# Appointments

# 1.    Introduction

The Appointments module in OPAS will allow you to make, maintain and analyse your appointments. Appointments can be made manually or you can use OPAS to find the next available appointment for you. Either way, the information regarding the appointment is held on the Patients main record for easy reference. Making appointments on OPAS will also enable you to produce appointment and collection letters, clinic lists, DNA letters, transport memos and statistical data at the press of a button.

# 2.    Venues

Venues is the first screen that you must set up when starting to use the Appointments section of OPAS. It is not until the system knows where and when your clinics are held that it can create clinic dates for you to allocate appointments to.

A Venue should be created for each 'place' that clinics are held. You may need more than one venue if clinics are held away from the hospital, are held in more than one location of the hospital, or if you have more than one type of clinic i.e. an orthotic clinic and a wig clinic.

When appointment/collection letters are printed, they can include the address details of the Venue so that the patient knows where to go – so bear this in mind when deciding how to set up your Venues.

a)    Creating a new venue

   Menu:  Appointments – Venues

   Click on the 'enter' icon ![icon] (Edit, Enter) and enter details in the following fields.

   *Reference*        is assigned automatically and cannot be changed

   *Clinic*           enter four lines of address for the clinic. The first line should be unique and identify the clinic, since only that line shows in pop-up menus from which the clinic is selected

   *Phone:*           enter the clinic's phone number

   *Fax:*             enter the clinic's fax number

*Delivery Address*  six address lines are available if goods are to be delivered to an address other than the clinic address

*Service:*          a service can be assigned to a venue

*Directions:*      if required you can enter 100 characters for directions to the clinic, e.g. Follow signs for Outpatients A and take first door on the left

Although the field is 100 characters wide, only the first 62 characters are displayed on the screen.

Information entered here can be included on the appointment/collection letters.

*Collect:*         you can type up to 120 characters of instructions for collection, e.g. Monday to Friday, 10am – 3pm only.

Although the field is 120 characters wide, only the first 67 characters are displayed on the screen.

Information entered here can be included on the collection letters.

*Letter:*          select which collection letter is required for this venue (A-Z).

*Appoint:*      a default appointment letter can be assigned to a venue. If this is left blank, the users default letter will be selected when making appointments.

*Instant:*         enter Y if you wish to instant print appointment/collection letters for this venue.

Once this information has been added, we need to input details of the sessions that are held at the venue. To do this click, on Goto at the top of the screen and then select Sessions. If no sessions exist for the venue you will be asked if you wish to add a session now.
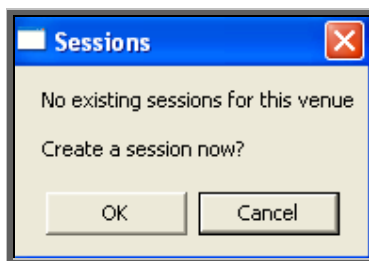


The screen below will appear for you to enter the session details.

| | |
|---|---|
| *Clinic* | this will be entered automatically for you |
| *Counter* | this will be entered automatically for you |
| *Clinician* | select the Clinician from the pop-up list. (Clinicians to appear in the pop-up should be set up in Utilities – Choices – Clinicians) |
| *Day* | select the day of the week from the pop-up list.  (Saturday and Sunday do not appear in the list.  If you need them to be, then they can be added in Utilities – Choices – Days) |
| *Freq* | select the frequency of that session from the following options: |

|  |  |
|---|---|
| Weekly | i.e. every Monday |
| Fortnightly | i.e. every other Monday |
| Tri-weekly | i.e. every third Monday |
| 1$^{st}$ day monthly | i.e. the first Monday of the month |
| 2$^{nd}$ day monthly | i.e. the second Monday of the month |
| 3$^{rd}$ day monthly | i.e. the third Monday of the month |
| 4$^{th}$ day monthly | i.e. the four Monday of the month |
| 5$^{th}$ day monthly | i.e. the fifth Monday of the month |

If you have a scenario that does not fit it any of these, then contact the OPAS Helpdesk for advice.

| | |
|---|---|
| *Start* | enter the time the clinic starts (in 24-hour notation, e.g. **0930**) |
| *Break From* | enter the start of the break if there is one, else press **Enter** to leave this blank.  This may not necessarily be a tea break, but perhaps a break in the clinic while the Clinician visits ward patients. |

If you have a clinic that runs all day you can either enter this as one session with a break for lunch, or as two separate sessions i.e. one for the morning and another for the afternoon. When you make an appointment from the patient screen, you will have the ability to search for a morning or afternoon appointment. This functionality will only work effectively, however, if you have set full day clinics as two separate sessions.

