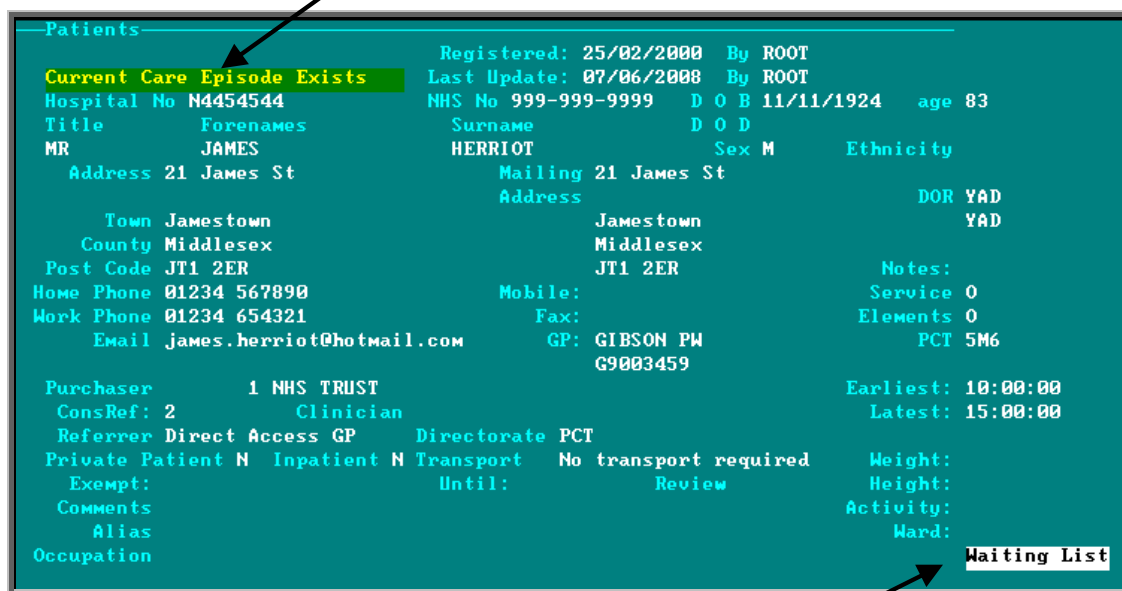
Mobility  (Goto, Mobility)

DNA's (Goto, DNAs)

Carbon Copies (Goto, Copies)

Address history (Goto, Addresses)

The **Patient** screen will also indicate if the patient has a current care episode or if they are on the waiting list.



Patients

Registered: 25/02/2000 By ROOT
Last Update: 07/06/2008 By ROOT

Hospital No N4454544 NHS No 999-999-9999 D O B 11/11/1924 age 83

Title Forenames Surname D O D
MR JAMES HERRIOT Sex M Ethnicity

Address 21 James St Mailing 21 James St
Address DOR YAD
Town Jamestown Jamestown YAD
County Middlesex Middlesex
Post Code JT1 2ER JT1 2ER

Home Phone 01234 567890 Mobile: Notes:
Work Phone 01234 654321 Fax: Service 0
Email james.herriot@hotmail.com GP: GIBSON PW Elements 0
G9003459 PCT 5M6

Purchaser 1 NHS TRUST Earliest: 10:00:00
ConsRef: 2 Clinician Latest: 15:00:00

Referrer Direct Access GP Directorate PCT

Private Patient N Inpatient N Transport No transport required Weight:
Exempt: Until: Review Height:
Comments Activity:
Alias Ward:
Occupation Waiting List

Below are the icons and menu options for accessing these from the **Patients** screen.

Care Episodes  (Goto, Care, Current)

Waiting List  (Goto, Waiting List, Current)

Patient Screen (Short)

Orthotic Patient Administration System - Logged in as LINDA at 16:10 on 15/06/2008

File Edit Data Appointments Dormant Goto Mailing Message Paslink Sort This

Patients

Current Care Episode Exists

Registered: 25/02/2008 By ROOT
Last Update: 07/06/2008 By ROOT

Hospital No N4454544 NHS No 999-999-9999 D O B 11/11/1924 age 83

Title Forenames Surname D O D
MR JAMES HERRIOT Sex M Ethnicity

Address 21 James St Mailing 21 James St
Address DOR YAD
YAD

Town Jamestown
County Middlesex
Post Code JT1 2ER

Home Phone 01234 567890 Mobile:
Work Phone 01234 654321 Fax:
Email james.herriot@hotmail.com GP: GIBSON PW
G9003459

Purchaser 1 NHS TRUST
ConsRef: 2 Clinician
Referrer Direct Access GP Directorate PCT

Private Patient N Inpatient N Transport No transport required
Exempt: Until: Review

Comments
Alias
Occupation

Notes:
Service 0
Elements 0
PCT 5M6

Earliest: 10:00:00
Latest: 15:00:00

Weight:
Height:
Activity:
Ward:

Waiting List

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

Selecting 'long' Patient screens

Go into **Utilities – Choices – Patients – Interface**.


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

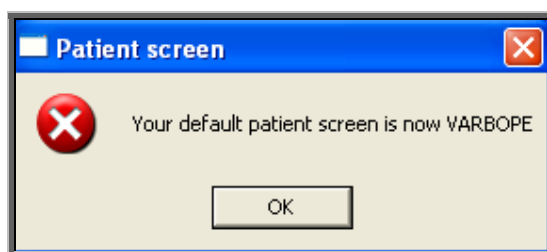
This screen summarises the screens, showing which tables are included.

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

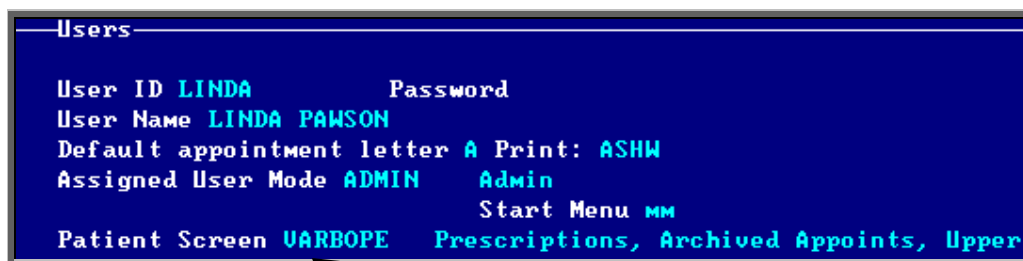
To help you choose which screen to use, highlight an option and click on View at the top of the screen to see what it would look like.

Note: If you want to use prescriptions in OPAS, you must select a screen that includes the prescriptions table.

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




You can see which screen is used for your log-in at any time, by going into Utilities – Users.

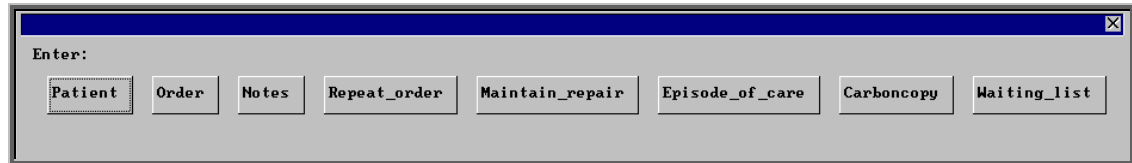


If the *Patient Screen* field is blank, OPAS will default to the VERBOSE screen for that user.

2. Entering a new patient

Menu: Patients

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

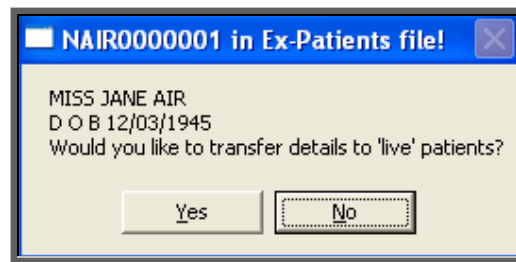


To select Patient, single click on the Patient button with the mouse, or type **P**, or press **Enter**.

At the bottom of the screen you are asked for the Hospital Number. If you know the Hospital Number for this patient, enter it; if not, type **?** and a temporary number will be allocated to this patient by the system. This temporary number can then be changed to the actual Hospital Number later by updating the patient. Temporary patient numbers are normally prefixed with TMP, but this can be changed if required (see [Utilities - Note 21. Order numbers](#)).

Once the hospital number has been entered, OPAS will check to make sure that a patient with that hospital number has not been added before. If it finds a patient with that hospital number one of two things will happen, depending whether the patient already on OPAS is a 'live' patient (by this we do not mean alive, but that they are a current patient!) or an Ex-Patient (a patient that has been archived).

- 1) If the patient is a 'live' patient you will be taken out of enter mode and the patient with that hospital number will be shown on the screen.
- 2) If the patient is an Ex-Patient you will be given the option to reinstate the patient into the 'live' patient area.



If you have entered a hospital number that is not on OPAS a blank patient screen will appear so that the patient details can be entered.

<i>Hospital No</i>	shows automatically as the number you entered and cannot be changed while entering a new patient. You can edit the hospital no later if you need to.
<i>Registered</i>	shows automatically as today's date and cannot be changed.
<i>By</i>	shows automatically as your login name and cannot be changed.
<i>NHS No</i>	is the patient's National Health Service number and is optional.
<i>D O B</i>	is the patient's date of birth: enter this as ddmmyyyy, e.g. 31121911. You do not need to put a / between the day, month and year – they will appear automatically.
<i>Age</i>	calculates automatically from the <i>DOB</i> and cannot be changed.
<i>D O D</i>	is the patient's date of death and at this stage is bypassed by the system. It can be entered when updating a patient's record.
<i>Title</i>	is the patient's title. You can either type this in or select from the pop-up menu (press Tab if necessary to see the pop-up menu). Titles to appear in the pop-up should be set up in Utilities – Choices – Patients – Titles
<i>Forenames</i>	e.g. ALAN DAVID . If you type in lower case, it is automatically converted to upper case or proper case, depending on which 'long' screen is being used.
<i>Surname</i>	e.g. WILSON . If you type in lower case, it is automatically converted to upper case or proper case, depending on which 'long' screen is being used.
<i>Sex</i>	is automatically shown as M or F depending on the <i>Title</i> . If it is blank (because the title could be male or female (e.g. Doctor)), type in the appropriate letter.
<i>Ethnicity</i>	press Tab to select from the list of ethnicities, if required. (Ethnic Origins to appear in the pop-up should be set up in Utilities – Choices – Patients – Ethnicity)
<i>Address</i>	gives five lines for the address. If you type in lower case, it is automatically converted to upper case or proper case, depending on which 'long' screen is being used. There is an option on the <i>Town</i> and <i>County</i> fields to press Tab to select from a pop-up list. (Towns and Counties to appear in the pop-ups should be set up in Utilities

– Choices – Patients – Towns and Utilities – Choices – Patients – Counties). Alternatively defaults can be created in Utilities – Choices – Defaults.

Mailing Address as you **Enter** through the mailing address fields, the details in the main address will automatically appear. If the patient has a different address for correspondence to their normal address, e.g. if they are temporarily in a convalescent home, delete the *Mailing Address* details using **F8** on each line and type the temporary address. If pop-ups have been created for Town and County on the main address, these can be used in the *Mailing Address* too.

Home Phone enter if required.

Work Phone enter if required.

Mobile enter if required.

Fax enter if required.

Email enter if required.

GP select from the pop-up menu if known.

Purchaser select from the pop-up menu (normally the NHS Trust). (Purchasers to appear in the pop-up should be set up in **Utilities – Choices – Purchasers**)

ConsRef select from the pop-up menu of Referrers. (Referrers to appear in the pop-up should be set up in **Utilities – Choices – Referrers**)

Clinician select from the pop-up menu if required. (Clinicians to appear in the pop-up should be set up in **Utilities – Choices – Clinicians**)

Private Patient type **Y** if the patient is a private patient, otherwise type **N**.

Inpatient type **Y** if the patient is an in-patient, otherwise type **N**.

Transport select from the pop-up menu the method of transport this patient normally requires. (Transport options to appear in the pop-up should be set up in **Utilities – Choices – Appointments – Transport**)

Exempt enter the prescription charge exemption evidence if applicable. (Exemption reasons to appear in the pop-up should be set up in **Utilities – Choices – Patients – Exempt**)

<i>Until</i>	if the exemption evidence has been entered, enter here the date of its expiry, in the format DD MM YYYY.
<i>Review</i>	enter the date the patient is to be reviewed, in the format DD MM YYYY.
<i>Comments</i>	enter any additional comments required for this patient.
<i>Alias</i>	enter any additional information regarding the patient's name i.e. maiden name or name patient may be known by other than their birth name.
<i>Occupation</i>	enter the patients occupation.
<i>Special Instructions</i>	this field is invisible until something is entered into it and then it becomes highlighted to draw your attention.

Alias pation	Ward:
<p>patient can be very aggressive</p> <p>All patient notes MUST be treated as confidential</p>	

<i>DOR</i>	is District of Residence. If <i>Auto-update DOR</i> is set to Yes in Utilities – Choices – System , this will be automatically populated when you have finished entering the patient details if a valid postcode is entered in the <i>Post Code</i> field of the address.
<i>Notes</i>	indicate whether paper notes are held by entering Y(es) or N(o) If Y is entered the patients name will be painted yellow.

Title	Forenames	Surname	D
MS	MARY	LITTLE	

<i>Service</i>	if multiple services are using OPAS, select the service the patient belongs to from the pop-up list. . (Service options to appear in the pop-up should be set up in Utilities – Choices – Patients – Services)
<i>Earliest</i>	enter the earliest appointment time the patient can attend.
<i>Latest</i>	enter the latest appointment time the patient can attend.
<i>Weight</i>	enter the patients weight in kilos if known.

<i>Height</i>	enter the patients height in metres if known.
<i>Activity</i>	enter the patients mobility on a scale of 1 to 5 (1 being low – 5 being high).
<i>Ward</i>	press Tab to select from the list of wards, if required. (Wards to appear in the pop-up should be set up in Utilities – Choices – Wards)

You do not have to go through all the fields on the **Patient** screen. Once all the relevant data has been added, press **Ctrl-Enter** to save the record and to start adding the next patient.

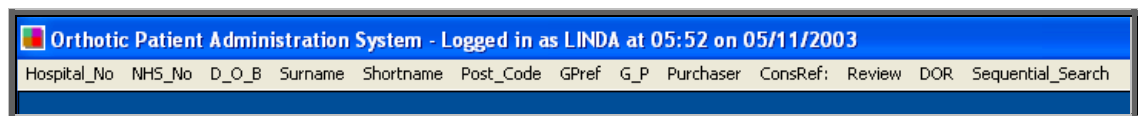
The **Patients** screen can be customised in order to control which fields have pop-up menus appearing automatically, and which fields you have to press the **Tab** key to access the pop-up menus. Also, if you mainly enter the same details in a field i.e. *County*, this field can be set to default to the required County to cut down on typing (see [Utilities – Note 3. Choices – Defaults](#)).

3. Finding a patient's record

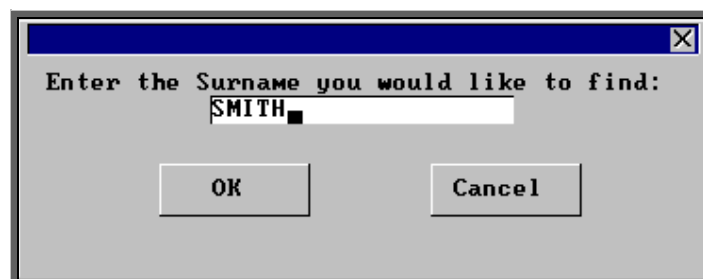
Menu: **Patients**



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





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

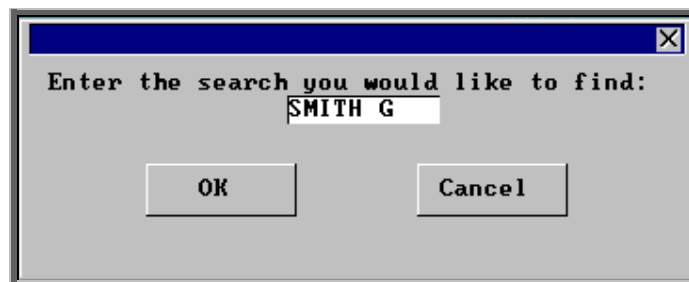


Enter your search criteria in the pop-up box, (In this example you would type the patient's Surname) and then click on **OK** or press **Enter** twice. N.B. Searching by Surname is case sensitive i.e. you must type the surname you are looking for in the same case (UPPER or Proper) as it appears on the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



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

on the 'arrow' icon  (**F6**) you can step through the patients with that surname until you find the patient you are looking for. Alternatively, select the 'browse' icon  (Data, Browse) to see those records that match your search in a list. (see **Moving around OPAS - Note 6. Standard menu options**).

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




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

icon  (**F6**), or by selecting the 'browse' icon  (Data, Browse) to see those records that match your search in a list.


Bookmarked patients

When you want to find a patient that you know you have worked on earlier, click on

the 'back' icon  (**G**oto, **B**ookmark), and you will be presented with a list of patients that you have dealt with since you logged on. The list will be in order with the patient you worked on most recently at the top. If you have dealt with a patient on a number of occasions, their name will only appear once, and be in position of the last occurrence.

Hospital no	Title	Forenames	Surname
NTEMP000012	MR	JOHN	DOE
NTEMP000007	MISS	LIBBY	MCMANUS
N12345QWERTY	MR	KELVIN	BLOGGS
TORUS44	MISS	TESSA	SMITH
NG123456	MISS	JULIE	COLE

To go back to one of the patients in the list, click on the patient so the green

highlighter is on the correct line, and then click on the 'exit' icon  (File, Return).

A patient can be bookmarked manually if you know that you will want to go back to that record shortly. Click on In this at the top of the **Patient** screen and select Bookmark.

Note: The list of bookmarked patients is cleared when you log out of OPAS, so will only show patients since you logged on.

4. Amending a patient's record

Menu: **Patients**

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



(Edit, Update) and the box below will appear.

Update current patient details
or change this Hospital No.

Details Hospital_No

Details

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

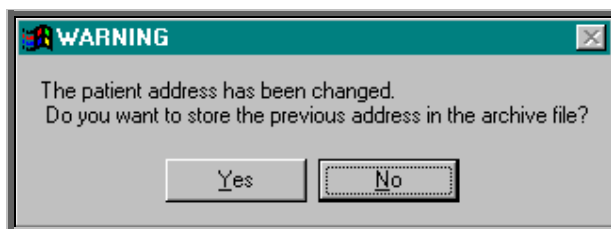
To update a particular field, either move through the fields with **F4** or **Enter**, or click on the data you want to change with the mouse.

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

Title
Ethnicity
Town
County
GP
Purchaser
ConsRef (Referrer)
Clinician
Transport
Service
Ward

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


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



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

Previous addresses of a patient can be seen by finding the patient's record and clicking on **Goto** at the top of the screen and then selecting **Addresses**.

Alternatively, a summary of their last three addresses can be seen by pressing the

'arrow' icon  (**PgDn**) to go to the bottom of the screen where the *Addresses* table is located.

DNAs		Addresses	
On:	At	Add:	PC:
		10 LITTLE CORNER	P07 6XL

Hospital number

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

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

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

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

Orthotic Patient Administration System

File Data Launch Sort

Notes

All patient notes MUST be treated as confidential.

Hospital No 222245454 MISS JANE AIR

Date 28/08/2000 By: LINDA Category UPDATE

Notes Hospital number changed from AIR0000001 at 14:45

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

Orthotic Patient Administration System

File Data Launch Sort

Patients

Registered: 26/04/2000 By ROOT

Last Update: 28/04/2003 By LINDA

5. Changing the mailing address

Menu: **Patients**

This allows you to enter a new mailing address for the patient, or delete the current mailing address. This is used if the patient changes address temporarily, e.g. by going on holiday, so that the permanent address is retained and a temporary address for correspondence is used in the meantime.

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

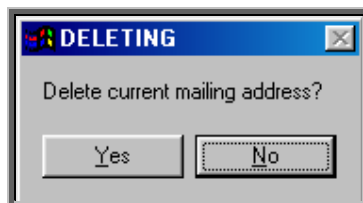
To add a new mailing address or to change an existing one, click on the 'mailing'



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




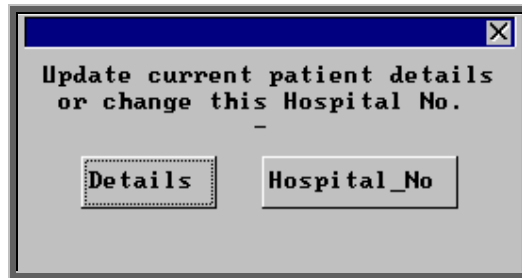
To delete a mailing address, click on the 'delete mailing' icon (Mailing, Delete). You are prompted to confirm deletion and the temporary mailing address is deleted.



6. Deceasing a patient

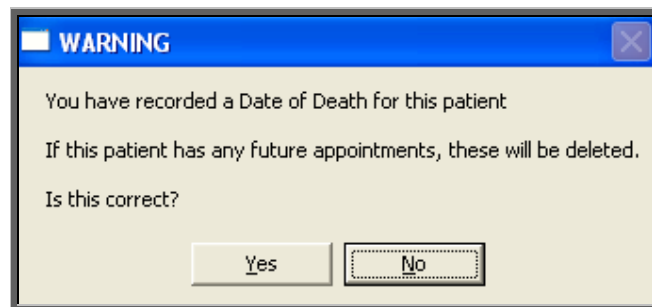
Menu: **Patients**

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

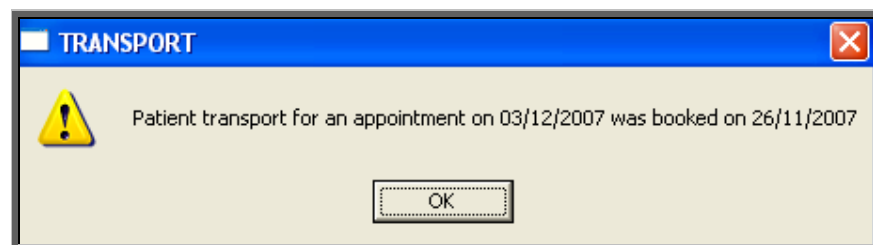


Select Details and move to the *D O D* (Date of Death) field. Input the date of death in the format DD MM YYYY. If you wish to enter today's date press the **F2** key.

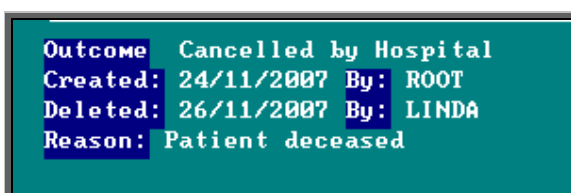
When you press **Ctrl-Enter** to save the changes OPAS will notice that a date of death has been recorded and give you the following prompt.



It is important that at this point you confirm the correct patient has been updated. Once **Yes** has been selected, OPAS will find any future appointments and cancel them, so that the slots can be freed for another patient. If OPAS can see that transport was booked for any of the appointments, then the following message will appear.



The appointment cancelled will be updated with an *Outcome* of 'Cancelled by Hospital' and a *Reason* of 'Patient deceased'. An automatic note will also be created in the patients notes.



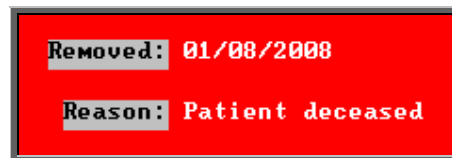
Orders

Once any future appointments have been dealt with, OPAS will then look to see if the patient has any orders where the goods have not yet been supplied.