*Break To*          enter the end time of the break if required

*End*               enter the end time of the session (in 24-hour notation, e.g. **0930**)

Once you have completed all the fields, you will be asked if you wish to enter another session. Continue until all sessions have been entered and then press **Esc** to return to the Venue screen, where the information you have entered will appear in the Sessions table.

```
┌Sessions───────────────────────────────────────────────────────────────┐
│Clinician                Day F Start      Break From Break To  End      AP│
│Mr Orthotist             Tue W 09:30:00                        12:30:00  A │
│Mrs Orthotiste           Wed W 08:00:00  12:00:00   14:15:00   16:00:00  A │
│Ivor Ninkling            Thu 5 09:00:00                        12:30:00  A │
└───────────────────────────────────────────────────────────────────────┘
```

b)   Editing a venue

     Menu: Appointments – Venues

     Find the venue that you wish to change.

     If you wish to change information in the top part of the screen click on the 'update' icon [icon] (Edit, Update).

     All the fields can be edited except the *Reference* field. Move down the screen by pressing **Enter** until you reach the field you wish to change.

     If you wish to change information in the session table, click on Goto at the top of the screen and then select Sessions.

     To update the session, use the 'right arrow' icon [icon] (**F6**) find the session to be edited. Click on the 'update' icon [icon] (Edit, Update), and make the necessary changes.

To delete a session, use the 'right arrow' icon  (**F6**) find the session to be deleted.  Click on the 'delete' icon  (Edit, Delete).  To activate a deleted session, simply click on the 'delete' icon  (Edit, Delete) again.

Any changes made to the session information will not automatically change the details of clinic dates that have already been built.  This will need to be changed manually. (see Appointments – 4. Viewing/Amending clinic dates).  If there are a lot of sessions to be changed, contact the OPAS Helpdesk for advice.

# 3.     Creating clinic dates

Having told the system when your clinics are held, i.e. which day, what times etc, the next step is to create clinic dates built on that information so that appointments can then be allocated to them.

a)    Creating clinic dates for all sessions

Menu:  Appointments – Venues

Find the **Venue** that you wish to create clinic dates for.

Click on the 'clinician' icon  (Session).
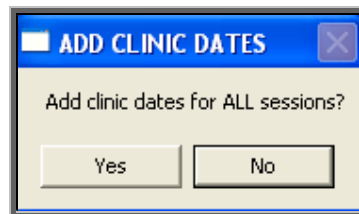


This prompt is asking if you wish to create clinic dates for all those clinics entered in the **Session** table for that Venue.

(If you do not want to create clinic dates for all sessions, click on **No** and follow the instruction in *b) Creating clinic dates for individual sessions*)

Click on Yes to continue.

A calendar will appear in the middle of the screen to select the date you would like to create clinic dates from.  It will default to today's date, but this can be changed to the date required.



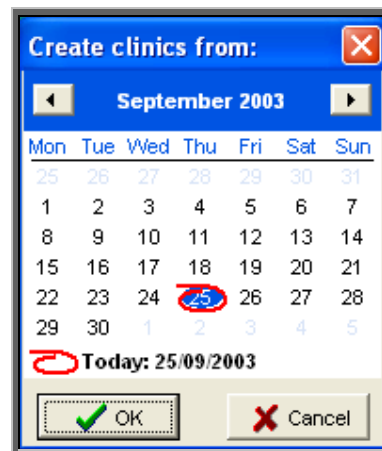You will then be asked when you would like to create clinic dates to.  We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS.  Making clinic dates 3 to 6 months into the future would be ideal.
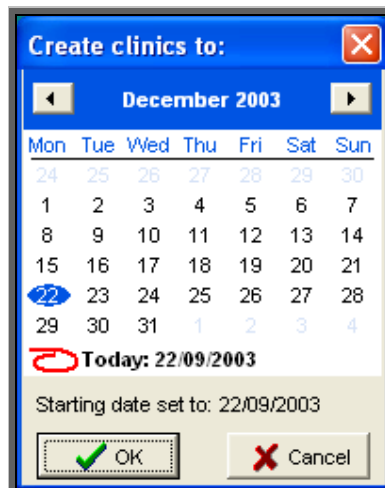


Having selected the 'to' date, press **Enter** (click on OK). OPAS will now create the clinic dates.

If the date range you have entered overlaps dates that have already been created, duplicate dates will not be made as OPAS will check that the clinic date is not already there before it creates a new one.

If you have any sessions that are fortnightly or tri-weekly you will be asked to specify the date of the first session.

Please select required start date for the fortnightly clinic
Mr Orthotist
Tue
09:00 - 12:00

30/09/2003        07/10/2003

Select the appropriate date and OPAS will continue to create clinic dates, and when it has finished you will be notified.

CREATE CLINIC DATES

Finished creating dates from 01/08/2008 to 31/10/2008

OK
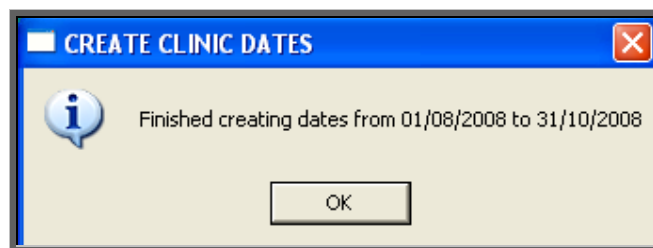
b)    Creating clinic dates for individual sessions

Menu:  Appointments – Venues

Find the Venue that you wish to create clinic dates for.

Press **Alt-T** and select Session to take you into the Session table. Using the up/down arrow keys on the keyboard, move to the Session that you wish to create

clinic dates for and then click on the 'clinician' icon (Session).
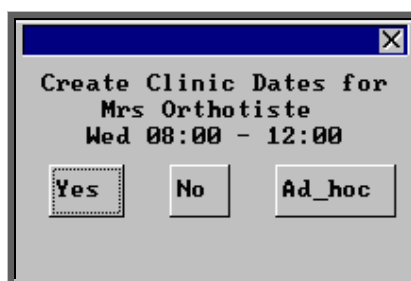
Create Clinic Dates for
Mrs Orthotiste
Wed 08:00 - 12:00

Yes        No        Ad_hoc

Select Yes to continue.

A calendar will appear in the middle of the screen to select the date of the first clinic you would like to create. It will default to the next occurrence of that clinic, but this can be changed to the date required.
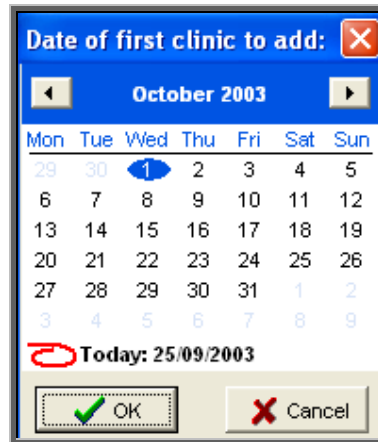