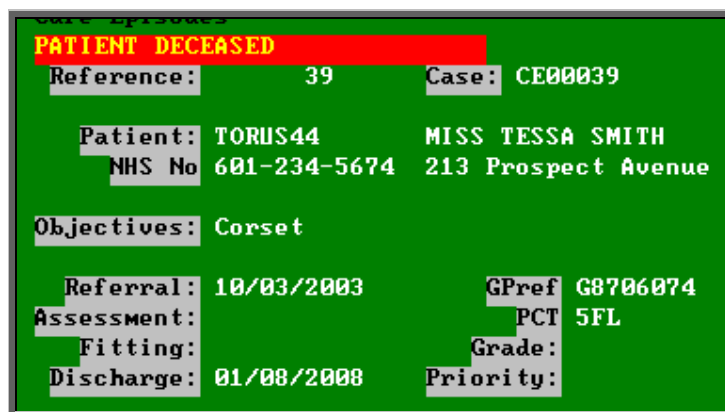
Waiting List

If the patient is on the waiting list, they will be removed from the waiting list.



Care Episodes

If the patient has any care episodes, they will all be marked as discharged.



The patient record will then be marked to show that they are deceased, and OPAS will not let you raise new orders, care episodes or appointments.

Patients			
This patient is deceased		Registered: 06/10/1998	By ROOT
		Last Update: 26/06/2008	By LINDA
Hospital No	N00361807	NHS No 462 328 2465	D O B 31/12/1889
Title	Forenames	Surname	D O D 02/03/2008
	AARON	JONES	Sex M Ethn
Address 4	CHILHAM ST	Mailing 4	CHILHAM ST

However, you do have the ability to add patient notes to a dead patient.

If an ad hoc letter note is created, the letter will be addressed to 'The Executors and Trustees of' the patient.

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

7. Deleting a patient

Menu: Patients

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



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

DELETE PATIENT

Do you want to DELETE this patient?

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

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

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

The patient remains in the file and, if deleted by mistake, can be undeleted by simply

clicking on the 'delete' icon  (Edit, Delete) again.

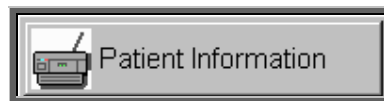
Deleting a patient does not delete any orders or appointments for that patient.

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

8. Printing options

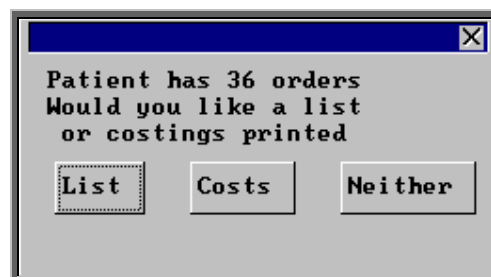
Menu: **Patients**

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



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

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



List

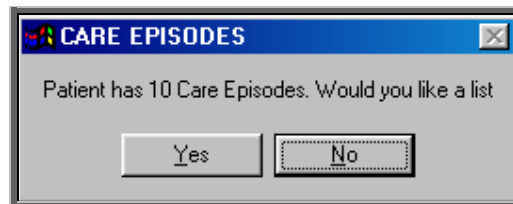
List prints a list of orders for that patient (Order number, Date of order and the general Description for that order).

Costs

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

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

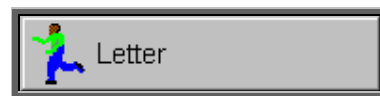
A box will then appear showing how many care episodes the patient has.



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



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




By selecting **Letter** you will see the letters and forms that can be printed from the **Patient** screen. You have the opportunity of setting up to 26 standard patient letters that can be merged with patient information. (For further information on how to set up these letters [see Utilities - Note 15. Choices - Letters](#)). There are also two forms, HSA5 and WF1, set up for you ([see - Patients - Note 19. Printing HSA5/WF1 forms](#)).

9. Prescriptions

Menu: **Patients**

If you use the prescriptions facility in OPAS (i.e. you are using a patient screen that includes the prescriptions table) then prescription details has to be entered for each patient and each order/care episode is assigned to a prescription. This means that the relevant prescription must be entered onto the system before an order or care episode can be entered and assigned to it.

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



If you do not use the prescriptions facility (i.e. you are using a patient screen that does not include the prescriptions table), then **Prescriptions** will not appear as an option in the box above.

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

<i>Hospital No</i>	Hospital No will be brought through from the patient record.
<i>Patient</i>	Patient name will be brought through from the patient record.
<i>Sex</i>	(M)ale or (F)emale will be brought through from the patient record.
<i>DOB</i>	DOB will be brought through from the patient record.
<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Description</i>	50 characters available to describe in simple words what the prescription is for. This description used here will appear in the description field of any orders raised against this prescription and will ultimately will appear on appointment letters. Therefore words that will be understood by the patient should be used. As well as

being able to free type in this field you can also select a description from a pop-up list by pressing the **Tab** key. (Standard descriptions to appear in the pop-up should be set up in **Utilities – Choices – Descriptions**)

<i>Referrer</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Orthosis code</i>	Press Tab to select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes).
<i>Date</i>	Today's date will automatically be entered. You can overwrite with another date if required.
<i>Length</i> valid.	is entered as the number of years for which the prescription is valid.
<i>Order No</i>	is entered automatically by the system: it is a sequential number, not the number of an order raised against the prescription.
<i>Notes</i>	additional information can be entered as required.
<i>GPRef</i>	GP Ref will be brought through from the patient record and cannot be changed.
<i>PCT</i>	PCT information will be brought through from the patient record and cannot be changed.
<i>NHS No</i>	the patient's NHS number will be brought through from the patient record and cannot be changed.

Updating prescriptions

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



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

Cancelling prescriptions

Prescriptions should not be cancelled. If you wish to cancel a prescription, follow the steps above for updating prescriptions, and amend the *length* of the prescriptions

to '0' years. The prescription will then be no longer valid and orders and care episodes cannot be assigned against it.

Expired prescriptions

Prescriptions are highlighted with a red banner once they have expired.

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

If you try to assign an order or care episode to an expired prescription, the following message will appear.



10. Adding a care episode


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

Menu: **Patients**

Find the patient that you wish to add a care episode.

If you are not using prescriptions move onto step 2

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

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

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

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

Enter:

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

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

Add a Care Episode for MR JAMES HERRIOT

Yes No

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

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

NB. If you are using care episodes to send information to the main hospital system with regards to the 18 week journey, then the case number entered here must be the RTT case number issued at the start of that journey.

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

Objectives: free text available to outline the objectives of this care episode.

Referral: date of referral. This will default to today's date, which can be changed or taken out by pressing **F8**.

<i>Assessment:</i>	date of assessment
<i>Fitting:</i>	date of fitting
<i>Discharge:</i>	date of discharge
<i>Consref:</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Purchaser:</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Clinician:</i>	Clinician will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Clinicians and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Orthosis:</i>	select an orthosis code from the pop-up list
<i>Grade:</i>	enter a grade for the episode
<i>Priority:</i>	enter a priority for the episode
<i>Referred:</i>	select the diagnosis by the referrer from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Diagnosis)
<i>Diagnose:</i>	select the diagnosis by the hospital from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Diagnosis)
<i>Intervention Type:</i>	select the intervention type from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Intervention)
<i>Initiator:</i>	select an initiator from the pop-up list (options to appear in the pop-up should be set up in Utilities – Choices – Initiators)
<i>Primary Source</i>	select the original referrer of the patient from the pop-up list
<i>Primary Date</i>	enter the original referral date

Primary Assessment enter the date of the assessment made by the original referrer

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

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


To learn more about care episodes go to [Section 4 – Care Episodes](#).

11. Waiting List

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

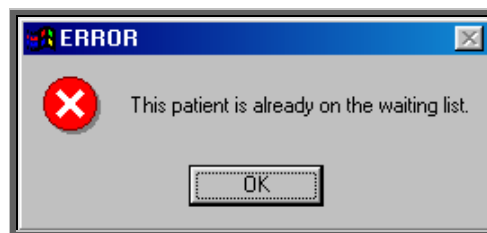
Menu: **Patients**

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

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

Click on Waiting List (press W).

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





Otherwise you will be taken to the waiting list screen.

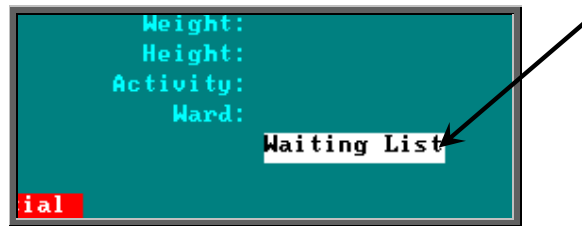
Referral Date: enter the date of referral. The field will default to today's date but this can be overtyped.

<i>Type:</i>	select from the pop-up list by highlighting the required type and pressing the Enter key or by double clicking on it with the mouse.
<i>New:</i>	enter Y if the patient is new or N if the patient has been seen before. Instead of entering N , you could further classify the appointment by entering S for supply, F for fitting or R for review.
<i>For:</i>	gives you the opportunity to say (in 30 characters) why the patient needs to be seen.
<i>Orthosis Code:</i>	select the appropriate orthosis code from the pop-up list
<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Referrer:</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Venue:</i>	select a venue from the pop-up list. Otherwise press the Enter key to move to the next field.
<i>Clinician</i>	select a clinician from the pop-up list. Otherwise press the Enter key to move to the next field.
<i>Length</i>	The length of appointment can be entered here. This is to assist when making an appointment.
<i>APE</i>	Whether the patient requires an AM , PM or Evening appointment can be entered here.
<i>Service</i>	Service will be brought through from the patient record but it can be changed to another service as long as it is a service that is assigned to the patient on the Patient screen.
<i>Tagged</i>	this option allows a waiting list entry to be tagged. Primarily this is to enable batch printing of waiting list letters.
<i>Order No</i>	an order number can be selected from the pop-up list.


If an appointment is subsequently made from the **Waiting List** screen using the

‘clock’ icon  (Appoint, Next) or the ‘autoclock’ icon  (Appoint, Quick), the fields in **red** are used.

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



To access the waiting list screen from the **Patient** screen, click on the 'waiting list'

icon  (Goto, Waiting List, Current).

To learn more about the waiting list go to **Section 5 – Waiting List**.


12. Adding an Order

Menu: **Patients**


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

If you are not using prescriptions move onto step 2

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

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


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

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

Enter:

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

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

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

Add an order for MR JOSEPH KING

Yes No

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

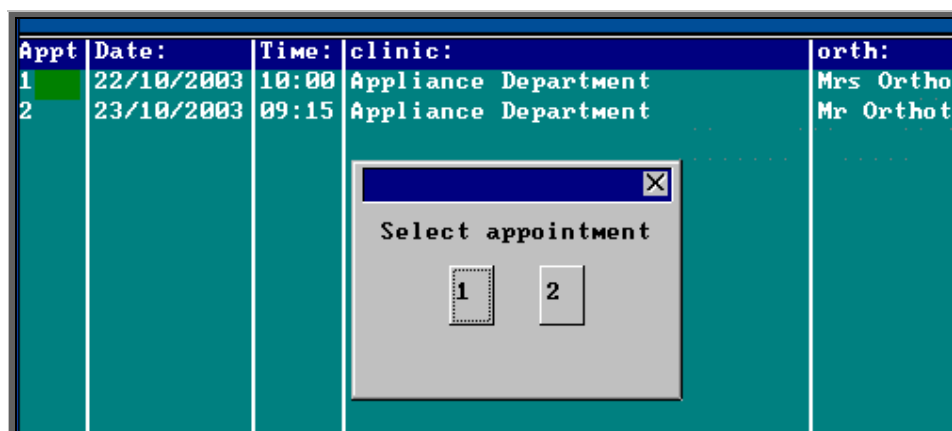
If you select **Yes** a new order will appear on the screen for you to complete.

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

<i>Hospital No</i>	Hospital No will be brought through from the patient record.
<i>Patient</i>	Patient name will be brought through from the patient record.
<i>Sex</i>	(M)ale or (F)emale will be brought through from the patient record.
<i>DOB</i>	DOB will be brought through from the patient record.

<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Date of Order</i>	Today's date will automatically be entered. You can overwrite with another date if required.
<i>Order Number</i>	The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities - Note 21. Order numbers). You can overwrite this as long as the order number you type is unique (i.e. has not been used before and is unlikely to be automatically offered on a future order).
<i>Supplier</i>	Select the supplier you are ordering the goods from. (If the supplier does not appear in the pop-up list they will need to be added in Utilities – NSI – Suppliers .)
<i>Cross Ref or Hsp Order No</i>	This is an optional field where you may wish to quote a supplier's reference number or an internal reference number. If a blanket order number has been assigned to the supplier, this will appear automatically in this field.
<i>Description</i>	<p>50 characters available to describe in simple words what the order is for. This description can appear in appointment letters so should be terminology understood by the patient. As well as being able to free type in this field you can also select a description from a pop-up list</p> <p>by pressing the Tab key. (Standard descriptions to appear in the pop-up should be set up in Utilities – Choices – History – Descriptions)</p>
<i>Orthosis Code</i>	This is a mandatory field. You must select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes)
<i>Referrer</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>In-patient</i>	Type N for No or Y for Yes.
<i>Paid</i>	If the patient has to pay for the goods, (e.g. the orthosis incurs a prescription charge) the date they pay can be entered here in the format DD MM YYYY. To leave this field blank press the Enter key.
<i>Receipt</i>	If the patient has to pay for the goods, the receipt number can be entered here.

<i>Amount</i>	If the patient has to pay for the goods, the amount they paid can be entered here.
<i>Expected</i>	This date will be calculated from the Orthosis Code that was entered
<i>Supply Date</i>	above. When the Orthosis codes are set up there is the opportunity to say how long that type of item takes to be delivered. If an Orthosis Code has been set up with a delivery of 7 days, the <i>Expected Supply Date</i> will show as 7 days from today's date. If the delivery field is not used when the Orthosis Code is set up, the <i>Expected Supply Date</i> will show as today's date. The date that appears can be overtyped with another date if required.
<i>ACO</i>	<p>What you enter here will determine what OPAS will do when you book the goods in as being received.</p> <p>A if the order will need an appointment to be made for fitting. When the order is received from the supplier, the system will automatically make an appointment.</p> <p>C if the order is to be collected but does not need an appointment: when the order is received from the supplier, the system will generate a collection letter to advise the patient that the order is ready for collection.</p> <p>E if the order will be fitted during an existing appointment for that patient. The system will check the existing appointments for the patient and link the appointment to the order by automatically entering the order details onto the appointment and inserting the date of the existing appointment into the <i>Appointment</i> field on the order. If the patient has more than one future appointment you will be asked to select which appointment you wish to link the order with.</p>



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



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

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

- Time* If you enter **A** in the *ACO* field, you must indicate how long an appointment the patient will need. The default length of your appointments (as set in **Utilities – Choices – System**) will automatically appear in the *Time* field but this can be overtyped.
- Clinic* If you enter **A** or **C** in the *ACO* field, you must say which clinic venue they need to attend or collect the goods from. A pop-up list will give you your available options. (Clinic venues to appear in the pop-up should be set up in **Appointments – Venues**)
- Clinician* If you enter **A** in the *ACO* field, you can state which Clinician they need to see. If the patient can see any Clinician then leave this field blank. If you have entered a Clinician on the Patient record, this will show through onto the order. If you need to add/edit the Clinician, press the **Tab** key to see the list of options.
- Day* If necessary, a day of the week can be specified for the appointment. Press the **Tab** key to see the list of options. If you enter a day here, when the goods are booked in and OPAS finds the next available appointment, it will only look for available appointments on that day. Therefore, care should be taken that you do not enter a mismatch here i.e. by saying that they need to see Mr Clinician on a Monday when Mr Clinician only has a clinic on a Friday.
- APE* If you enter **A** in the *ACO* field, you can specify whether the appointment made should be an **AM**, **PM** or **Evening** appointment.
- Letter* If you enter **A** or **C** in the *ACO* field, you can state which letter type will be required. The field will default to your default standard appointment/collection letter (as set in **Utilities – Users/Appointments – Venues**).

- Transport* If you enter **A** in the *ACO* field, you can state which type of transport the patient needs, if any. If you have entered Transport details on the Patient record, this will show through onto the order.
- Prescription No* If you are using prescriptions, the prescription number will show automatically in this field.
- Care Episode* If a care episode has been created for this patient, the order can be linked to the care episode by entering the care episode reference number. Press the **Tab** key to see the list of care episodes for the patient. If the pop-up list is empty, there are no current care episodes for the patient.
- More than one order can be linked to a care episode. When the goods are booked in against an order, if the *ACO* field has been set to **A** (Appointment) or **C** (Collection) an appointment or collection letter will not be produced until all the orders quoting that care episode have been received.

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

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

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

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

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

If the item you are looking for is not in the list, press the **Esc** key to make the pop-up list disappear and leave the code field blank. If the item is not in the pop-up list and it is an item you order regularly you can add the item as a Non Scheduled Item (**Utilities – NSI – Items see Utilities - Note 29. NSI**) so that it appears in the pop-up list in future.

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

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

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

S standard
E exempt
Z zero-rated
R reclaim.

The VAT field will default to the vat code held against the item code but you can overtype this with an alternate VAT rate. If you have not entered an item code, the VAT code will default to S.

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

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

If the price does not appear automatically it will have to be entered manually. If this is an item you order regularly you can add the price as a Non Scheduled Price (**Utilities – NSI – Prices see Utilities – Note 29. NSI**) so that the price will appear automatically in future.

Enter as many lines in the detail section as are needed, but you **must** press **Enter** after entering the *Price*, so that the highlight moves on

to the next line. If you don't, background calculations are not carried out by the system and problems may occur in the calculation of VAT. Once you have entered the last line it is safest to press **Enter** to move the highlight into *Code*, then **Enter** again to move it into *Description* then **Enter** again to move it into *Notes*.

Notes Any additional information can be entered here.

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

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

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

If you have instant print switched on, the order will print automatically at this point.

To learn more about orders go to **Section 6 – Orders**.

13. Re-printing individual orders

If you have lots of orders to print it is best to print them in batch (**see Orders - Note 7. Printing/faxing orders in batch**), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: **Patients**

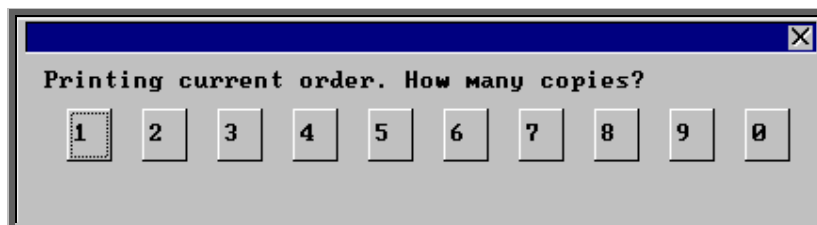
Find the patient whose order you wish to print.



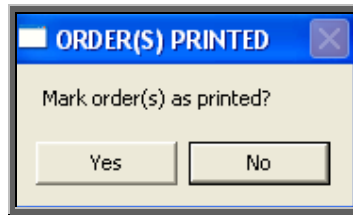
Click on the 'orders' icon (Goto, History, Current) to show the current orders for that patient.



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



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



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

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

14. Re-faxing individual orders

Before being able to fax orders directly from OPAS you need to:

- 1) Enter the fax driver information in the *Fax printer* field in the system parameters screen (**Utilities – Choices – System**). (see **Utilities – Note 15. Choices – System**)
- 2) Identify those suppliers you wish orders to be faxed to in **Utilities – Choices – History – Fax**.

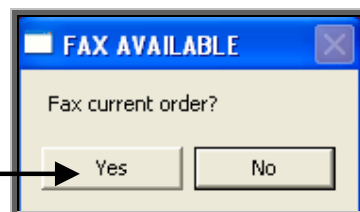
Find the patient whose order you wish to fax.



Click on the 'orders' icon (Goto, H^{istory}, C^{urrent}) to show the orders for that patient.

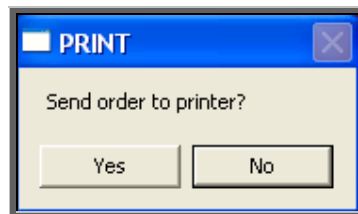


Find the relevant order, click on the 'print' icon (F^{ile}, P^{rint}), and select **Orders** from the print menu.



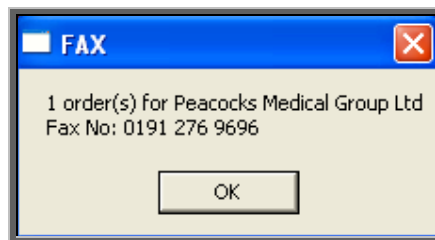
The above prompt will appear unless the supplier on the order is an internal stock supplier. If the supplier is **Stock** you will only be able to print the order and you will be asked how many copies are required.

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



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

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



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

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

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


15. Entering medical notes

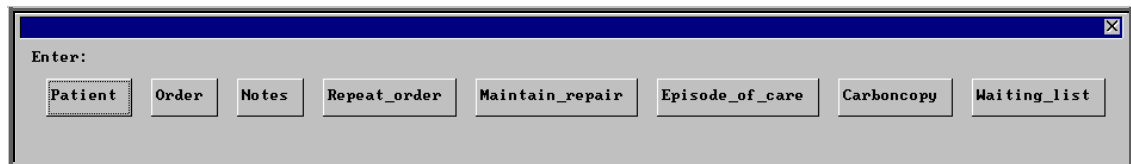
Medical notes can be added directly to the patient record, or, if a care-episode has been set up for the patient ([see Patients - Note 10. Adding a care episode](#)), notes can be attached to a specified episode of care.

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

Menu: Patients

1. Adding a medical note to the patient

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



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

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

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

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

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

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

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

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

A category of 'scanned' has already been set up for you. Choose this category when attaching a scanned image as a Note:

A category of 'document' has already been set up for you. Choose this category when attaching a document (e.g. MS Word document) as a Note:

A category of 'SOAP' has already been set up for you. Choose this category if adding a SOAP Note:

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

Episode

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

Note

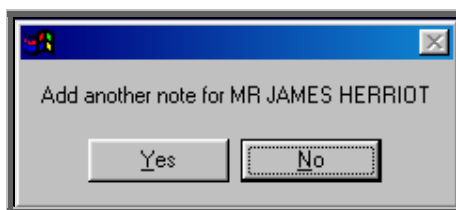
Adding a standard Note

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

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

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

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



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

Adding a Note using the 'Video' category

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

Adding a Note using the 'Picture' category

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

Adding a Note using the 'Scanned' category

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

Adding a Note using the 'Document' category

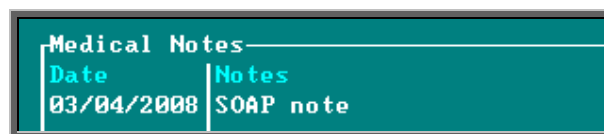
In the *Note* field type the file name (including it's extension) and path of the document file you wish to attach as a Note:

Adding a Note using the 'SOAP' category

Rather than the note text being entered into one *Notes* field, it can be entered over four SOAP note fields (*Subjective*, *Objective*, *Action* and *Plan*).

Selecting this category will jump you past the standard *Note* field and into the *Subjective* field. Once the subjective note has been typed, press the **F4** key to move to the *Objective* field. Continue to do this with each field. Press **Ctrl-Enter** when finished.

In the **Notes** summary table on the **Patient** screen, the first line of the *Notes* field is shown. As this is empty on a SOAP note, a description of SOAP note is entered here.



Medical Notes	
Date	Notes
03/04/2008	SOAP note

Adding a Note using the 'Temp' category

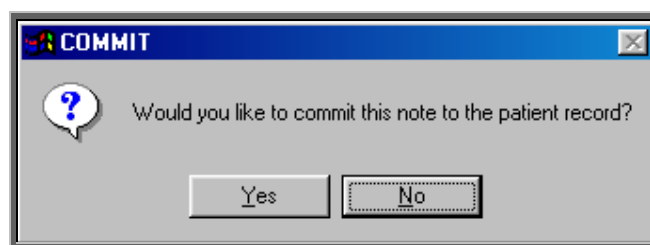
In the *Note* field press **Ctrl-Enter** or **F10** to be taken to the Text Editor. The patient's name and hospital number will already be

entered at the top of the text editor, so that if you choose to print the temporary note to be checked later you will know who the note belongs to. (You will want to take this out before you finally commit the Note: This can be done quickly by positioning the cursor on the line you wish to delete and pressing **F8**.)

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

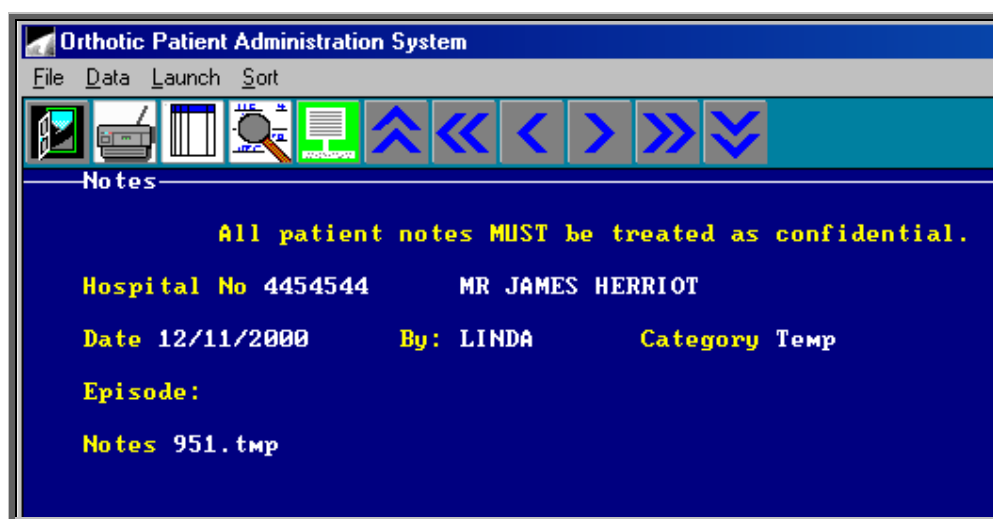
If you wish to print the temporary note press **Alt-P**

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



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


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




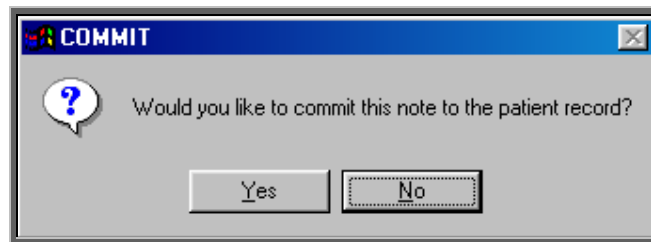
Editing a note entered with a 'Temp' category

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

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

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

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



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

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

Adding a Note using the 'Letter' category

In the *Note* field press **Ctrl-Enter** to be taken to the Ad hoc letter screen.

Letter: Select which of the 26 available letter templates is to be used

Copies Select the number of copies required. This will default to 1 but can be overtyped

para1-para9 Type in the required text in as many of the paragraph sections that are required. Move down the

paragraph fields using either the **F4** key or **Down-Arrow** key.

Press **Ctrl-Enter** when finished.

In the **Notes** summary table on the **Patient** screen, the first line of the *Notes* field is shown. As this is empty on a **Letter** note, a description of **Ad Hoc letter sent** is entered here.

When you are looking at a letter note, click on the 'letter' icon



(Letter) to see the letter text.

If you wish to reprint the letter, click on the 'letter' icon (Letter) to see the letter text.



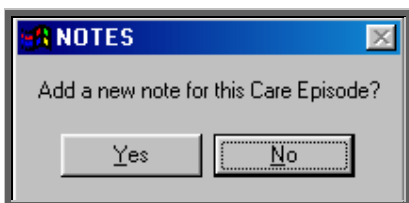
2. Adding a medical note to a care episode

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



(Goto, Care)

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



Select **Yes** to continue, or **No** to abandon adding a Note:

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

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

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

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

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

A category of ‘video’ has already been set up for you. Choose this category when attaching a video as a Note:

A category of ‘picture’ has already been set up for you. Choose this category when attaching a photograph/picture as a Note:

A category of ‘scanned’ has already been set up for you. Choose this category when attaching a scanned image as a Note:

A category of ‘document’ has already been set up for you. Choose this category when attaching a document (e.g. MS Word document) as a Note:

A category of ‘SOAP’ has already been set up for you. Choose this category if adding a SOAP Note:

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

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

Note Adding a standard Note

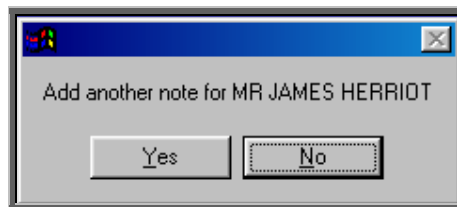
When typing text for the notes, remember that the first line of the note is shown in the list of medical notes on the patient’s screen, so consider making the first line a summary of the content of the Note:

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

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

initially. However, by pressing **F7** the text will be realigned for you.

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



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

Adding a Note using the 'Video' category

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

Adding a Note using the 'Picture' category

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

Adding a Note using the 'Scanned' category

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

Adding a Note using the 'Document' category

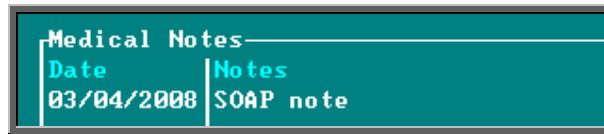
In the *Note* field type the file name (including it's extension) and path of the document file you wish to attach as a Note:

Adding a Note using the 'SOAP' category

Rather than the note text being entered into one *Notes* field, it can be entered over four SOAP note fields (*Subjective*, *Objective*, *Action* and *Plan*).

Selecting this category will jump you past the standard *Note* field and into the *Subjective* field. Once the subjective note has been typed, press the **F4** key to move to the *Objective* field. Continue to do this with each field. Press **Ctrl-Enter** when finished.

In the **Notes** summary table on the **Patient** screen, the first line of the *Notes* field is shown. As this is empty on a SOAP note, a description of SOAP note is entered here.



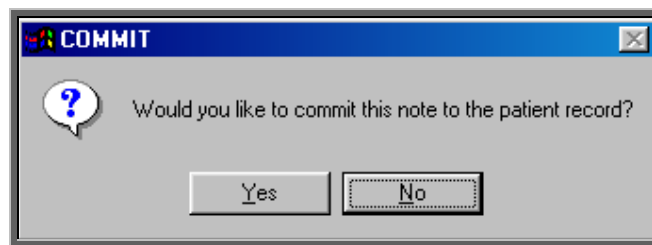
Medical Notes	
Date	Notes
03/04/2008	SOAP note

Adding a Note using the 'Temp' category

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

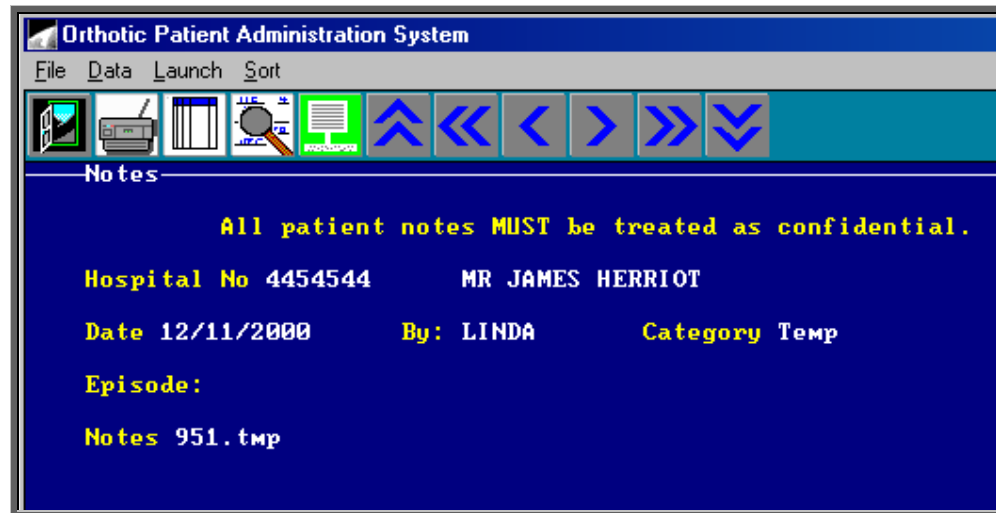
Type in the note, remembering that the first line of the note is shown in the table of medical notes on the patient's screen. Consider making the first line a summary of the content of the Note:

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





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


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

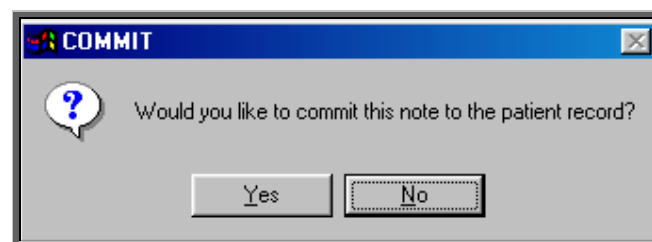


Editing a note entered with a 'Temp' category

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

clicking on the 'notes' icon  (Goto, Notes). Use the 'arrow' icon  (F6) to find the note you wish to edit).

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



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

If you select **No**, the changes will be saved against its temporary note number, but the note can still be amended again later. The

note will continue to be available for editing until you commit the note to the patient record (by selecting **Yes** to the above prompt).

Adding a Note using the 'Letter' category

In the *Note* field press **Ctrl-Enter** to be taken to the Ad hoc letter screen.

Letter: Select which of the 26 available letter templates is to be used

Copies Select the number of copies required. This will default to 1 but can be overtyped

para1-para9 Type in the required text in as many of the paragraph sections that are required. Move down the paragraph fields using either the **F4** key or **Down-Arrow** key.

Press **Ctrl-Enter** when finished.

In the **Notes** summary table on the **Patient** screen, the first line of the *Notes* field is shown. As this is empty on a **Letter** note, a description of Ad Hoc letter sent is entered here.

When you are looking at a letter note, click on the 'letter' icon



(**L**etter) to see the letter text.

If you wish to reprint the letter, click on the 'letter' icon (**L**etter) to see the letter text.



16. Verifying notes

Verifying notes, gives the Orthotist the opportunity to check notes added by other personnel and mark that they are correct.

Anyone needing to verify notes needs to set up a verification password. This should be different to your log-in password and should be kept secure.

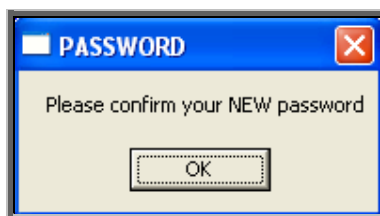
a) Creating a verification password

Menu: Utilities – Passwords - Verification



If you do not have a verification password (or if you have forgotten it and the OPAS administrator has reset it) type in your log-in password.


Then you will be asked to type in your new verification password.

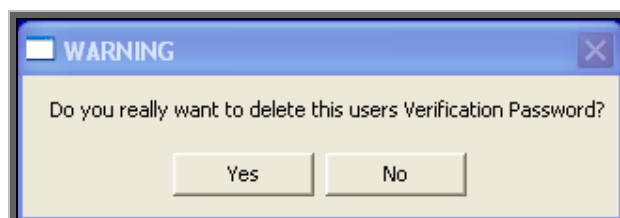


You will be asked to type your new verification password again, before confirming that your password has been stored.

b) Resetting a verification password

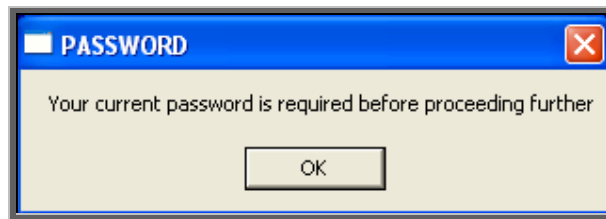
No one has the ability to look up a verification password (not even Linda or Martin at Wynnldodge). If somebody forgets their verification password, then a user with administrator access has to reset it so they can go through the steps in (a) again. To reset verification passwords go into **Utilities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

relevant user record, click on the 'cancel verification' icon  (File, Clean_Up, Verification).



Click on **Yes** to continue.

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

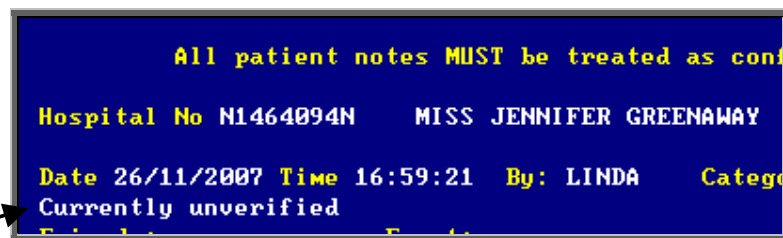


c) Verifying notes

To verify a patient's notes, find the patient record and go to their notes by clicking on



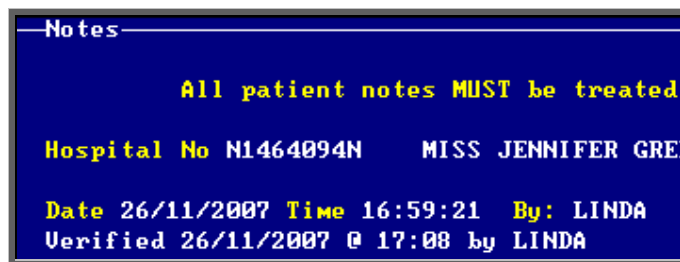
the 'notes' icon (Goto, Notes).



Any notes that have not been verified will show the message 'Currently unverified' underneath the *Date* of the Note:

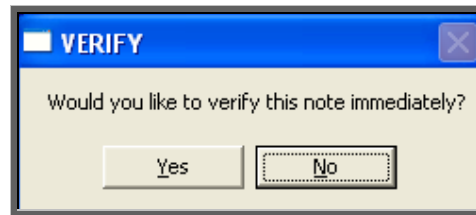


To verify the note, click on the 'verify' icon (Verify). You will be asked to type in your Verification password. As soon as you have typed all the characters of your password, the note will be updated with the date, time and name of the verifier. There is no need to press the **Enter** key after the password. If you need to press **Enter** then the password is incorrect and the note will remain unverified.



d) Adding and Verifying notes

If you are set up with a verification password, when you add a note you will have the option after finishing the note to verify the note straight away.



e) Additional information

- Audit notes created by OPAS can not be verified (why would you want to)
- Temporary notes can not be verified until they have been committed

17. Printing medical notes

Menu: **Patients**

1. Patient demographics

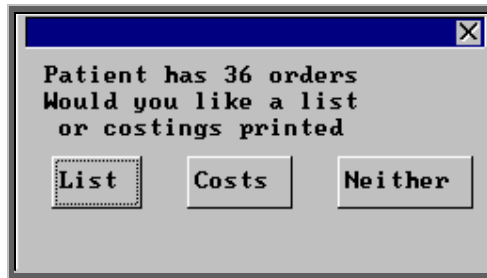


Click on the 'print' icon (File, Print) and select **Patient Information**.

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

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

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



List

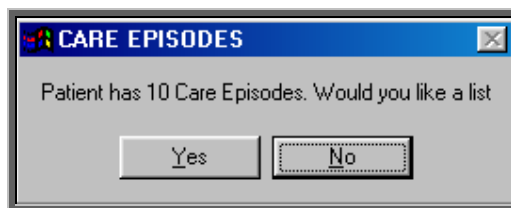
List prints a list of orders for that patient (Order number, Date of order and the general Description for that order).

Costs

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

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

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




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

2. Individual notes

a) General or care episode notes


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

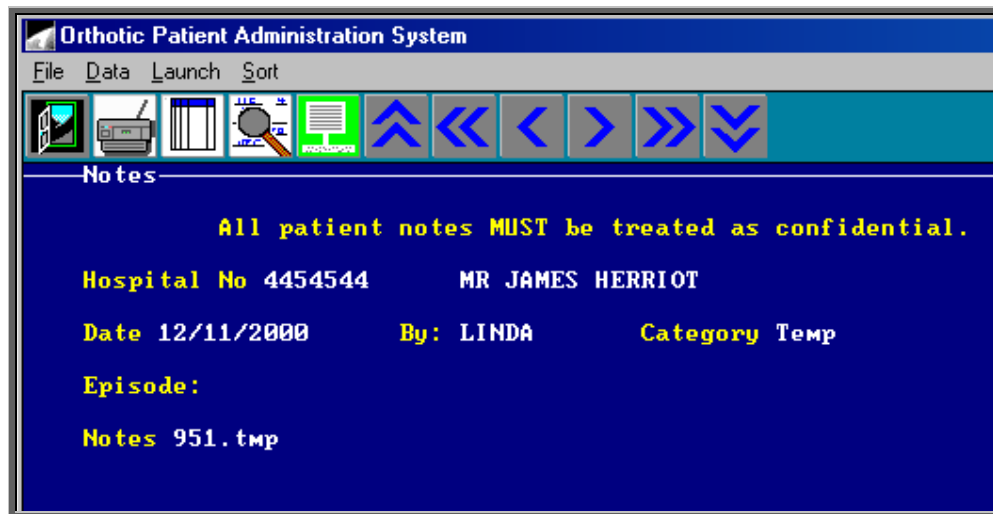
'notes' icon  (Goto, Notes)).

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

b) temporary notes

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

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



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


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


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


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

c) Letter notes

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

'notes' icon  (Goto, Notes)).

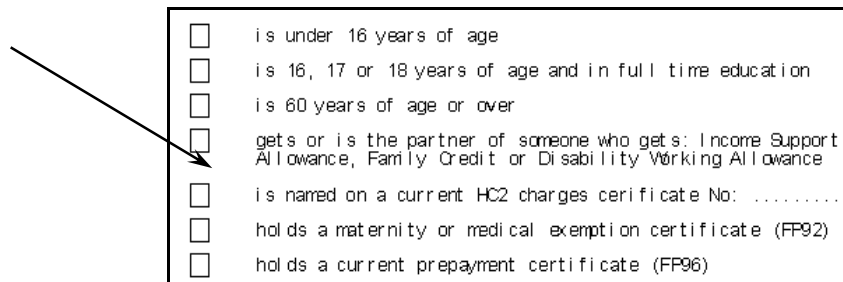
When you are looking at a letter note, click on the 'letter' icon  (Letter) to see the letter text.

If you wish to reprint the letter, click on the 'letter' icon  (Letter) to see the letter text.

18. Printing HSA5/WF1 Forms

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

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



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

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

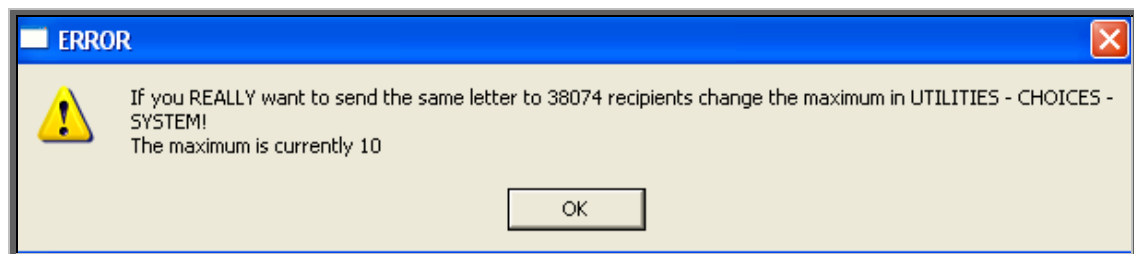
In case you haven't, we have included the font in OPAS and it can be found in q:\opas\font\webdings.ttf. Ask your IT department to copy the font into the location that fonts are held on your computer.

Menu: **Patients**

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



Click on the 'isolate' icon (This, Isolate) at the top of the screen. If you do not isolate the patient first, OPAS will think you want to send the letter/form to all your patients. Don't worry, there is a safety net in the System parameter screen to set the maximum number of patients allowed on a mail merge and if you did forget to isolate the patient, you would get the following message.



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


Select **Letter**

Highlight the form you wish to produce from the list provided











Select the number of copies required

Highlight **Yes** to continue and press **Enter**

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

To be able to see all the patient records again click on the 'unisolate' icon  (This, Unisolate).


At any time you can look at the patient's letter log, to find what letters have been sent and when. Simply click on Goto, Letters at the top of the **Patient** screen.

										
Date	Filename	Hospital No	description							
25/11/2007	WF1	NG54367	Wig letter							
23/11/2007	LETTERA	NG54367	Appointment letter type A							

19. GP

Menu: **Patients**



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

Orders

- 1. Introduction**
- 2. Adding an order**
- 3. Adding a repeat order**
- 4. Amending an order**
- 5. Printing orders as they are raised**
- 6. Faxing orders as they are raised**
- 7. Printing/Faxing orders in batch**
- 8. Re-printing a batch of orders**
- 9. Re-printing individual orders**
- 10. Re-faxing individual orders**
- 11. E-mailing orders**
- 12. Re-emailing orders**
- 13. Deleting an order**
- 14. Receiving an order**
- 15. Holding an order**

- 16. Entering fitting notes**
- 17. Returning goods**
- 18. Supplying an order**
- 19. Progress**

1. Introduction

Official orders can be raised on OPAS for the purpose of purchasing orthotic items for your patients. Once raised, these can be printed for sending to suppliers or can be faxed or e-mailed directly to your suppliers from OPAS (if you have the necessary fax hardware/software installed).


Throughout OPAS you will see Orders being referred to as History. This is because the details of the orders, which can be seen on the patient record, are providing a history of that patients past and current care.

Once an order has been raised you are able to track its progress by recording further information e.g. when the goods were received, when the goods were supplied to the patient and when the invoice for the items have been passed to Finance for payment.

It is these orders that will provide the information for producing a variety of management reports available within OPAS. The reports will only be as good as the data that has been entered, so the more information that is entered the more information you will be able to retrieve.

The following chapter will explain the options available from the **History** option on the main menu. However, it needs to be pointed out that there are actually two ways of finding an order.

1. using **Patients** – Goto, History, Current:

firstly find the patient, then click on the 'order' icon  (Goto, History, Current) to go to the current orders for that patient

2. using **History** – **Orders**:

find the order.

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

When updating an order it does not matter which way is used to find it. You will find which way is quickest/easiest as you become more familiar with using OPAS.

2. Adding an Order


Although most of the order maintenance is carried out in **History**, new orders can only be entered from the **Patients** screen.

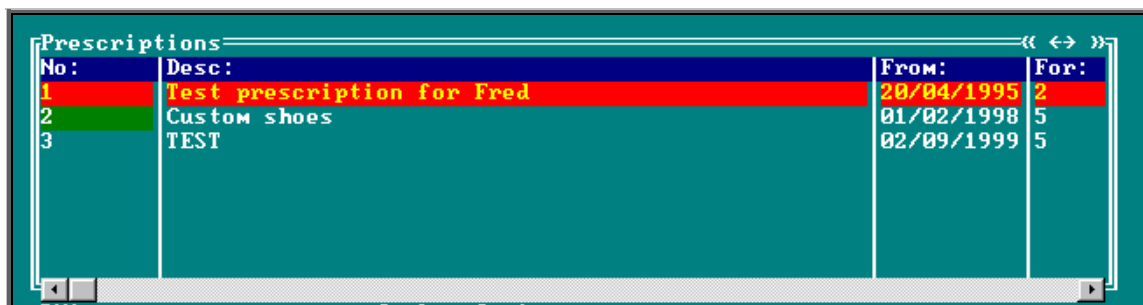
Menu: **Patients**

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

If you are not using prescriptions move onto step 2

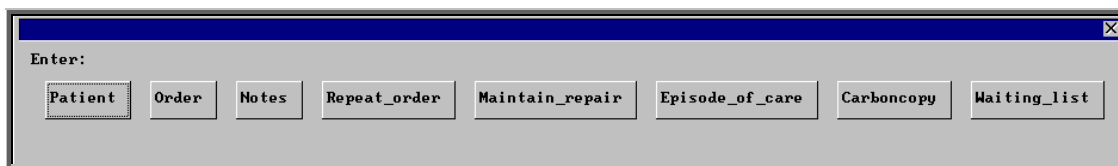
If you are using prescriptions you will then have to select which prescription this

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




No:	Desc:	From:	For:
1	Test prescription for Fred	28/04/1995	2
2	Custom shoes	01/02/1998	5
3	TEST	02/09/1999	5

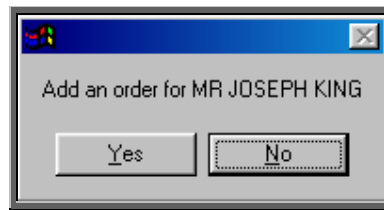
Click on the 'enter' icon  (**E**dit, **E**nter) and the box below will appear. ←



Enter:

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

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



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

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

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

<i>Hospital No</i>	Hospital No will be brought through from the patient record.
<i>Patient</i>	Patient name will be brought through from the patient record.
<i>Sex</i>	(M)ale or (F)emale will be brought through from the patient record.
<i>DOB</i>	DOB will be brought through from the patient record.
<i>Purchaser</i>	Purchaser will be brought through from the patient record but if you need to change it press the Tab key to see the list of your purchasers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>Date of Order</i>	Today's date will automatically be entered. You can overwrite with another date if required.
<i>Order Number</i>	The next sequential number will automatically be entered in this field if an order number formula has been created (see Utilities - Note 21. Order numbers). You can overwrite this as long as the order number you type is unique (i.e. has not been used before and is unlikely to be automatically offered on a future order).
<i>Supplier</i>	Select the supplier you are ordering the goods from. (If the supplier does not appear in the pop-up list they will need to be added in Utilities – NSI – Suppliers.) A default can be set for this field in Utilities – Choices – Defaults.
<i>Cross Ref or Hsp Order No</i>	This is an optional field where you may wish to quote a supplier's reference number or an internal reference number. If a blanket order number has been assigned to the supplier, this will appear automatically in this field.

<i>Description</i>	50 characters available to describe in simple words what the order is for. This description can appear in appointment letters so should be terminology understood by the patient. As well as being able to free type in this field you can also select a description from a pop-up list by pressing the Tab key. (Standard descriptions to appear in the pop-up should be set up in Utilities – Choices – History – Descriptions)
<i>Orthosis Code</i>	This is a mandatory field. You must select a code from the pop-up list. (Orthosis codes to appear in the pop-up should be set up in Utilities – Choices – Orthosis Codes)
<i>Referrer</i>	Referrer will be brought through from the patient record but if you need to change it press the Tab key to see the list of your Referrers and make an alternate selection. Otherwise press the Enter key to move to the next field.
<i>In-patient:</i>	Type N for No or Y for Yes.
<i>Paid</i>	If the patient has to pay a prescription charge for the goods, the date they pay can be entered here in the format DD MM YYYY. To leave this field blank press the Enter key.
<i>Receipt:</i>	If the patient has to pay a prescription charge for the goods, the receipt number can be entered here.
<i>Amount:</i>	If the patient has to pay a prescription charge for the goods, the amount they paid can be entered here.
<i>Pres No:</i>	If you are using Prescriptions, the prescription that the order is linked to will automatically appear here.
<i>Expected</i>	This date will be calculated from the Orthosis Code that was entered
<i>Supply Date:</i>	above. When the Orthosis codes are set up there is the opportunity to say how long that type of item takes to be delivered. If an Orthosis Code has been set up with a delivery of 7 days, the <i>Expected Supply Date</i> will show as 7 days from today's date. If the delivery field is not used when the Orthosis Code is set up, the <i>Expected Supply Date</i> will show as today's date. The date that appears can be overtyped with another date if required.
<i>ACO</i>	What you enter here will determine what OPAS will do when you book the goods in as being received. A if the order will need an appointment to be made for fitting. When the order is received from the supplier, the system will automatically make an appointment.

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

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



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



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

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

A default can be set for this field in **Utilities – Choices – Defaults**.

<i>Time</i>	If you enter A in the <i>ACO</i> field, you must indicate how long an appointment the patient will need. The default length of your appointments (as set in Utilities – Choices – System) will automatically appear in the <i>Time</i> field but this can be overtyped.
<i>Clinic</i>	If you enter A , C or T in the <i>ACO</i> field, you must say which clinic venue they need to attend or collect the goods from. A pop-up list will give you your available options. (Clinic venues to appear in the pop-up should be set up in Appointments – Venues)
<i>Clinician</i>	If you enter A in the <i>ACO</i> field, you can state which Clinician they need to see. If the patient can see any Clinician then leave this field blank. If you have entered a Clinician on the Patient record, this will show through onto the order. If you need to add/edit the Clinician, press the Tab key to see the list of options.
<i>Day</i>	If you enter A in the <i>ACO</i> field, a day of the week can be specified for the appointment. Press the Tab key to see the list of options. If you enter a day here, when the goods are booked in and OPAS finds the next available appointment, it will only look for available appointments on that day. Therefore, care should be taken that you do not enter a mismatch here i.e. by saying that they need to see Mr Clinician on a Monday when Mr Clinician only has a clinic on a Friday.
<i>APE</i>	If you enter A in the <i>ACO</i> field, you can specify whether the appointment made should be an AM , PM or Evening appointment.
<i>Letter:</i>	If you enter A or C in the <i>ACO</i> field, you can state which letter type will be required. The field will default to your default standard appointment/collection letter (as set in Utilities – Users/Appointments – Venues) but can be overtyped with an alternate letter template/
<i>Transport</i>	If you enter A in the <i>ACO</i> field, you can state which type of transport the patient needs, if any. If you have entered Transport details on the Patient record, this will show through onto the order.
<i>Care Episode</i>	<p>If a care episode has been created for this patient, the order can be linked to the care episode by entering the care episode reference number. Press the Tab key to see the list of care episodes for the patient. If the pop-up list is empty, there are no current care episodes for the patient.</p> <p>More than one order can be linked to a care episode. When the goods are booked in against an order, if the <i>ACO</i> field has been set</p>

to **A** (Appointment) or **C** (Collection) an appointment or collection letter will not be produced until all the orders quoting that care episode have been received.

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

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

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

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

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

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

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

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

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

S standard
E exempt
Z zero-rated
R reclaim.

The VAT field will default to the vat code held against the item code but you can overtype this with an alternate VAT rate. If you have not entered an item code, the VAT code will default to S.

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

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

If the price does not appear automatically it will have to be entered manually. If this is an item you order regularly you can add the price as a Non Scheduled Price (**Utilities – NSI – Prices** *see Utilities - Note 29. NSI*) so that the price will appear automatically in future.

If the supplier of the order trades in another currency other than pound sterling (£), then the value should be entered in the suppliers currency.

Enter as many lines in the detail section as are needed, but you **must** press **Enter** after entering the *Price*, so that the highlight moves on

to the next line. If you don't, background calculations are not carried out by the system and problems may occur in the calculation of VAT. Once you have entered the last line it is safest to press **Enter** to move the highlight into *Code*, then **Enter** again to move it into *Description* then **Enter** again to move it into *Notes*.

Notes Any additional information can be entered here.

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

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

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


3. Adding a repeat order

If you need to add an order to a patient when they have already had an order for a similar orthosis, rather than enter the whole order from scratch, enter a repeat order. Repeat orders are not an available option for those using prescriptions where each order has to be linked to a valid prescription when raised.


Menu: **Patients**

Find the patient who you wish to add a repeat order for.

Firstly, select which of the patient's previous orders you would like to repeat. To do

this, press the 'arrow' icon  (**PgDn**) so that you can see the order table. Select the relevant prescription by clicking on it with the mouse so that the green highlight appears. (Alternatively press **Alt-T**, select Order and move down the list with the arrow keys.)

Orders					« ↔ »
Date of Or	Order No	Sup	Desc	Received	
22/10/2003	G00418	189	Repairs		
20/07/2002	G00414	078	Shoes	21/08/2002	

Now click on the 'enter' icon  (**E**dit, **E**nter) and the box below will appear.

Enter:

Patient

Order

Notes

Repeat_order


Maintain_repair

Episode_of_care

Carboncopy

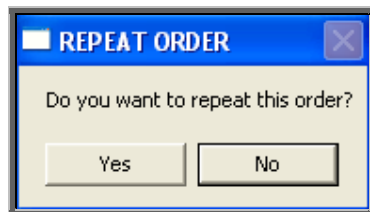
Waiting_list

Note: If Repeat Order is not an available option you are either in the 'short' Patient screen or you are set up for prescriptions. To change back to the 'long'

Patient screen, click on the 'swap' icon  (**E**ile, **S**wap)

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

You will be shown the original order and asked to confirm that this is the order you wish to raise a repeat order on.



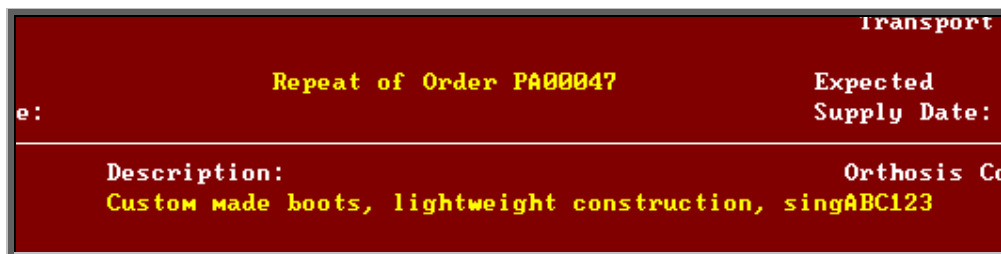
Click on **Yes** to continue.

At the bottom of the screen you will be offered the next order number in the sequence. Press **Enter** to accept this number. If you choose to alter the order number offered, ensure the number has not been used before, or is not one that may be offered in the future.



You will then be taken into the new order which will be a copy of the original.

Repeat order information will appear just above the **Detail** table. This field can be included on the printed order if the suppliers would find it useful.



Move through the order to make any necessary changes.

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

4. Amending an order

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

1. From the patient screen

Menu: **Patients**

Find the patient whose order you wish to amend.



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



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



the 'update' icon (Edit, Update).

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

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

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

<i>Purchaser</i>	<i>Day</i>
<i>Supplier</i>	<i>Transport</i>
<i>Description</i>	<i>Care Episode</i>
<i>Orthosis Code</i>	<i>Code</i>
<i>Referrer</i>	<i>Technician</i>
<i>Clinic</i>	<i>Ward</i>
<i>Clinician</i>	

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

2. From History

Menu: **History – Orders**



Find the relevant order and then click on the 'update' icon (Edit, Update).

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

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

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

<i>Purchaser</i>	<i>Day</i>
<i>Supplier</i>	<i>Transport</i>
<i>Description</i>	<i>Care Episode</i>
<i>Orthosis Code</i>	<i>Code</i>
<i>Referrer</i>	<i>Technician</i>
<i>Clinic</i>	<i>Ward</i>
<i>Clinician</i>	

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

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

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

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

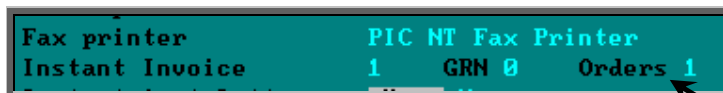
So if you know the order number, it is quicker to use **History – Orders**; if you only know the patient, it is quicker to use **Patients** – Goto, History, Current.

5. Printing orders as they are raised

There is a switch in the system parameters that will result in orders being printed instantly i.e. as they are raised. This is an alternate method to batch printing ([see Orders - Note 7. Printing/Faxing orders in batch](#)). This function is not intended to be used if you are set up for faxing orders as the order will print regardless.

There is also the facility to e-mail orders direct to the supplier as they are raised ([see Orders - Note 11. E-mailing orders](#)).

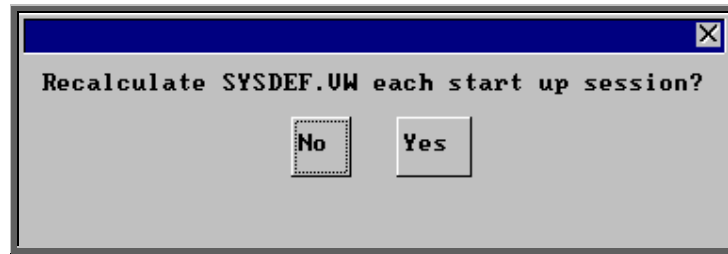
If you want each individual order to print automatically when you have finished inputting it, go into **Utilities – Choices – System** and enter the number of copies required in the *Orders* field.



Fax printer	PIC NT Fax Printer
Instant Invoice	1 GRN 0 Orders 1

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

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




Press the **Enter** key.

Even though you have set the number of copies to instant print in the System parameter screen, if you have specific purchasers or specific suppliers that require additional copies to be printed, this can be automated.

a) Printing additional copies for a supplier

Menu: Utilities – Choices – Finance – Accounts


To request additional copies for a supplier, click on the ‘enter’ icon  (Edit, Enter).

Select the relevant supplier from the pop-up list and move down to the *Copies* field. Enter the number of **additional** copies required. This will then work for both stock and patient orders.

b) Printing additional copies for a purchaser

Menu: Utilities – Choices – Purchasers

To request additional copies for a purchaser, find the relevant purchaser and

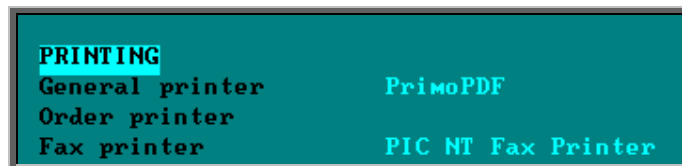
click on the ‘update’ icon  (Edit, Update).

Move down to the *Copies* field, and enter the number of **additional** copies required. This will then work for just patient orders (Stock purchase orders are not assigned to a purchaser).

6. Faxing orders as they are raised


Individual suppliers can be set up to have their orders faxed directly to them.

To be able to fax orders direct to the supplier, your computer must have a fax driver and this needs to be entered in the *Fax printer* field in the system parameters screen (**Utilities – Choices – System**)



Menu: **Utilities – Choices – History – Fax**

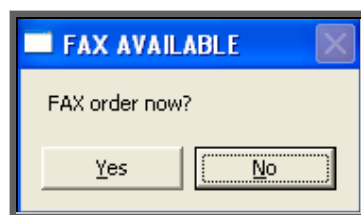
If you wish to fax orders to all suppliers then leave this screen blank. Otherwise, specify those suppliers you wish to fax to by adding them in this screen.

To specify particular suppliers for faxing, click on the 'enter' icon  (**E**dit, **E**nter).

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

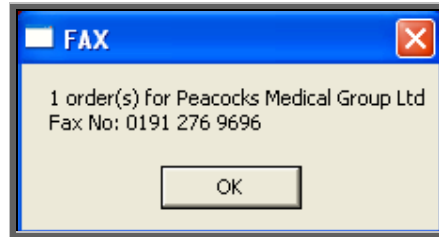
That supplier will be added and the pop-up list will appear again to choose another supplier. Continue to select suppliers until you have specified all those that you wish to fax to. Then press **E**sc to remove the pop-up list and then press **E**sc twice more to come out of the **Fax** screen.

Once a supplier has been identified as a fax supplier, whenever an order for that company is entered onto OPAS, you will be asked after completing the order if you would like to fax it straight away.



If **No** is selected, you will still have the opportunity to fax the order later in batch or individually.

Select **Yes** to fax the order.



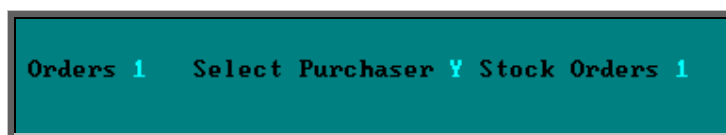
On clicking **OK**, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

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

7. Printing/Faxing orders in batch

Orders can be printed in batches (e.g. at the end of the day). This is useful where special stationary is needed or the printer is shared. The standard setting for batch printing is that OPAS will find all the unprinted orders that you have entered over the last 14 days. However, if it is more appropriate, OPAS can be set to give you the option to print all unprinted orders for a particular purchaser, regardless of who entered the order on to the computer.

If this is the case go to **Utilities – Choices – System** and within the Printing section set the *Select Purchaser* field to **Y**.



If *Select Purchaser* is set to **Y**, when you batch print orders, you will be asked to select which purchaser (from the pop-up list) you want to print.

Batch Orders	
Purchaser	
Purchaser	Reference
NHS TRUST	1
GP Fundholder	2
Primary Care Group	3

If you want to print all orders for all purchasers, simply press **Esc** at this screen.

Menu: History – Orders

a) Printing to the printer



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

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

Printing 7 orders. How many copies?									
1	2	3	4	5	6	7	8	9	0

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


ORDER(S) PRINTED	
Mark order(s) as printed?	
Yes	No

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

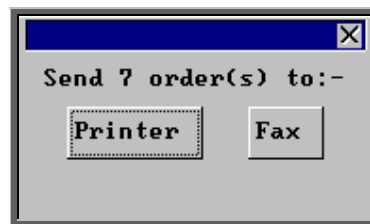
If you accidentally mark the orders as printed when they didn't actually print successfully **see Orders - Note 8. Re-printing a batch of orders.**

b) Faxing orders direct to suppliers

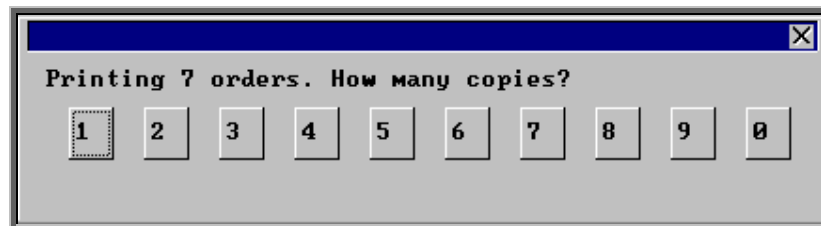
Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen (**Utilities – Choices – System**)

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

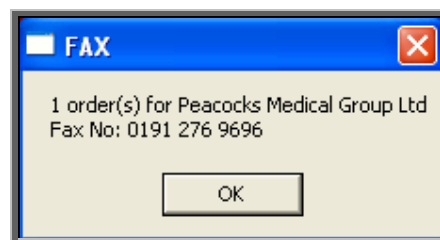
The system finds those orders that have not yet been printed and asks whether you wish to print or fax them.



If you select the **Printer** option by clicking on the **Printer** button with the mouse or by typing **P**, then you will be asked how many copies you require.



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

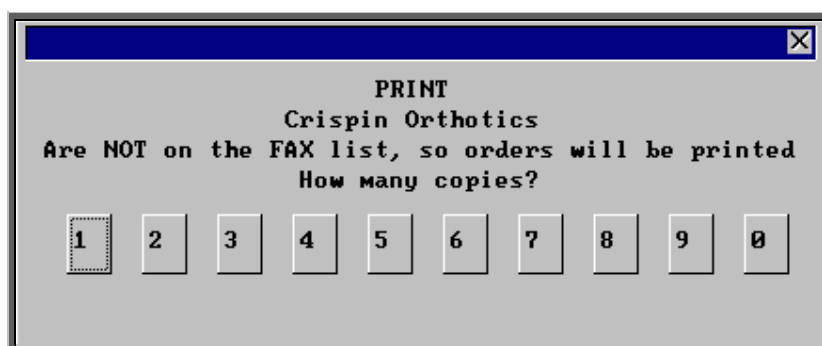


On clicking OK, your fax software will be launched. The fax number can then be typed into the send fax screen of your fax software.

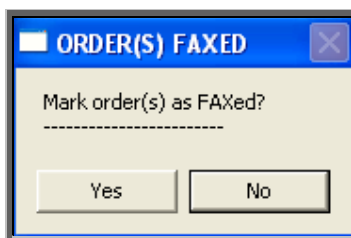
The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax number when the above box appears in case this should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

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

If orders are found for companies that are not set up for faxing (**Utilities – Choices – History – Fax** ([see Utilities - Note 6. Choices - History - Fax](#))), the following prompt will appear.



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



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

8. Re-printing a batch of orders

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

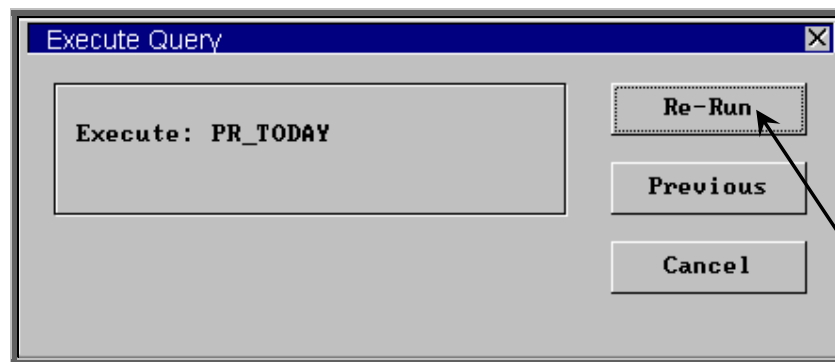
Menu: **History – Orders**

Click on Data and then Query

Click on This_view

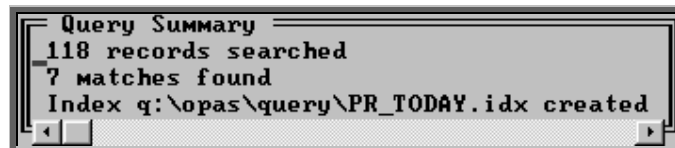
Using the down arrow key move the green highlight until it is on PR_TODAY

Click on Run




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

Click on Run or Re-Run.



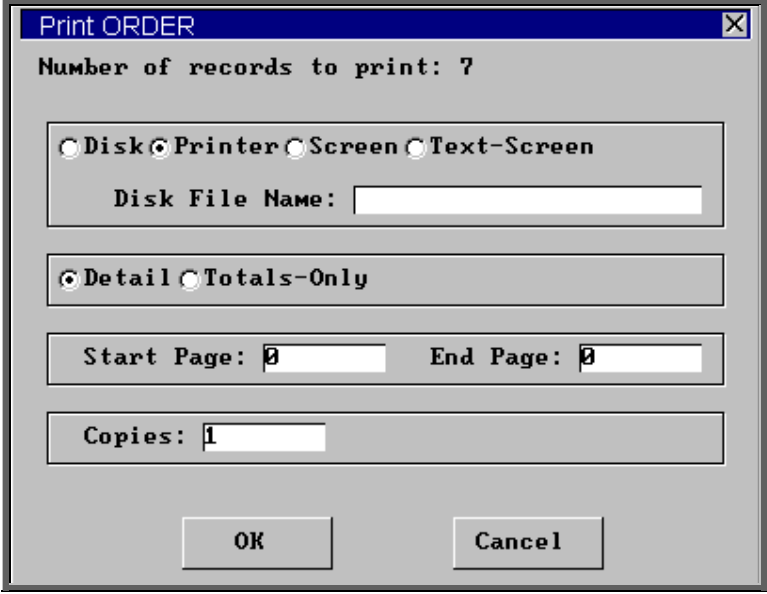
A Query Summary box will appear in the middle of the screen when it has found those orders where the printed date was today.

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

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


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

Click on Run.

A screenshot of a 'Print ORDER' dialog box. The title bar is blue with the text 'Print ORDER' and a close button. The main area is grey. It contains the text 'Number of records to print: 7'. Below this is a group box with four radio buttons: 'Disk', 'Printer' (selected), 'Screen', and 'Text-Screen'. Below the radio buttons is a text field labeled 'Disk File Name:'. Another group box contains two radio buttons: 'Detail' (selected) and 'Totals-Only'. Below this is a row of two text fields: 'Start Page: 0' and 'End Page: 0'. Below that is a text field labeled 'Copies: 1'. At the bottom are two buttons: 'OK' and 'Cancel'.

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

Note: Until you come out of the **Order** screen, the only orders you can see are those that you have just reprinted. To see all the orders again, either come out to a menu

and back into the option, or click on the 'ABC' icon  (Sort, Physical).

9. Re-printing individual orders

If you have lots of orders to print it is best to print them in batch (*see Orders - Note 7. Printing/Faxing orders in batch*), as this is much quicker. There are occasions however, when you want to print/reprint just one order.

Menu: **Patients**

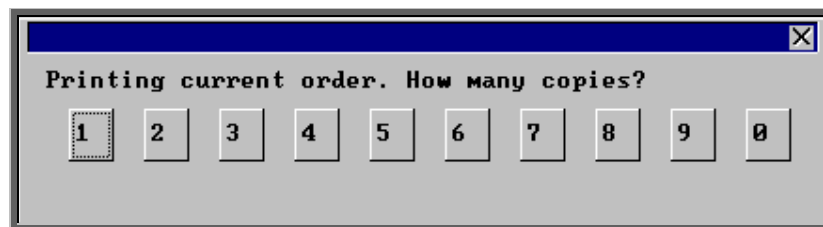
Find the patient whose order you wish to print.



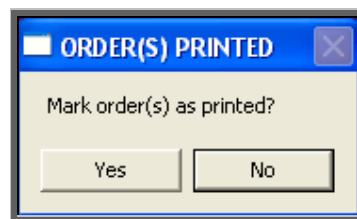
Click on the 'orders' icon (Goto, History, Current) to show the current orders for that patient.



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



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



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

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

10. Re-faxing individual orders

Note: To be able to fax orders direct to the supplier, the fax driver information must be entered in the *Fax printer* field in the system parameters screen and the supplier be set up as a fax supplier. (*see Orders - Note 6. Faxing orders as they are raised*)

Menu: **Patients**

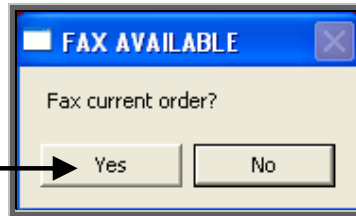
Find the patient whose order you wish to fax.



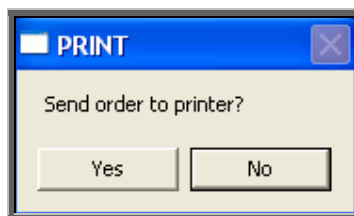
Click on the 'orders' icon (Goto, History, Current) to show the orders for that patient.



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

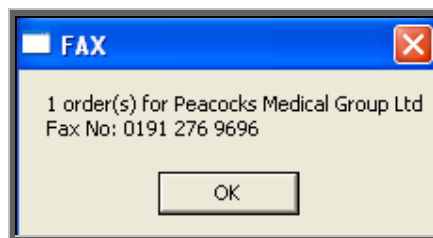


The above prompt will appear. If you do not want to fax the current order, and say No, the following prompt will appear.



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

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



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

The supplier number should remain at the bottom of the **Order** screen until the fax is sent. We are aware though that some fax software clears the fax number from the **Order** screen prematurely, so it would be advisable to make a note of the fax

number when the above box appears in case this should happen. Once you know that the number remains, you will not have to make a note of the number in future.

Once the fax has been sent, you will be asked if you wish to mark the order as faxed.

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

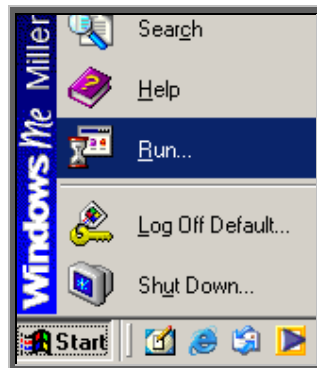
11. E-mailing orders

As well as being able to fax orders direct to suppliers, you also have the ability to e-mail orders directly (as long as you have e-mail on your computer!).

Setting Up

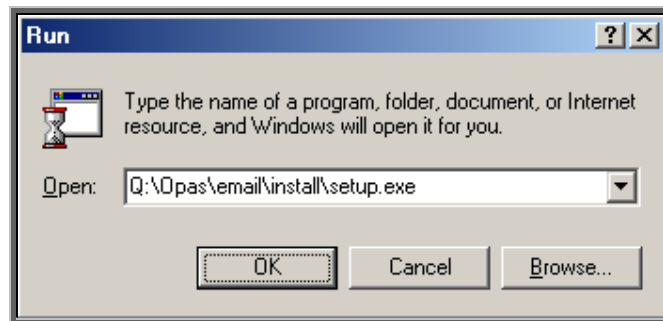
Step 1. Installing the e-mail daemon

The e-mail daemon acts as an interface between OPAS and your e-mail software and has to be installed on each computer that is to e-mail orders.

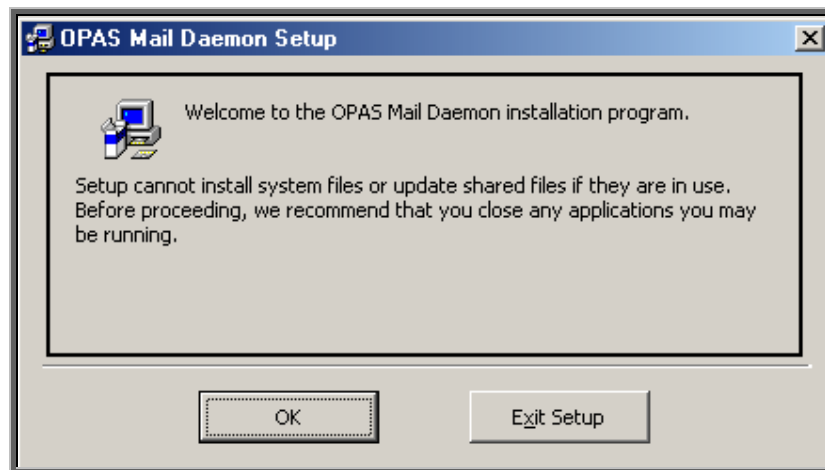


Use the **R**un option on your Start button to select
Q:\Opas\email\install\setup.exe.

If you are not familiar with this part of your computer, or the Run option has been disabled, IT should be able to do this for you.

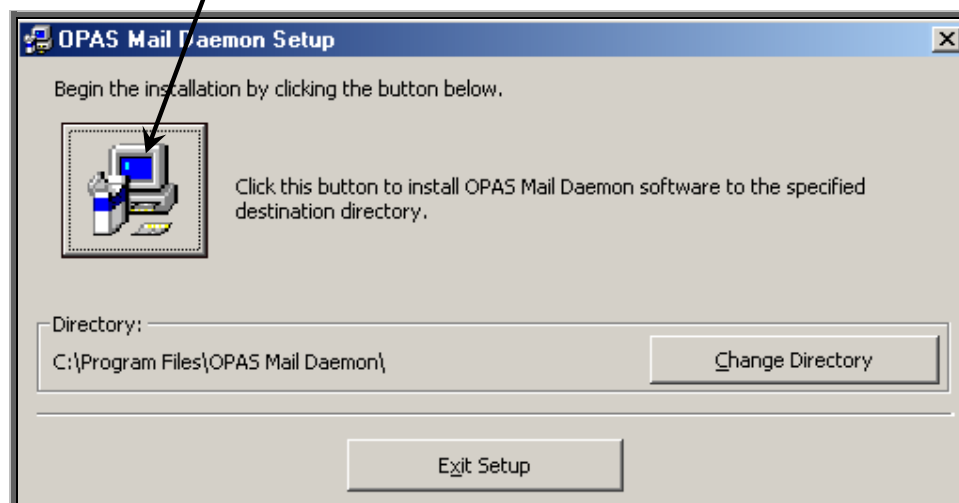


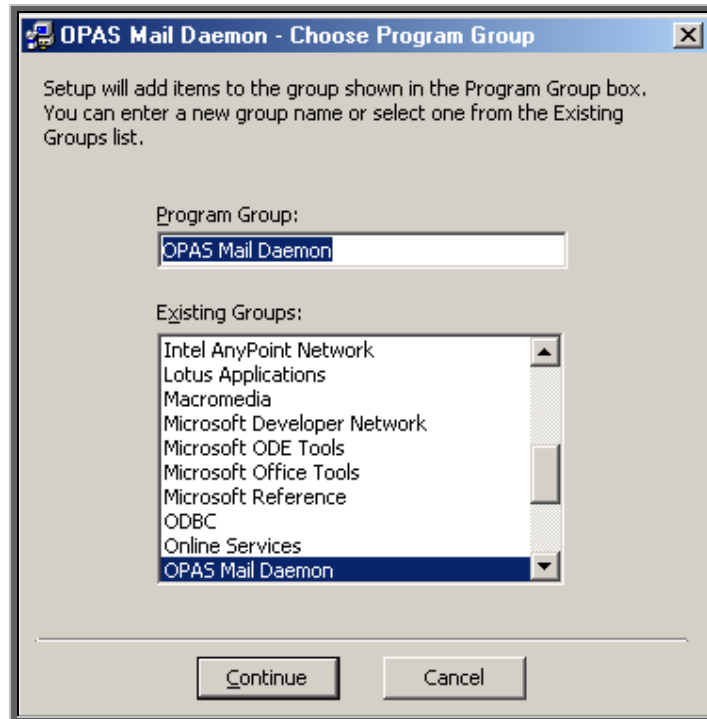
Click on OK to continue.



Click on OK to continue.

Click here to continue





Click on Continue.

A couple of boxes will appear while the installation procedure is carried out.

When it is complete, the following message will appear.



Click on OK.

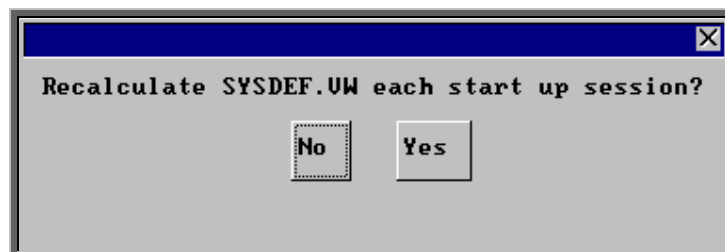
Don't forget – this needs to be done on each computer that you want to e-mail orders from.

Step 2. Switching e-mail on in OPAS

Go into **Utilities – Choices – System**. Press the **Page-Down** key and update the *Email Orders* field to read c:\daemon\.




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



Step 3. Identifying which suppliers are to receive e-mails.

Menu: Utilities – Choices – History – E-mails.

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

Code enter the supplier code, using the pop-up list to help you

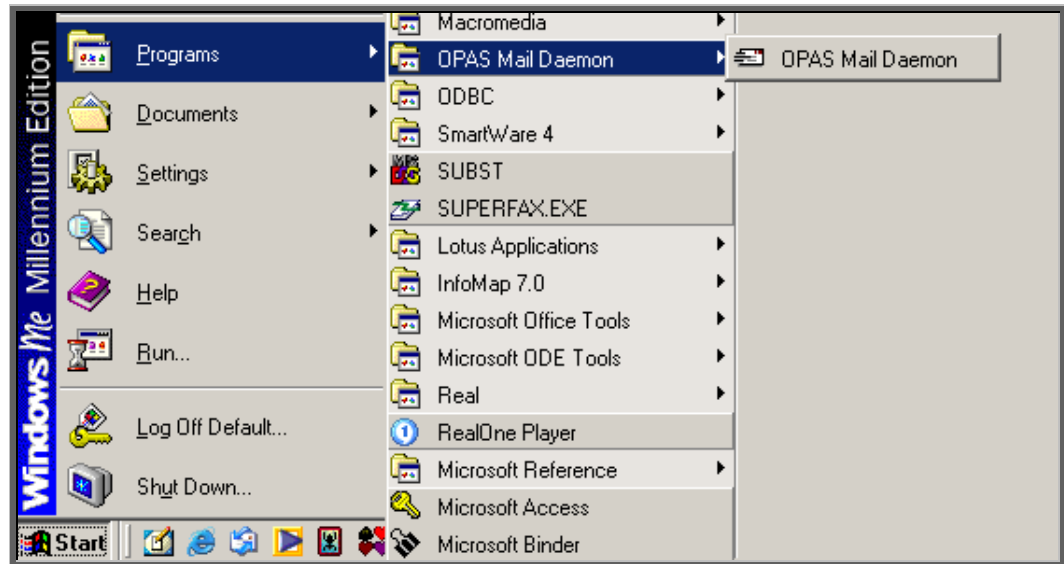
Address: enter the e-mail address for the supplier

Enter the details for all those suppliers that you wish to e-mail orders to. If the supplier is not entered here, OPAS will not offer the option to send an e-mail. However, if a supplier is entered here and you don't wish to e-mail a particular order when prompted, you can always say no to the prompt and print the order instead. Therefore, even suppliers that you want to e-mail occasionally would need to be entered here.

Using the e-mail function

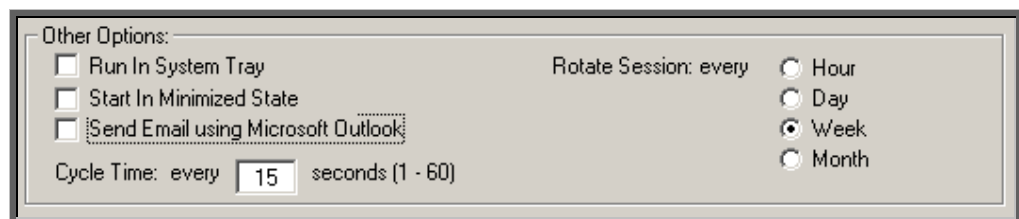
Step 1. Switching on the OPAS daemon.

The OPAS daemon needs to be open in order to take e-mail orders from OPAS to your e-mail software as they occur. To open the e-mail daemon, use the **Programs** option on your **Start** button to select **OPAS Mail Daemon** and then **OPAS Mail Daemon** again.



Alternatively you may wish to set up an icon on your desktop, or include it in your Windows Startup.

The first time you open OPAS Mail Daemon, click on the Options button. If you are using Microsoft Outlook, ensure the third box of the Other Options section is checked. You may also want to check the second box on Other Options so that the daemon starts minimized and sits on your taskbar out of the way.



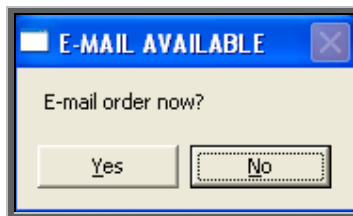
If you check any of the boxes, ensure you click on the **Save** button.

The OPAS Mail Daemon will now sit in the background doing its job, but will need to be closed at the end of the day, or when you stop using OPAS.

Step 2. E-mailing orders

Add your order in the usual way. When you finish adding the order, OPAS will check whether the order is for a supplier that you have set up for e-mailing (see Setting Up – Step 3 above).

If it is, you will be asked if you wish to e-mail the order.



If you do not wish to e-mail the order, click on **No**.


If you do not e-mail the order now, you can always do it later.

If you wish to e-mail the order, click on **Yes**. The order will be sent to the OPAS Mail Daemon and then on to your e-mail software. If your e-mail software is not currently running, it is likely that it will prompt you to open your e-mail system so that the order/message can be sent.

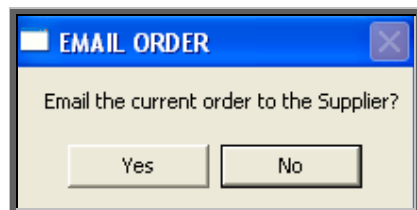
The order will be marked at the bottom with the date it was e-mailed. The printed date remains blank, which means that the order will be printed when printing orders in batch, but it will have a banner on it indicating that it is a confirmation of an e-mailed order. If you would prefer that e-mailed orders were not printed when batch printing, contact the Helpdesk.

12. Re-emailing orders

If an order is not e-mailed when it is raised, or if you wish to e-mail an order again, this can be done by finding the order (either from the **Patient** screen or via **History –**

Orders) and clicking on the 'print' icon  (**F**ile, **P**rint).

Select **Email** from the **Print** menu.




Click on **Yes** to continue.

Note: Orders can only be e-mailed to suppliers that have been set up in **Utilities – Choices – History – E-mails**.

13. Deleting an order

Menu: History – Orders

Find the relevant order and then click on the 'delete' icon  (Edit, Delete).

You are asked to confirm deletion of the order.



If you select **Yes**, you will be asked at the bottom of the screen to enter a reason for cancelling the order.

Printed email	Ward
Reason for cancelling order: <input type="text"/>	

It is not mandatory to enter anything, but information typed in here will appear in the progress screen. (The **Progress** screen can be accessed by clicking on the word **Progress** above the icons on the **Order** and **Invoice** screen.)

Date	A	Action:	GRN	Reason
17/06/2008	C	ancelled		order added to wrong patient
09/10/2007	O	rdered		

The record is now deleted, but remains on the system. The message **Order cancelled** will appear above the *Description* field to indicate that it has been marked for deletion.

History	
Hospital No	Patient
NTORUS0077	MRS MURIEL SELBY
Purchaser	Date of Or
1 NHS TRUST	27/04/2008
Supplier	144 Crispin Orthotics
Purchase Card:	Order cancelled
Description	Shoes

Note: Once an order is cancelled the details will not appear on any reports.

If you want to permanently remove the order from OPAS so that there is no longer any record of it, this can be done by clicking Edit, Krunch.

Warning: Edit, Krunch will remove **ALL** orders that have been marked as deleted (i.e. cancelled) and **cannot** be reversed.

Un-cancelling an order

If you need to un-cancel an order, find the relevant order and then click on the

‘delete’ icon  (Edit, Delete) again.

You are asked to confirm that the order is to be un-cancelled.

UN-CANCEL	
Do you really want to un-cancel this order?	
Yes	No

Again you will have the option to enter a reason, and the progress screen will be updated.


email
Reason for un-cancelling order: ■

Date	A	Action:	GRN	Reason
17/06/2008	U	ncancelled		wrong order cancelled
17/06/2008	C	ancelled		order raised for the wrong patient
09/10/2007	O	rdered		

14. Receiving an order


This option is used to mark an order as having been received from the supplier. If only part of an order is received, then the order should not be received until the rest of the order has arrived.

Menu: History – Orders


Find the relevant order and then click on the 'goods in' icon  (Goods, In).

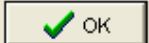
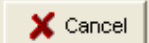
Delivery note numbers can be recorded if the flag is switched on in the system parameters (see [Utilities - Note 15. Choices - System](#)).

Update after Pass	Yes	No
Pass for payment	0	
Record Delivery Notes	Yes	No



If the *Record Delivery Notes* field is set to **Yes**, the following prompt will appear.

Delivery Note: 

Enter the delivery note number and click on **OK**, or if there is no delivery note with that particular order simply click on **Cancel**.

(The delivery note number is held on the **Progress** screen, which can be accessed by clicking on the word **Progress** above the icons on the **Order** and **Invoice** screen.)

Depending on what was entered in the *ACO* field when the order was added, the following will then occur.

'A' entered in the *ACO* field

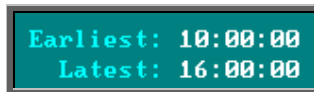
'A' is entered in the *ACO* field when the patient requires an appointment to be allocated when the goods have been received. Therefore, when you select Goods -

In, OPAS will search for the next available appointment based on the criteria entered on the order, i.e.

- length of appointment
- clinic selected
- Clinician selected (optional)
- day selected (optional)
- Morning/Afternoon/Evening appointment selected (optional)

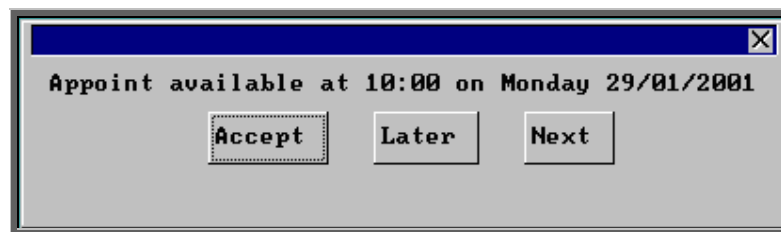
and also information held on the patient record

On the **Patient** screen, there are two fields that are connected with making appointments.

A screenshot of a computer screen showing two fields. The top field is labeled 'Earliest:' and contains the time '10:00:00'. The bottom field is labeled 'Latest:' and contains the time '16:00:00'. Both fields have a green background and black text.

If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.

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

A screenshot of a Windows-style dialog box. The title bar is blue with a close button (X) on the right. The main text area is grey and contains the text 'Appoint available at 10:00 on Monday 29/01/2001'. Below the text are three buttons: 'Accept', 'Later', and 'Next', each with a dashed border.

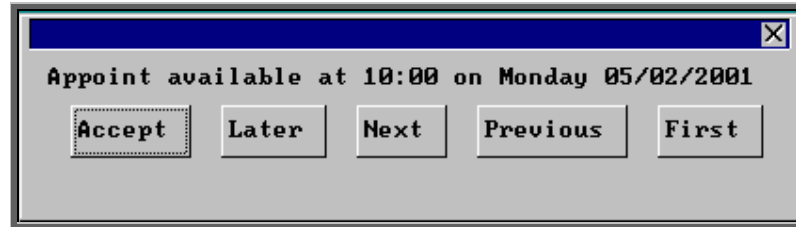
Accept If you are happy with the first date/time offered click on the Accept button with the mouse (type **A**).

Later If you would like an appointment on the date offered but would like it later in the day click on the Later button with the mouse (type **L**). If however, there are no more available appointments on this date you will be offered an appointment on the next date there is availability.

Next If the first date found is not suitable and you would like to find the next date there are appointments available, click on the Next button with the mouse (type **N**).

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

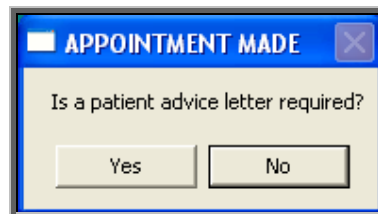
If you select Later and/or Next two more options become available.



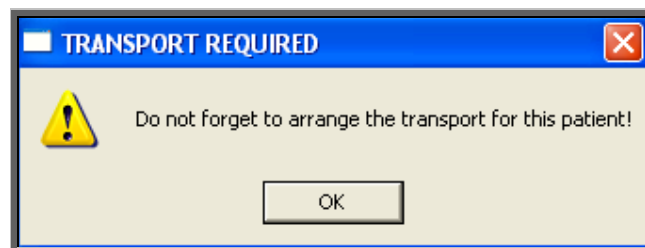
Previous Click on Previous (type **P**) to go back to the previous date offered.

First Click on First (type **F**) to go back to the First date/time that was offered.

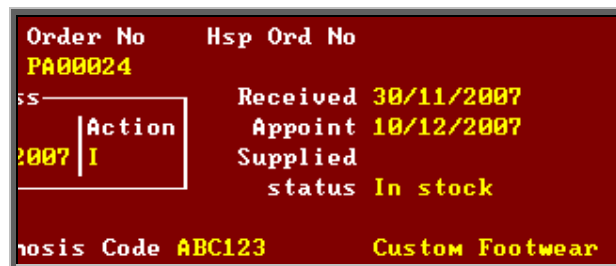
Once you have accepted an appointment date/time you will be asked if the patient requires an appointment letter.



If the patient requires transport, you are reminded to arrange it:



Having arranged the appointment you will be returned to the **Order** screen where the *Received* field will have been populated with today's date, the *Appointment* field with the date of the accepted appointment and the *Status* changed from On Order to In Stock.



Note: The appointment made will be shown as a fitting appointment i.e. F will be inserted in the *New* field on the appointment. If this is not



appropriate, click on the 'appointment' icon (Goto, Appointment) to take you to the appointment just made, and edit the *New:* field accordingly.

'C' entered in the ACO field

'C' is entered in the *ACO* field when a letter needs to be automatically generated, advising the patient that their items are ready for collection. Therefore, when you select Goods - In, OPAS will tell the appointment module that a collection letter is required by creating a dummy appointment against the next day that clinic is running.

These letters can be set to print instantly or subsequently be batch printed in **Appointment – Print – Letters**

The *Received* field will also be populated with today's date and the *Status* changed from On Order to In Stock.

'E' entered in the ACO field

'E' is entered in the *ACO* field when an appointment had already been made when the order was entered and no action is required when the goods are booked in. Therefore, when you select Goods - In, the *Received* field will be populated with today's date and the *Status* changed from On Order to In Stock.

'O' entered in the ACO field

'O' is entered in the *ACO* field no action is required when the goods are booked in. Therefore, when you select Goods - In, the *Received* field will be populated with today's date and the *Status* changed from On Order to In Stock.

15. Holding an order

Orders can be put on hold at any time.

Menu: History – Orders

Find the relevant order and then click on Goods, Hold at the top of the screen.

A dialog box titled "Reason for putting order on hold:" with a close button (X) in the top right corner. Below the title bar, it says "Click on 'Cancel' to abandon". There is a text input field. At the bottom, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Enter the reason that the order is being put on hold and click on OK.

The status of the order will change to On Hold.

A screen with a red background displaying patient information and order details. The text is as follows:

```

Sex      D O B
F 22/Apr/1966
Purchase      Cross Ref or
of Order Order No Hsp Ord No
07/2008 PA00146 4330007333
Progress
Date      Action
04/08/2008 H
Received
Appoint
Supplied
status On hold
  
```

When you look at the progress information you will be able to see the Reason for the hold if entered. The **Progress** screen can be accessed by clicking on the word Progress above the icons on the **Order** and **Invoice** screen.

Order	Date	A	Action:	GRN	Reason
PA00146	04/08/2008	H	old		Patient awaiting surgery
PA00146	21/07/2008	O	ordered		

16. Entering fitting notes

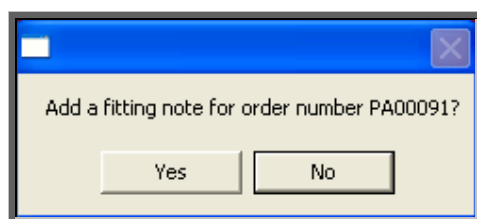
Fitting notes can be added to an order. As well as these notes providing information for administrative and clinical staff, they can be included in goods return notes (GRN) produced when goods are returned to the supplier.

Menu: **History – Orders**

If you wish to add a fitting note, find the relevant order and click on the ‘enter’ icon



(Edit, Enter).



Select **Yes** to continue to the fitting note screen where you can type in the required Note: Once the note is complete, press **Ctrl-Enter** to save. The fitting note will appear in a summary table at the bottom of the **Order** screen. Where multiple fitting notes have been added, the most recent will be at the top.

Paydate		Technician:	GPref
Printed	01/04/2008	Ward	PCG:
email			
Fitting Notes:			
Date:	By	Fitting Note:	
01/04/2008	LINDA	The left shoe needs to altered so that the heel is	

To view the notes in full, or to edit them click on **Goto – Fitting Notes** above the icons at the top of the **Order** screen.



An order's fitting notes can be printed by clicking on the ‘printer’ icon and selecting **Fitting Notes**.

New NHS Trust		
FITTING NOTES		
Greens Footwear Ltd		Order No. PA00099
868 Osmaston Road		Order Date 19/04/2008
Allenton		Job No. 4330007333
Derby		
DE24 9AB		
PATIENT 12345QWERTY		Clinic Orthotic Clinic
MR KELVIN BLOGGS		Ward Ward 1
Consultant	Mr Surgeon	Cost Code 111111
Directorate	PCT	Cost Centre 4199
Date:	By	Fitting Note:
16/05/2008	LINDA	To be finished off
08/05/2008	LINDA	Shoes to be returned to adjust heel on left

The fitting note report layout (fit_Note:dfn) can be altered to your requirements. Please contact the OPAS helpdesk.

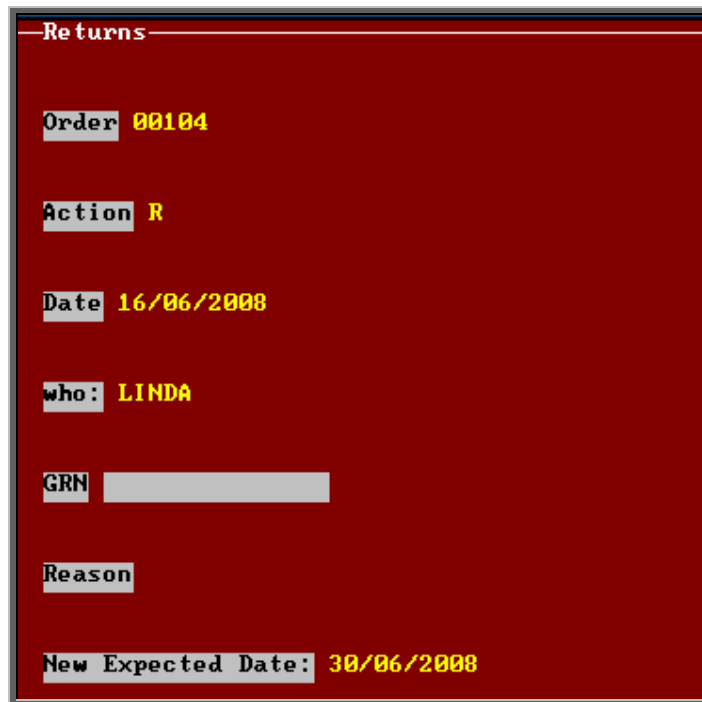
17. Returning goods

This option is used if goods need to be returned to the supplier, e.g. faulty or for finishing.

As well as updating the order, a Goods Return Note (GRN) can be produced if required.

Menu: History – Orders

Find the relevant order and then click on the word Goods at the top of the screen, and then select Return from the drop down menu.



Returns

Order 00104

Action R

Date 16/06/2008

who: LINDA

GRN

Reason

New Expected Date: 30/06/2008

- enter a *GRN* (i.e. a goods returns number issued by the supplier to quote on the return) if applicable
- select a *Reason* from the pop-up list. (To set up a pop-up list for your reasons, go to **Utilities – Choices – History – GRN Reasons**.) If the reason does not appear in the list, press **Esc** and type the reason into the field
- the *New Expected Date*: will be calculated for you based on the delivery applied to the Orthosis code on the order, but can be overtyped if necessary



If you require a goods return note, select **Yes** at this prompt. Otherwise select **No**.

Below is an example of a goods return note:

New NHS Trust		
GOODS RETURN NOTE		
M J Moss Surgical Shoemaking Dept. 58a Normandy Street Alton Hampshire GU34 1DE		Order No. PA00123
		Order Date 27/04/2008
		Job No.
PATIENT NTEMP000009		Clinic Orthotic Clinic
MS MARY LITTLE		Ward
Consultant Mr Surgeon		Cost Code ABC123
Directorate PCT		Cost Centre 4199
Schedule	Description	Qty
A135-80103BK	OPAL PODIABET SHOE 80-103 BLACK Sz 35	1
Reason for return		
To be finished off according to enclosed instructions.		
Authorising Officer _____		29/06/2008

The goods return note report layout (grn.dfr) can be altered to your requirements. Please contact the OPAS helpdesk.

When you look at the progress information you will be able to see the Goods Return Number and the Reason for return if entered. The **Progress** screen can be accessed by clicking on the word Progress above the icons on the **Order** and **Invoice** screen.

Note: If you will always need a Goods Returned Notification printing, then the GRN field in the System parameters can be set to the number of copies required.

PRINTING	
General printer	PrimoPDF
Order printer	
Fax printer	PrimoPDF
Instant Invoice	1 GRN 1

These will then automatically print after you have entered the reason without being prompted (see [Utilities - Note 15. Choices - System](#)).

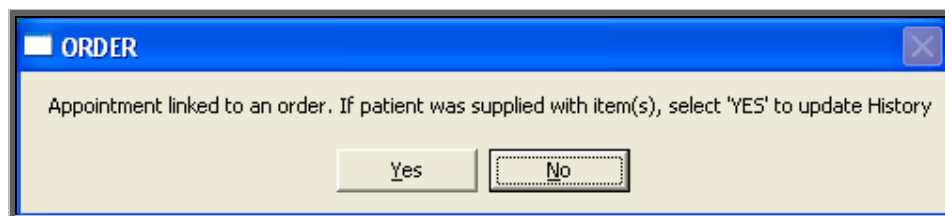
18. Supplying an order

Use this option to mark on the order when a patient is supplied or fitted with their goods.

If the patient was supplied while attending an appointment, if the appointment and order are linked then by marking the patient as attended can update the order automatically. Otherwise the order will have to be marked manually as supplied.

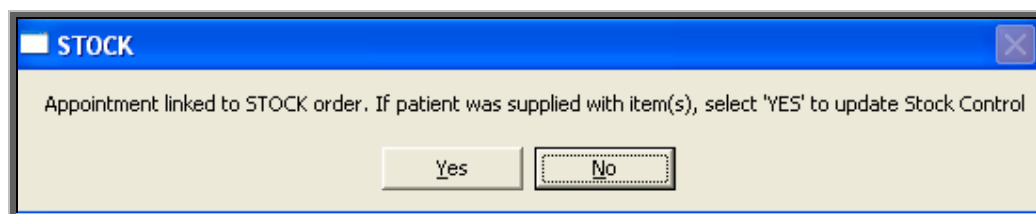
a) Through the appointment

If the patient is supplied while attending an appointment, as a part of logging the attendance of that appointment (by logging the patient's departure time or by inserting an appointment *Outcome* of Attended) you will be asked if the patient was supplied.



If **Yes** is selected, the order will automatically be updated as having been supplied.

If the item(s) have been supplied from stock, the Stock Control system and the order are updated if **Yes** is selected to the following prompt.



b) Manually

Menu: History – Orders

Find the relevant order and then click on the word Goods at the top of the screen, and then select Supply from the drop down menu.

Today's date will be entered into the *Supplied* field and the *Status* changed from In Stock to Supplied.

Purchase	Cross Ref or
Order No	Hsp Ord No
PA00132	
ss	Received 25/06/2008
Action	Appoint
2008 S	Supplied 26/06/2008
	status Supplied
hosis Code 11111	Other

If an order that is linked to a care episode is marked as **Supplied**, you will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.

FITTING

Order is attached to a CARE EPISODE.

Fitting date is currently BLANK

Would you like to update this?

FITTING

Order is attached to a CARE EPISODE.

Fitting date is currently 03/04/2008

Would you like to update this?

If you choose to update the fitting field, the calendar prompt will appear, so that a date can be selected. The calendar will default to today's date.

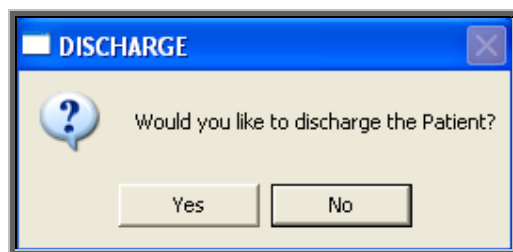
FITTING

February 2008

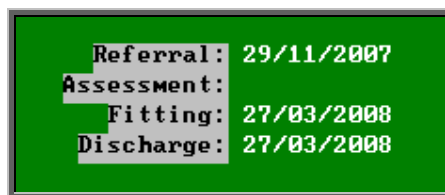
Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	1	2
3	4	5	6	7	8	9

Select required date

You then have the option to discharge the patient.



If Yes is selected, then the fitting date selected will also be entered into the *Discharge:* field on the care episode.



19. Progress

Menu: History – Orders or Menu: History – Invoices

On both the **Order** and **Invoice** screen there is a small **Progress** table. The last action on the order is indicated here.

Progress		
Date		Action
27/04/2003		I

The goods were booked **In** on 27 April 2003

The full progress table can be seen more clearly by clicking on the Progress option above the icons. This will show all actions carried out, and who carried them out.

Orthotic Patient Administration System					
File Data					
Order	Date	A	Action:	GRN	Reason
G2342342	06/06/2001	S	upplied		
G2342342	01/06/2001	I	n		
G2342342	21/05/2001	R	eturned		Adjustment to left raise
G2342342	15/05/2001	I	n		

Information recorded includes:

Ordered	Date order raised on OPAS
In	Date goods received. Includes delivery note number if given
Returned	Date goods returned. Includes goods return number and reason if given
Supplied	Date goods supplied to patient
Hold	Date order put on hold. Includes reason if given
Cancelled	Date order cancelled. Includes reason if given
Un-cancelled	Date order un-cancelled. Includes reason if given

If you want to see the progress information for all orders, rather than for a specific order, this can be done by going into **History – Progress**.

Utilities

1. **Choices – Introduction**
2. **Choices – Clinician**
3. **Choices – Defaults**
4. **Choices – Directorates**
5. **Choices – GPs**
6. **Choices – History**
7. **Choices – Letters**
8. **Choices – Medical Conditions**
9. **Choices – Note Categories**
10. **Choices – Orthosis Codes**
11. **Choices – Patients**
12. **Choices – Purchasers**
13. **Choices – Referrer Types**
14. **Choices – Referrers**
15. **Choices – System**
16. **Choices – Wards**

- 17. File Fix**
- 18. Messages**
- 19. NSI**
- 20. OPrice**
- 21. Order Numbers**
- 22. Password**
- 23. Training**
- 24. Upgrade**
- 25. Users**
- 26. Version**
- 27. Who**

1. Choices – Introduction

Menu: **Utilities – Choices**

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

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

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

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

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


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

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

2. Choices – Clinicians


Menu: Utilities – Choices – Clinicians

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


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

<i>Reference</i>	is entered automatically by the system and cannot be changed
<i>Name</i>	enter the clinician's name
<i>Expertise</i>	move the highlight using the space bar until the correct expertise is selected
<i>Source</i>	enter whether the Clinician is in-house or which contractor they are from
<i>Fee</i>	if there is a set fee for the Clinician, this can be entered here

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

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

Click on the clinicians name (that you wish to change) so that they are highlighted,

then click on the 'swap' icon  (Edit, Swap).

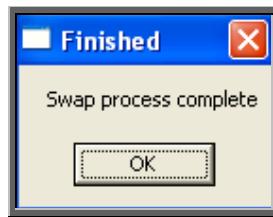
At the bottom of the screen you will be asked for the new reference number.



32 | | |
New reference:
Changing Orthotist Reference 8

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

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



Click on OK to continue.

3. Choices – Defaults

Menu: **Utilities – Choices – Defaults**


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


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

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

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

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

You may find it useful to click on the 'sort' icon  (**S**ort) and select **S**creen and then

Whole **F**ile. It is also easier when it appear as a list so click on the 'browse' icon  (**D**ata, **B**rowse).

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

<i>Number</i>	Reference number
<i>Screen</i>	The screen the field appears in
<i>Field</i>	The field name

- Pop-up* This informs you if there is a pop-up available for this field
- Default* This is the part that you can change to control what happens when you get to the specified field.
- If the word POP is entered in the *Default* field the pop-up will automatically appear
 - If the *Default* field is left blank then the pop-up will not automatically appear, and you will need to press the Tab key to see the pop-up list.
 - If you wish information to automatically appear in the field this needs to be entered in the *Default* field.
 - i) if the field does not have a pop-up (i.e. notes:) then enter the word you wish to appear automatically i.e. Assess.
 - ii) if the field does have a pop-up available (i.e. Supplier) then enter the reference number you wish to default to. e.g. if you only use one supplier then enter the supplier code in the *Default* field.

To amend the information in the *Default* field click on the ‘update’



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


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

4. Choices – Directorates

Menu: Utilities – Choices – Directorates



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

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

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


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

5. Choices – GPs

1. GPs

Menu: **Utilities – Choices – GPs – GPs**

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

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

<i>Count</i>	is automatically entered by the system and cannot be changed
<i>Reference</i>	is the GPs FHSA reference


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

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

2. PCTs

Menu: Utilities – Choices – GPs – PCTs


This holds details of the Primary Care Trusts.

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

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

3. Practices

Menu: Utilities – Choices – GPs – Practices


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

4. Local

Menu: Utilities – Choices – GPs – Local

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

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

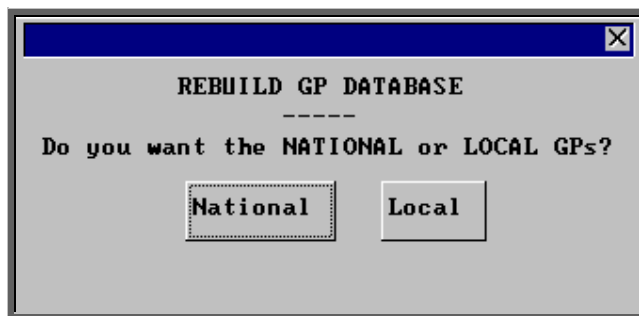
Add a new PCT to you local list by clicking on the 'enter' icon  (Edit, Enter), and select the supplier from the pop-up list.

To activate your local list see the note below.

5. Rebuild

Menu: **Utilities – Choices – GPs – Rebuild**

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



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


Press **Esc** if you want to abandon the option.


6. History

1. Descriptions

Menu: **Utilities – Choices – History – Descriptions**

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

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

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

2. Discounts

Menu: **Utilities – Choices – History – Discounts**

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

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

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

Select the supplier name from the list offered.

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

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

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

Bands « ↔ »		
From	To	Disc
A	Az	5.00%

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

3. E-mails

Menu: **Utilities – Choices – History – E-mails**

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

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

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


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

4. Fax

Menu: **Utilities – Choices – History – Fax**

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

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

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


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


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

5. Fitting

Menu: **Utilities – Choices – History – Fitting**

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

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

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

Itemcode is the item code (schedule number) as in the Prices list. Press **Tab** key for a list of items

Selling is the price at which you will sell this item on


Fitting is any additional fitting charge for this item (could be used without a selling price for a fitting charge on its own)

Description is your description of the item that is being sold

6. GRN Reasons

Menu: Utilities – Choices – History – GRN Reasons

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

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


7. Items


Menu: Utilities – Choices – History – Items


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


Do not update these records because any changes will be lost when the prices are rebuilt. New items should be added in Utilities – NSI – Items (see Utilities - Note 19. NSI).

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

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

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


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

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

8. Manufacture

Menu: **Utilities – Choices – History – Manufacture**

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

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

9. Prices


Menu: **Utilities – Choices – History – Prices**

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

It will also show the discounted price for that item if a discount has been applied in **Utilities – Choices – Discounts** (see [Utilities - Note 6. Choices - History - Discounts](#))

Do not update these records because any changes will be lost when the prices are rebuilt. New prices should be added in **Utilities – NSI – Prices** (see **Utilities - Note 19. NSI**).

Using the Shopping Basket

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

Items select the first item you wish to find the price for from the pop-up list. Once selected, it will appear in the *Items* table.

Continue to pick items from the pop-up list until all the items you want have been selected.

Once all the items have been chosen, press **Esc** to make the pop-up list disappear and then press **Enter** to move into the *Suppliers* table

Suppliers select the first supplier you wish to find the price for from the pop-up list. Once selected, it will appear in the *Suppliers* table.

Continue to pick suppliers from the pop-up list until all the suppliers you want have been selected.

Once all the suppliers have been chosen, press **Esc** to make the pop-up list disappear and then press **Enter** to start the search.



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

Screen

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

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

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

Printer

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

Shopping Basket of 2 items, printed 03/11/2003					
Supplier 1: Halo Healthcare Ltd (2 items)			Supplier 2: Peacocks Medical Group Ltd		
Supplier 3: Remploy Healthcare (2 items)			Supplier 4: Jane Saunders & Manning Ltd		
Supplier 5: Blatchford Exolite Orthotic Services (2 items)					
Item	Supplier 1	Supplier 2	Supplier 3	Supplier 4	Supplier 5
B11 - Addition of a cuff to increase the upper height in a single	21.90	12.51	15.64	18.90	27.46
C11 - Restitching upper, per 25mm or part thereof	1.67	1.68	2.72	2.16	2.56
Grand Total	23.57	14.19	18.36	21.06	30.02

File

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

10. Suppliers


Menu: **Utilities – Choices – History – Suppliers**


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


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

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



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

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

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

7. Choices – Letters



Menu: Utilities – Choices –Letters

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

Ad hoc Letters	ADHOCA to ADHOCZ 26 standard letters used to create one off letters using the Letters category in medical notes.
Collection Letters	COLLECTA to COLLECTZ 26 standard letters which can be sent to patients to inform them that their items are ready for collection.
Condition Letters	CONDITA to CONDITZ 26 standard letters that can be sent to patients from the medical conditions screen. These are specifically for targeting those patients with a particular medical condition.
DNA Letters	DNA_CONA to DNA_CONZ 26 standard letters to inform Referrers of patient DNA's (Did not attends) DNA_GPA to DNA_GPZ 26 standard letters to inform GPs of patient DNA's

	DNA_PATA to DNA_PATZ 26 standard letters to patients that have DNA'd
Enquiry Letters	ENQUIRYA to ENQUIRYZ 26 standard letters that can be sent to private patients that are making an initial enquiry regarding treatment
GP Letters	GPLETA to GPLETZ You can create 26 standard letters to send to GPs
HSA5	Template for National Health Service Form HSA5 (Supply of Drugs and Elastic Hosiery)
Appointment Letters	LETTERA to LETTERZ 26 standard letters that can be sent to patients to advise them of their appointment.
Loan Letters	LOANREMA to LOANREMZ 26 standard letters that can be sent to remind patients to return items on loan
Order Letters	ORDLETA to ORDLETZ 26 standard letters that can be sent to patients about their order.
Patient Letters	PATLETA to PATLETZ 26 standard letters that can be sent to patients.
PCG Letters	PCGLETA to PCGLETZ 26 standard letters that can be sent to PCGs.
Practice Letters	PRACLETA to PRACLETZ 26 standard letters that can be sent to GP Practices.
Reminder Letters	REMINDA to REMINDZ 26 standard letters that can be sent to patients to remind them about their appointment.
TRANS	Internal transport memo for booking patient transport for appointments.
UNCOLL	Collection reminder letter.
Waiting List letters	WAITLSTA to WAITLSTZ 26 standard letters that can be sent to patients on the waiting list
WF1	Template for National Health Service Form WF1 (Supply of Wigs and Fabric Supports)

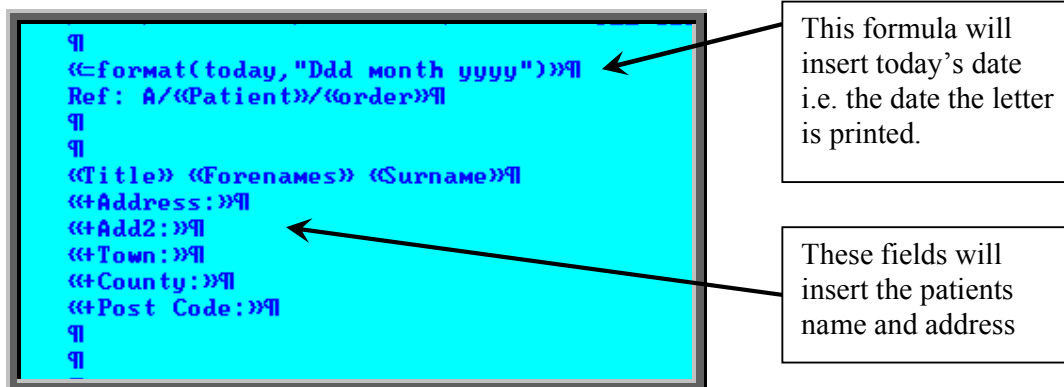
Editing Letters

Move the green highlight so that it is on the letter that you wish to edit. Once you have highlighted the relevant letter click on the 'paper and pencil' icon  (WP) to see the letter. Then click on the 'four coloured squares' icon  (Wordprocessor) to be able to edit the letter.

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

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

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



The screenshot shows a word processor window with a cyan background. The text inside is as follows:

```

«format(today,"Ddd month yyyy")»
Ref: A/«Patient»/«order»
«Title» «Forenames» «Surname»
«+Address:»
«+Add2:»
«+Town:»
«+County:»
«+Post Code:»

```

Two callout boxes are present:

- One pointing to the first line: "This formula will insert today's date i.e. the date the letter is printed."
- Another pointing to the address fields: "These fields will insert the patients name and address"

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

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

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

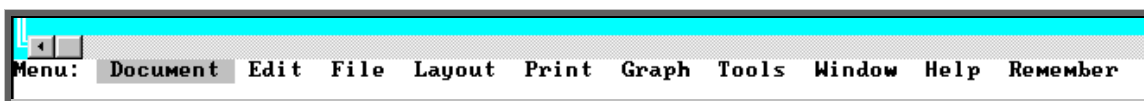
Bold is turned off by pressing **Ctrl-B** again.

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

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

Changing the properties of existing text

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



To make existing text **BOLD**:

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

To make existing text Underscored:

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


To change the font of existing text:


Move your cursor to the start of the text you wish to change
click on **Layout** (type L)
click on **Font** (type F)
click on **Change** (type C)


use the arrow keys to highlight the text you want to change and then press **Enter**

A list of fonts already used in the letter will appear. If the font you want to use is in the list, move the cursor so that it is pointing at the required font and press **Enter**. If you want to use a different font then press **F6** twice, move the cursor so that it is pointing at the required font and press **F10** twice.

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

‘print’ icon  (File, Print) and clicking on OK.

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


Exit), and then click on the ‘exit with a question mark’ icon  (Return).

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



8. Choices – Medical Conditions

Menu: Utilities – Choices – Medical Conditions

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

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


To find all the patients that have a particular medical condition assigned to them, move

through the medical conditions using the ‘arrow’ icons  and  (**F6** and **F5**) to

find the medical condition you wish to interrogate. Then click on the ‘patients’ icon 

(Patients) to see all those patients that have that medical condition. Now you can look at the information on the screen, print a list of those patients, or send a pre-designed letter to those patients.

Printing a list of patients


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

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

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

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

Sending letters to those patients

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

Select **Letter** from the print menu

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

Select the number of copies required


Highlight **Yes** to continue and press **Enter**

9. Choices – Note Categories

Menu: **Utilities – Choices – Note Categories**

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



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

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

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


10. Choices – Orthosis Codes

Menu: Utilities – Choices – Orthosis Codes

Orthosis Code is a financial costing analysis code for a group of similar items i.e. made to measure footwear. Each hospital can use these codes as best suits them, usually in conjunction with their financial department. They can be as simple or as detailed as you require, but bear in mind that every order that is added onto OPAS must have an orthosis code entered. If the coding structure is too complicated it may result in miscoding.

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



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

<i>Orthosis Code</i>	the orthosis code (up to 12 characters).
<i>Description</i>	is the description you want to give to that group of items represented by that code.
<i>Delivery</i>	is the normal delivery time for that group of items.
<i>Group</i>	you can group orthosis codes together. i.e. you may have an orthosis code for 'custom made shoes', one for 'stock shoes' and another for 'adaptions', but they all belong to a group called 'footwear'.
<i>Classes</i>	items and orthosis codes can be linked to a classification. <i>Classes</i> is working along the same principal as <i>Group</i> above, but takes it further by being able to link orthosis codes and items together. The purpose for this is to show if an orthosis

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

			Orthosis Code	Qty	Price
Footwear	Standard	Boot	ABC123	S 1	77.00
Footwear	Standard	Boot	ABC123	S 1	72.00

An orthosis code can be linked to several classes.

11. Choices – Patients

1. Counties

Menu: Utilities – Choices – Patients – Counties

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




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

2. DOR

Menu: Utilities – Choices – Patients – DOR

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

If you wish to update the description of the DOR's for your area, find the relevant

DOR and click on the 'update' icon  (Edit, Update). Move to the *Description* field. Press **F8** to remove the contents of the field and type in the correct *Description*.

3. Ethnicity


Menu: Utilities – Choices – Patients – Ethnicity

If it is required to classify patients by their ethnic origins click on the 'enter' icon



(Edit, Enter) and enter the codes and descriptions that will be used.


To update an existing Ethnic Origin, find the Ethnic Origin you wish to change and

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

4. Exempt

Menu: Utilities – Choices – Patients – Exempt

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

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

5. Interface


Menu: Utilities – Choices – Patients – Interface

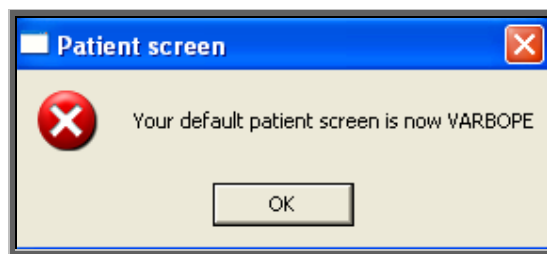
Screen	Case	Notes	Orders	Appoints	ArchAppt	Prescrip	Mobility
VERBOSE	UPPER	Yes	Yes	Yes	No	No	No
VERBOPE	UPPER	Yes	Yes	Yes	No	Yes	No
VERBOME	UPPER	Yes	Yes	Yes	No	Yes	Yes
VERBOWE	UPPER	Yes	Yes	Yes	No	No	Yes
VERPOSE	Proper	Yes	Yes	Yes	No	No	No
VERPOPE	Proper	Yes	Yes	Yes	No	Yes	No
VERPOME	Proper	Yes	Yes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

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

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

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

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




6. Services

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

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

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

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

<i>Service</i>	enter the service code
<i>Description</i>	enter the service description
<i>Elements</i>	enter the elements that make up the service

7. Titles

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

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


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

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

8. Towns

Menu: **Utilities – Choices – Patients – Towns**

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

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


12. Choices – Purchasers

Menu: **Utilities – Choices – Purchasers**

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

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

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

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

<i>Reference</i>	is entered automatically by the system and cannot be changed.
<i>Short name</i>	the first few letters or initials of the purchaser, to enable quick selection of that purchaser.
<i>Purchaser</i>	is the full name of the purchaser.
<i>Type</i>	enter I if the purchaser is internal, or E if the purchaser is external.
<i>Discount</i>	is entered if you give that purchaser an across-the-board discount.
<i>Sales VAT</i>	is entered as Y or N to indicate whether VAT is applied on invoices to this purchaser.
<i>Fitting</i>	is entered as Y or N to indicate whether a fitting charge is normally added to invoices to this purchaser. Such charges will come from the Fitting screen (see Utilities - Note 6. Choices - History - Fitting).
<i>Account Code</i>	is entered if you are producing a file containing invoice information to send to your Finance Department. It is the account code for your department that is used by the Finance Departments software.
<i>Card</i>	is entered as N if the purchaser is not using purchasing cards (this is the default) or entered as Y if they are.

<i>Print</i>	enter <input type="checkbox"/> if orders for this purchaser are to be instant printed. leave blank to batch print enter <input type="checkbox"/> to prevent orders printing in batch or instant print (if switched on).
<i>Copies</i>	If instant print of orders is switched on, extra copies (to those requested in the system parameter screen) can be printed for the purchaser.
<i>Invoices</i>	6 address lines, Phone and Fax are available for where invoices are to be sent for the purchaser.
<i>Deliveries</i>	6 address lines, Phone and Fax are available for where goods are to be delivered for the purchaser.


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

13. Choices – Referrer Types

Menu: Utilities – Choices – Referrer Types

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


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

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

<i>Code</i>	enter an appropriate code
<i>Description</i>	enter a description for the referral type

14. Choices – Referrers

Menu: Utilities – Choices – Referrers

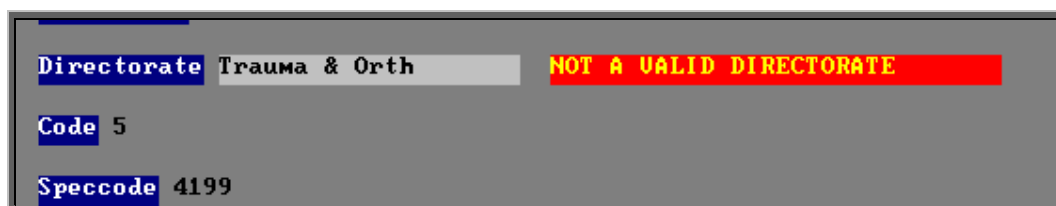
To add a new referrer click on the 'enter' icon  (Edit, Enter)

Reference is entered automatically by the system and cannot be changed

Referrer must be entered with the surname last e.g. **Mr A Wilson** rather than **Wilson A**, in order that the names sort correctly into alphabetical order. If the Referrer has more than one initial, ensure there is a space between them e.g. **Mr A D Wilson**

Directorate enter the directorate the referrer works for from the pop-up list (Directorates to appear in the pop-up should be set up in **Utilities – Choices – Directorates**). If a Referrer works for more than one directorate, you may want to enter a new referrer record for each of the directorates so management reports show spend accurately.

Note: If you choose to type the directorate in manually (rather than selecting one from the pop-up list) and it does not match a directorate in your list the following message will appear on the screen.



Directorate	Trauma & Orth	NOT A VALID DIRECTORATE
Code	5	
Speccode	4199	

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

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

Speccode is a financial code for that speciality (directorate), used for financial analysis. If you have assigned a speciality code against

the directorate chosen above (in **Utilities – Choices – Directorates**) then the speciality code will appear automatically.

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

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

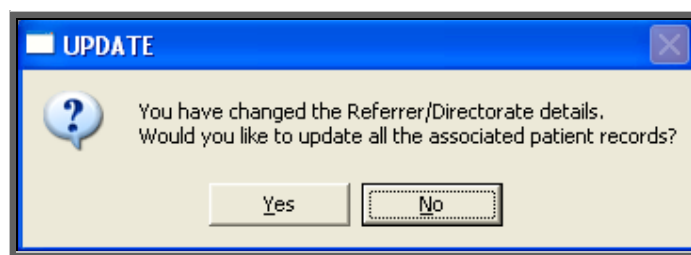
Card if the referrer has a purchasing card, enter the card details here. If you have assigned a purchasing card against the directorate chosen above (in **Utilities – Choices – Directorates**) then the card details will appear automatically.

Updating Referrer details

To update an existing referrer, find the referrer you wish to change and click on the

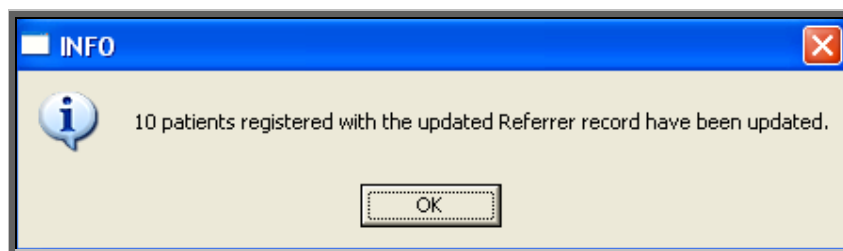
‘update’ icon  (Edit, Update).

When you update referrer details you will be asked if you would like to update the patient records, which have that referrer assigned to them.



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

If you choose **Yes**, the patient records will be updated and you will be informed when it is complete with the following message.




This task may take several minutes (depending how many patients you have) but will take less time if you are the only one logged into OPAS.

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

15. Choices – System

Menu: **Utilities – Choices – System**

This screen holds system variables, which should not need changing once they have been set up. This screen is very long and you may need to click on the ‘page down’ icon  (**PgDn**) to see all the options.

<i>VAT Rate</i>	will need to be changed if the VAT rate changes: it should not be changed in advance, only on the day that the rate actually changes
<i>Hospital Name</i>	would only be changed if the name of the Trust changed
<i>Stock Supplier (1)</i>	the supplier number for stock supplier 1 is 888
<i>Stock Supplier (2)</i>	the supplier number for the second stock location (usually 777)
<i>Stock Supplier (3)</i>	the supplier number for the third stock location (usually 666)
<i>Stock Supplier (4)</i>	the supplier number for the fourth stock location (usually 555)
<i>Stock Supplier (5)</i>	the supplier number for the fifth stock location (usually 444)
<i>Last Home Purchaser</i>	purchasers should be entered into the system with internal purchasers first. If there is more than one internal purchaser, this number is the number of the last

internal purchaser: e.g. if there are 3 internal purchasers (entered first into the purchasers list) followed by 5 external purchasers (entered after the internal ones), then **3** would be entered here. Alternatively, when the purchasers are created, indicate on each one whether it is an internal or external purchaser.

Use Large Icons

is set to **Yes** to show large icons. If you prefer small icons, change this to **No**

Monitor messages

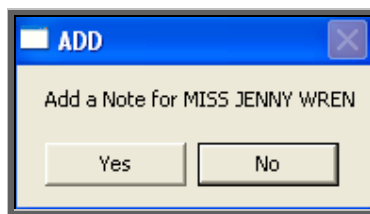
if this is set to **Yes**, you will be prompted when you have new messages ([see Utilities - Note 18. Messages](#))

'Windows' messages

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

Default

this allows you to set what option appears as the default for Yes-No and OK-Cancel prompts.



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

Dormant time

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

Auto-update DOR

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

Printing

General Printer

is the printer used for letters and reports. To change this, set the required printer as the default in Windows,

then in this screen move the cursor down to this line and press **Tab**

Order Printer

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

FAX Printer

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

Instant Invoice

if this is set to anything other than 0, an invoice will print immediately after having been entered onto the system if the purchaser on the invoice is external. Enter the number of invoices that you wish to be printed instantly.

GRN

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

Orders

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

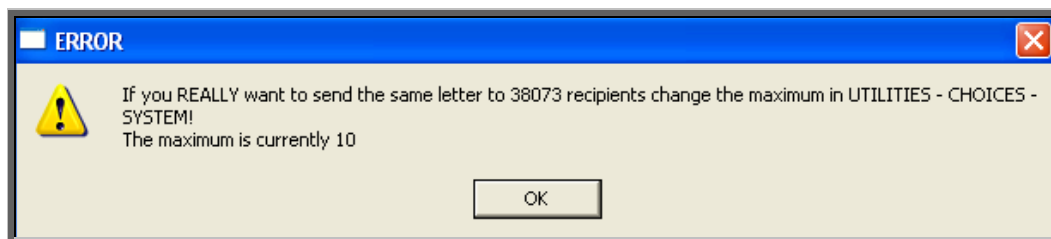
Select Purchaser

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

Stock Orders

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

<i>Instant Appt Letters</i>	if you wish to instant print appointment letters, select Yes
<i>Collection Letters</i>	if you wish to instant print collection letters, select Yes
<i>Transport Memos</i>	if you wish to instant print transport memos, select Yes
<i>Waiting List Letters</i>	if you wish to instant print waiting list letters, select Yes
<i>Max mail merges</i>	to set the number of maximum letters that can be produced (excludes Appointment and Collection letters). This is to prevent, for example, a HSA5 form being produced for all your patients. If you try and produce letters for more than your maximum, the following message will appear:



Paths

<i>'Launch' with: Still:</i>	type in the path of the executable file of the software on your PC that is used to display pictures/photographs. If you do not know this, your IT department should be able to help you.
<i>'Launch' with: Video:</i>	type in the path of the executable file of the software on your PC that is used to display video pictures. If you do not know this, your IT department should be able to help you.
<i>'Launch' with: Scanned:</i>	type in the path of the executable file of the software on your PC that is used to display scanned image. If you do not know this, your IT department should be able to help you.
<i>'Launch' with: Documents:</i>	type in the path of the executable file of the software on your PC that is used to display documents (e.g. MS Word). If you do not know this, your IT department should be able to help you.
<i>PAS link path</i>	enter the path to the PASlink, if installed

<i>Case conversion</i>	if using PASlink, the data can be converted into UPPER or Proper case
<i>Upgrade path</i>	the path to the files provided by Wynnldodge Ltd for upgrades to the OPAS System. This is normally left blank to indicate A: (the floppy drive).
<i>Export path</i>	this is used by those exporting information from OPAS into the main hospital system
<i>Include fieldnames</i>	this is used by those exporting information from OPAS into the main hospital system
<i>RTT actions export</i>	this is used to say when RTT information from OPAS into the main hospital system is exported
<i>RTT path</i>	this is used by those exporting RTT information from OPAS into the main hospital system

Appointments

<i>Appointment time</i>	is the default length of time in minutes for an appointment: it should show the most common length of appointments.
<i>Clinic Usage</i>	you can set how full a clinic can be booked with automatic appointments by reducing the percentage figure. However, making use of the facility by setting the usage to less than 99% will slow down the speed taken for OPAS to find the next available appointment for you.
<i>Automatic Delay</i>	enter the number of days delay in searching for appointments from the order and waiting list
<i>Earliest/latest times the with transport</i>	enter the earliest and latest times for the morning and afternoon that appointments that require transport can be offered.
<i>Cancelled Appoints</i>	once appointments are cancelled, this option decides whether they are kept on the system and identified by being highlighted in red, or removed (K for keep for R for remove).
<i>No of Transport Memos</i>	enter the number of copies of transport memos required

<i>Collections printed on Clinic Lists?</i>	when printing clinic lists, set collections to print or not automatically, or to be asked each time if they are required
<i>Demographics also?</i>	when printing clinic lists, to set whether to be given option to print patient demographics
<i>Remove from Waiting List when Appoint is:</i>	select whether patients are removed from the waiting list when appointments are Made or Attended .
<i>Remove on DNA:</i>	when marking a waiting list appointment as DNA, select whether patient should be removed or not automatically or asked each time.
<i>Maximum DNAs</i>	this controls the generating of automatic letters for patients who DNA e.g. 1 in 6 months would result in a letter being sent if the same patient DNA'd twice in a 6 month period.
<i>Appointment Outcome: DNA:</i>	enter the reference for your DNA outcome. This is so OPAS will ask if you wish to make a new appointment when you record that a person Did Not Attend their appointment.
<i>Appointment Outcome: CNA:</i>	enter the reference for your CNA outcome. This is so OPAS will ask if you wish to make a new appointment when you record that a person Could Not Attend their appointment.
<i>Appointment Outcome: CBH:</i>	enter the reference for your CBH outcome. This is so that when an appointment is cancelled by the hospital the correct outcome is inserted
<i>Max Appointments</i>	enter the maximum number of appointments per session for New , Supply , Fit , Review and Cast appointments. Leave these blank for unlimited number of appointments.
<i>Event for Fittings</i>	select the event that will be entered on appointments made from the order

History

<i>Update after Pass</i>	if this is set to No , you will not be able to edit orders or invoices once the invoice has been passed to finance for payment.
<i>Process invoices for</i>	if this is set to Yes , the invoice can not be amended for

<i>received/supplied either goods only</i>	adding invoice details unless the goods have been received or supplied
<i>Pass for payment</i>	this controls the number of copies of the report that is produced when Pass for payment is run from the invoice screen. Enter 0 here to stop the report from printing.
<i>Record delivery notes</i>	if this is set to Yes , when goods are booked in on the patient and stock order, you will be prompted to enter the delivery note number.
<i>Manufacture</i>	to be set as None , Local or Remote . This field is used to indicate if orthotic items are manufactured by the Hospital. If they are not this should be set to None . If they are, you should set this to Local if the manufacturing takes place on site, or Remote if at another location.
<i>E-mail orders</i>	if you wish to e-mail orders enter c:\daemon\ in this field.

Finance

<i>Sage version</i>	if you are exporting invoice details to Sage software, enter the version of Sage used
<i>Purchaser Code (HA)</i>	select your Health Authority. Press Tab to choose from the pop-up list
<i>Centre Code (DSC)</i>	select your Disablement Service Centre. Press Tab to choose from the pop-up list

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

You are then asked:




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

16. Choices – Wards

Menu: **Utilities – Choices – Wards**

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

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

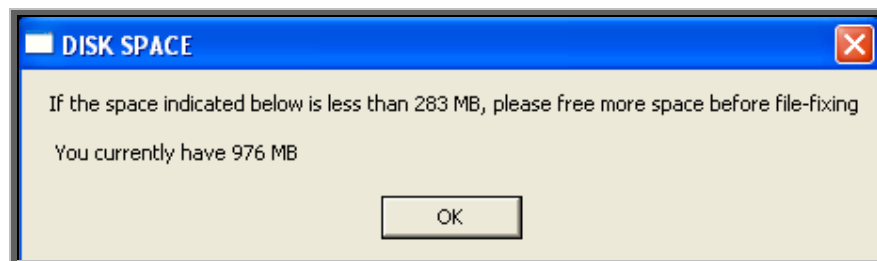
17. File Fix

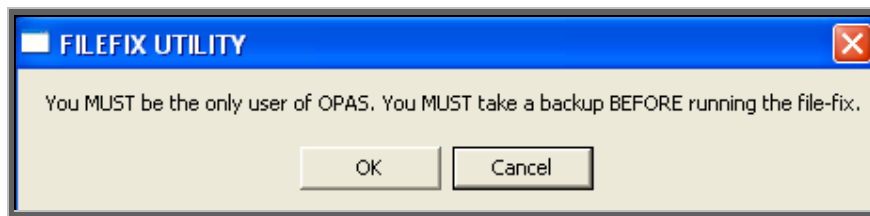
There are occasions (particularly following a power failure) that we will ask you to run a **File Fix**. This will check the main database files to ensure that there are not any problems and if there are it will attempt to fix the relevant files. This option will take approximately 30 minutes to run.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

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

Menu: **Utilities – File Fix**

OPAS will check that you have enough space on your local drive to perform the File Fix. The following message will appear, and you must ensure that there is enough space before continuing with the File Fix

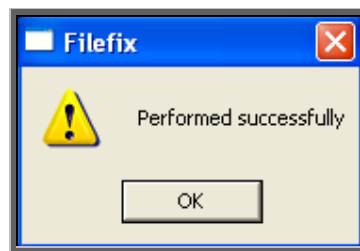




If you are not the only person logged onto OPAS or backup has not been taken recently select **Cancel**. Otherwise select **OK** to continue.

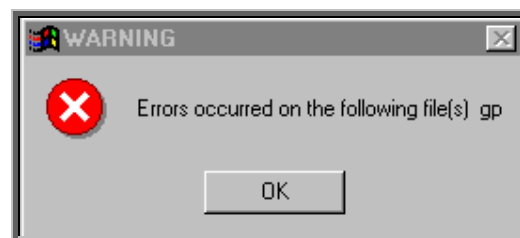
In the bottom left corner of the screen it will indicate which file it is checking.

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



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

If any other message than the one above appears, e.g.



write down exactly what it says and contact the Support Helpdesk on 01904 492425. **DO NOT** use OPAS or let anyone else log on without speaking to someone on the Helpdesk.

18. Messages

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

a) Switching messaging on

Menu: **Utilities – Choices – System**

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

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

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

×

Recalculate SYSDEF.UW each start up session?

NoYes

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

MESSAGES

×


 You have received new mail.

OK

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

b) Sending messages from the outbox

Menu: **Utilities – Messages – Outbox**.

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

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

Re: enter a title if applicable

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

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

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

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


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

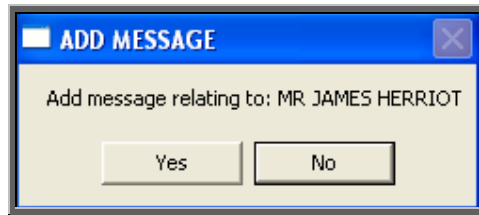
Message: enter your message here. There are nine lines available for your message.

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

c) Sending messages from the Patients screen

Menu: **Patients**

Click on the 'messages' icon  (Message).



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

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

Re: enter a title if applicable

Patient: patient details will have been entered for you

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

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

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

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

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

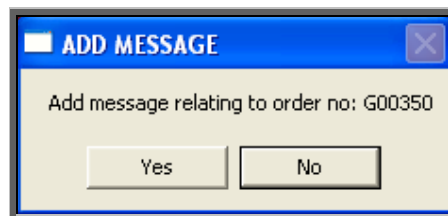
Having completed your message press **Ctrl-Enter** to send.

d) Sending messages from the Order screen

Menu: History – Orders



Click on the 'messages' icon (Message).



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

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

Re: enter a title if applicable

Patient: patient details will have been entered for you

Order: order details will have been entered for you

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

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

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


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

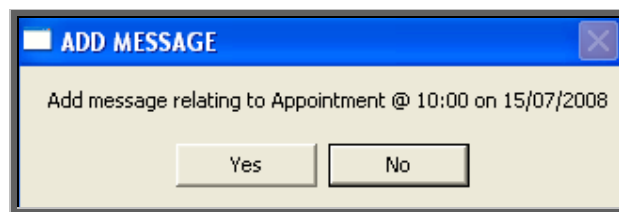
Having completed your message press **Ctrl-Enter** to send.

e) Sending messages from the Appointment screen

Menu: **Appointments – Current – Appointments**

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

Click on the ‘messages’ icon  (**M**essage).



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

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

Re: enter a title if applicable

Patient: patient details will have been entered for you

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

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

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

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


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

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

f) Sending messages from the Care Episode screen

Menu: History – Care Episodes

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

Click on the ‘messages’ icon  (Message).



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

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

Re: enter a title if applicable

Patient: patient details will have been entered for you

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

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

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







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

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

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

g) Reading messages

Menu: Utilities – Messages – Inbox.


- If patient details have been completed, you can jump to the patient's record by clicking on the 'patient' icon  (Goto, Patient).
- If order details have been completed, you can jump to the order by clicking on the 'order' icon  (Goto, Order).
- If appointment details have been completed, you can jump to the appointment by clicking on the 'appointment' icon  (Goto, Appointment).
- If care episode details have been completed, you can jump to the care episode by clicking on the 'care episode' icon  (Goto, Care).
- If you wish to reply to the message, click on the 'enter' icon  (Reply).
- If you wish to remove the message from your inbox, click on the 'delete' icon  (Clear). This will also delete the message from the senders outbox.

19. NSI (Non Scheduled Items)

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

Menu: **Utilities – NSI – Items**

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

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



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


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



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




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

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

Menu: **Utilities – NSI – Suppliers**

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

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

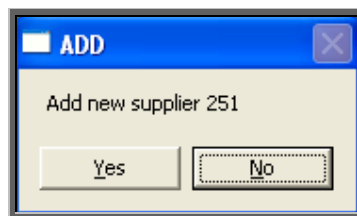


At the bottom left corner of the screen you will be asked for the new supplier code.

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



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




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

Name enter the full company name of the supplier

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

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


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

the 'update' icon  (Edit, Update).

Menu: Utilities – NSI – Prices

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

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

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

<i>Supplier</i>	select the supplier from the pop-up list
-----------------	--

<i>Item</i>	select the item from the pop-up list.
-------------	---------------------------------------

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



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

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

Search the *Search* field will automatically be populated

VAT Rate enter the default VAT rate for the item

S standard
E exempt
Z zero-rated
R reclaim

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


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

20. OPrice

OPrice contains the pricing information that has been contracted by Purchasing and Supplies Agency (PASA). This is updated on an annual basis. When new prices are agreed with PASA they kindly pass the details on to us so that we can convert them into a format that can be read into OPAS so that you have access to them when raising orders. As this is their data, you do not have the ability to edit this information. Having said that, there is the option to edit a suppliers details as they could move address within the contract year. If you need to add additional items, prices or suppliers, this should be done in the NSI (Non Scheduled Item) area ([see Utilities - Note 19. NSI](#)).

Menu: Utilities – OPrice – Current

Items Shows all the items and their descriptions for the current contract year as defined by PASA/Scottish Healthcare. This is for information only, and cannot be amended.

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

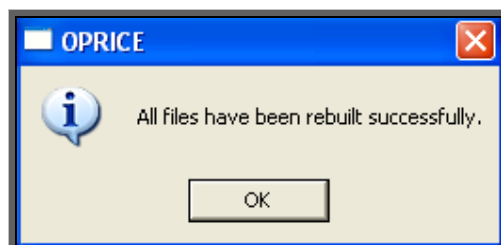
Menu: Utilities – OPrice – Previous

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

Menu: Utilities – OPrice – Rebuild

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

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



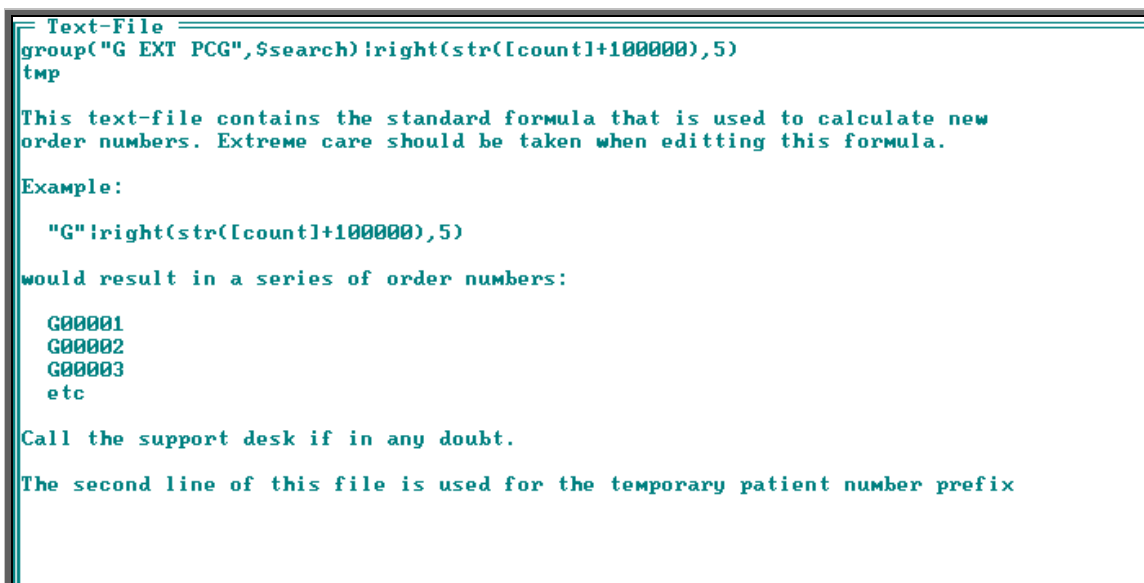
21. Order numbers

1. Standard Formula

Menu: Utilities – Order Numbers – Standard Formula

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

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



```
Text-File
group("G EXT PCG",$search) |right(str([count]+100000),5)
tmp

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

Example:

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

would result in a series of order numbers:

G00001
G00002
G00003
etc

Call the support desk if in any doubt.

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

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

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

2. Portable Formula

Menu: Utilities – Order Numbers – Portable Formula

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

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

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

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

Example:

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

would result in a series of order numbers:

G00001
G00002
G00003
etc

Call the support desk if in any doubt.

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

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

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

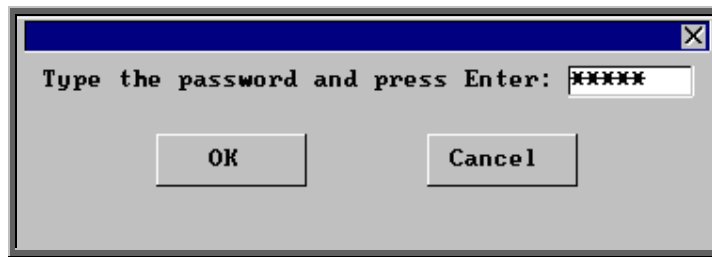
22. Password

1. Standard

Menu: Utilities – Password – Standard

Use this screen to change your log in password.

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



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



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

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



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

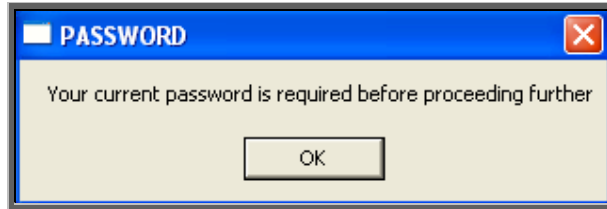


Click on OK to remove the message and then press the up arrow key on your keyboard to place your cursor back in the box where you need to type in the new password again. You are given three attempts to re-type the new password before being taken back to the menu, where you can start again from scratch.

2. Verification

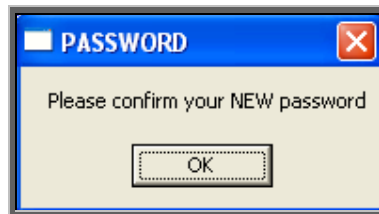
Menu: Utilities – Password – Verification

Use this screen to change your verification password (used for verifying notes).



If you do not have a verification password (or if you have forgotten it and the OPAS administrator has reset it) type in your log-in password.

Then you will be asked to type in your new verification password.



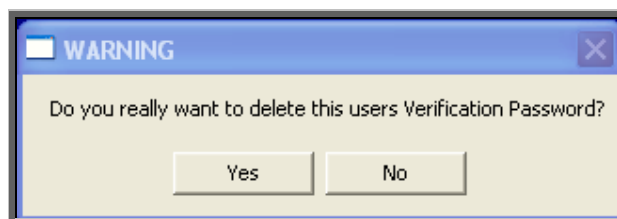
You will be asked to type your new verification password again, before confirming that your password has been stored.

Resetting a verification password

No one has the ability to look up a verification password (not even Linda or Martin at Wynn Lodge). If somebody forgets their verification password, then a user with administrator access has to reset it so they can go through the steps above again. To reset verification passwords go into **Utilities – Users**. Once you are looking at the relevant user record, click on the



'cancel verification' icon (File, Clean_Up, Verification).



Click on Yes to continue.

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



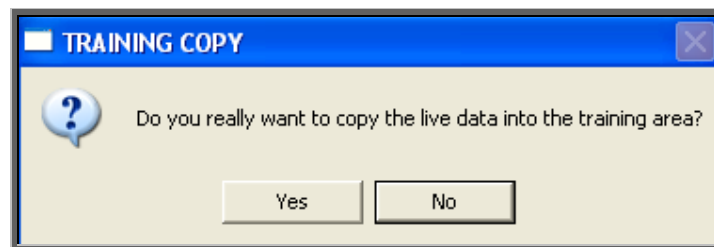
23. Training

1. Copy

Menu: **Utilities – Training – Copy**

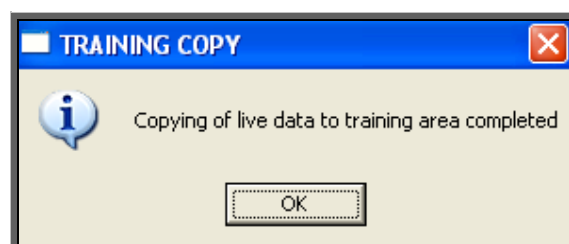
This option will transfer the data held in your live system into the training database. This makes the training area look more ‘life like’ and provides plenty of data to practice with.

On selecting this option you will be asked to confirm whether you wish to continue.



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

It will take a few minutes to copy the data, and you will know when it has finished as the following message will appear.

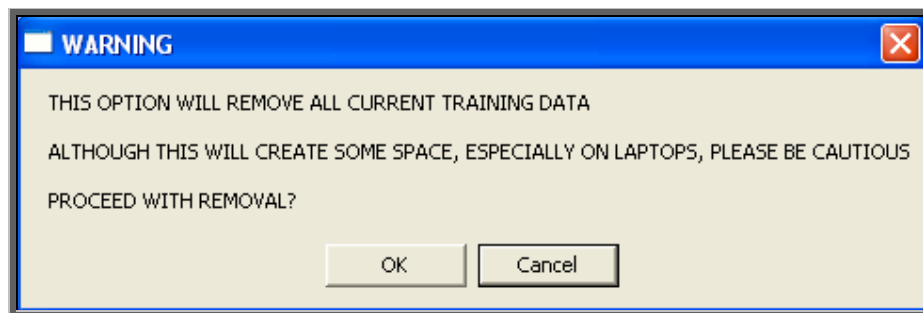


To log onto the training database, click on the OPAS icon as usual, but instead of logging on as yourself, log on with the User ID of **Trainee**. You will be taken into a training session of OPAS, which is completely separate to your live system. It is the ideal place to practice in as you can do anything you like without affecting your live data.

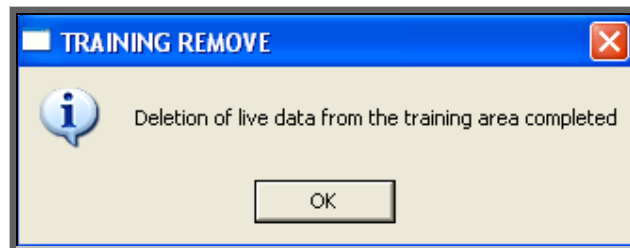
2. Remove

Menu: **Utilities – Training – Remove**

Selecting this option will remove the training database. You may want to do this if you no longer use the training database and want to free some space on your computer



If you are in any doubt, please contact the OPAS Helpdesk before proceeding.



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

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

24. Upgrade

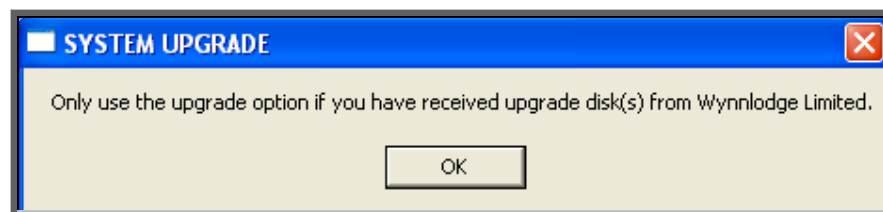
Menu: Utilities – Upgrade

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

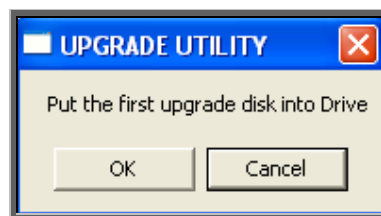
We periodically send you upgrade disks to update

- prices
- report layouts
- letter layouts

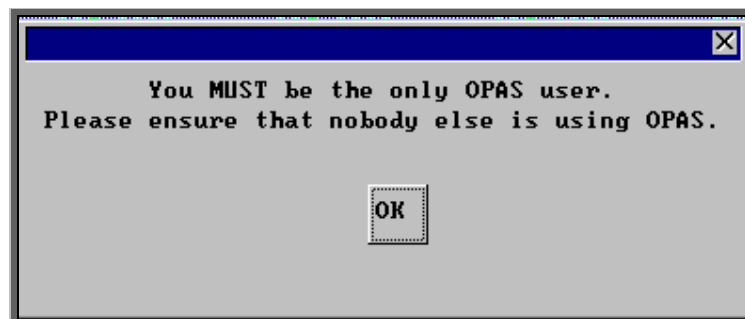
When you receive an upgrade disk to update reports or letters, make sure you are the only person logged onto OPAS before selecting this option (if you are not sure, click on **Utilities – Who** to find out who is logged on).



Click on OK



Put the disk into you PC, and click on OK



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

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

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

25. Users

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

A screenshot of a blue rectangular banner with a black border. The text inside the banner is white and reads: "Orthotic Patient Administration System - Logged in as LINDA at 21:55 on 02/11/2003".

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

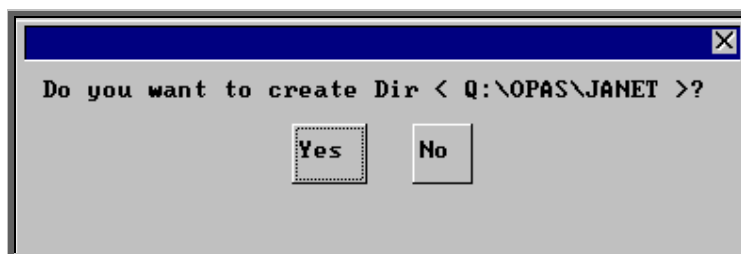
When OPAS is first installed, we will set up those users who will initially need to use OPAS. However, as new members of staff are taken on, they will be required to be set up here.

Menu: **Utilities – Users**

To add a new user, click on Edit and then select Enter.

<i>User ID</i>	enter the forename of the user e.g. Janet. There must be no spaces in the user name and it must be unique. Therefore if you have two Janets using OPAS one will have to be set up as their forename and initial of their surname e.g. Janetp or perhaps an abbreviation of their name e.g. Jan
<i>Password</i>	the password will be entered for you. It will be the same as the user id and in CAPITALS
<i>User Name</i>	enter the full name of the user e.g. Janet Air.

<i>Default appointment letter</i>	enter the standard appointment letter used – this is usually A.
<i>Print</i>	this field is used when OPAS is being used in more than one location. You can enter the appointment/collection letters used by that user so that when they use the Auto-print function for printing appointment/collection letters only their letter types will be printed.
<i>Assigned User Mode</i>	enter USER if the new user is to only have access to the screens used for day-to-day clerical procedures. enter ADMIN if the new user is to have access to all areas of OPAS, including those screens controlling the system set-up and maintenance functions.
<i>Information Set</i>	press the Tab key and select standard from the pop-up list.
<i>Language</i>	leave this field blank
<i>Autohelp</i>	select Yes
<i>Application Help</i>	select Read_only
<i>Technical Reference</i>	select Read_only
<i>Procedures</i>	select Read_only
<i>Definitions</i>	select Read_only if they have been set up as USER above. select Author if they have been set up as ADMIN above.
<i>Administrator</i>	select No
<i>Language Maintenance</i>	select No
<i>Personal Directory</i>	when reports are run in OPAS and the results are saved to file, they will be automatically saved in the default directory entered here. Therefore this line should read Q:\OPAS\user name) e.g. Q:\OPAS\JANET. Press Enter .



You will be asked if you want to create the new directory and you should click on **Yes** (type Y).

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

Resetting passwords

If someone forgets their password, then their password can be reset (back to their user name) by finding their user account in and selecting File, Clean_Up, Password from the top of the screen.





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

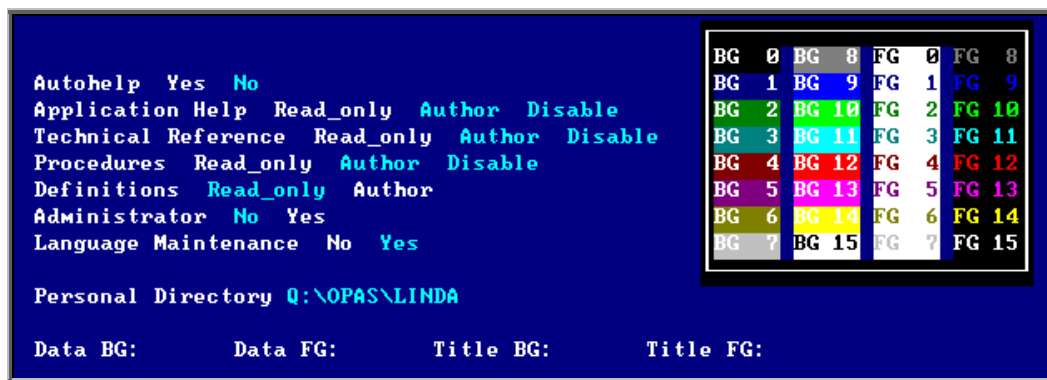
Choosing screen colours

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

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

To change screen colours firstly find the user that wishes to change their screen colours, by moving through the records with the 'right arrow' icon  (**F6** key).

Click on the 'update' icon  (Edit, Uppdate) and move down to the *Data BG*: field at the bottom of the screen.



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

Example 1



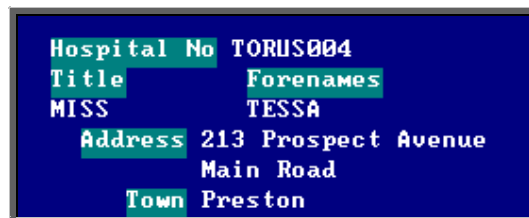
will give you



Example 2



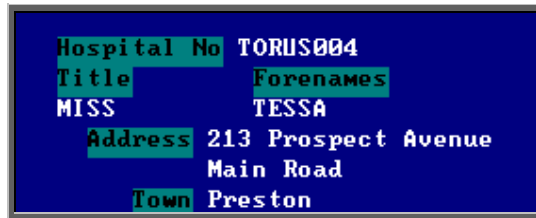
will give you



Example 3



will give you



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



26. Version

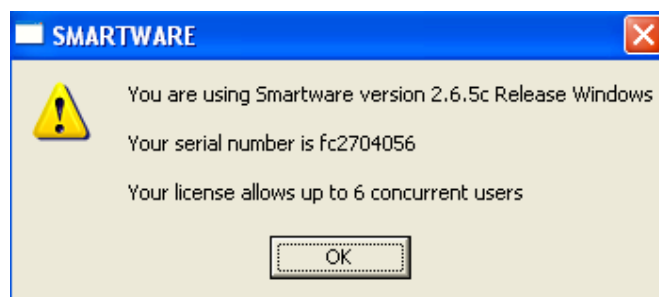
Menu: Utilities – Version

Filecheck

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

SmartWare

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

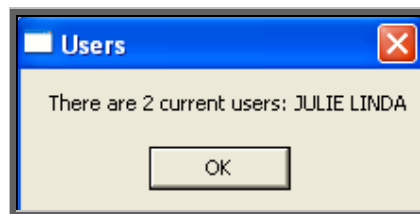


Version Number will show you which version of OPAS you are using and when it was installed. It will also give a brief summary of the changes made in that version.

27. Who

Menu: **Utilities – Who**

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



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