You will then be asked for the date of the last clinic to be created.   We recommend that you do not build dates too far into the future as this could affect the speed of the appointment section within OPAS.  Making clinic dates 3 to 6 months into the future would be ideal.
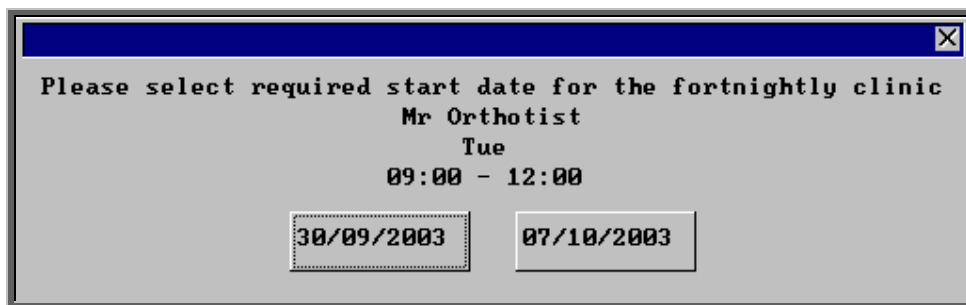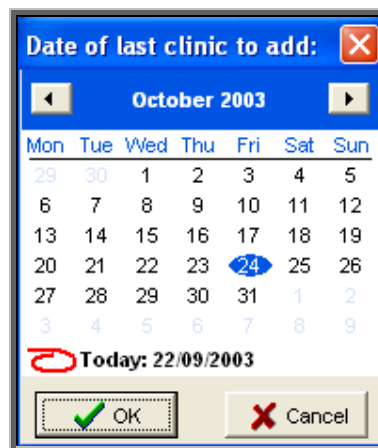


Having selected the 'last clinic' date, press **Enter** (click on OK). OPAS will now create the clinic dates.

If the date range you have entered overlaps dates that have already been created, duplicate dates will not be made as OPAS will check that the clinic date is not already there before it makes a new one.
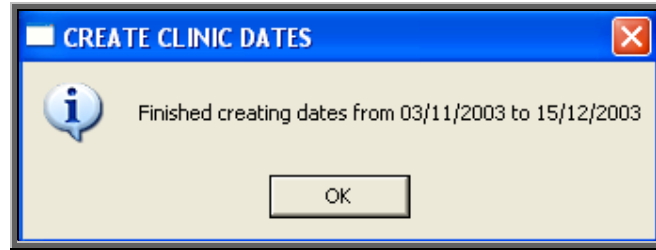
Once the dates have been created, you will be notified.

c)    Creating ad-hoc clinics

There may be occasions when you need to create additional clinic dates that are extra to the standard sessions e.g. a clinic that is not being held on the usual day due to a Bank Holiday.    This can be done using the ad-hoc facility.

Menu:  Appointments – Venues

Find the Venue that you wish to create clinic dates for.

Press **Alt-T** and select Session to take you into the Session table. Using the up/down arrow keys on the keyboard, move to a Session showing the Clinician who is running the extra clinic, and then click on the 'clinician' icon  (Session).
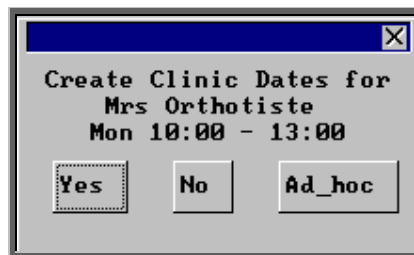


Select Ad_hoc to continue.
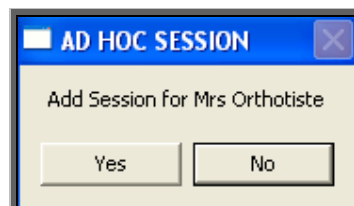


You will be asked to confirm that the ad-hoc clinic you wish to create is for the Clinician selected.

Select Yes to continue.

A calendar will appear in the middle of the screen to select the date of the ad-hoc clinic you wish to create. It will default to today's date, but this can be changed to the date required.
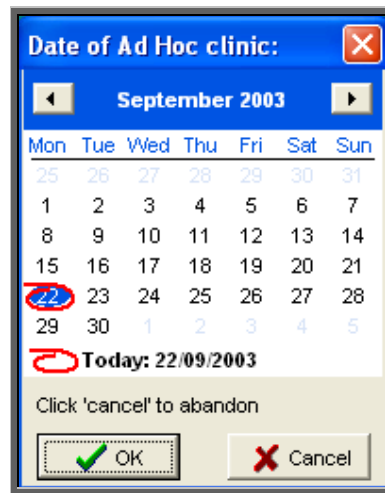


You will then be asked the time that the clinic will start;
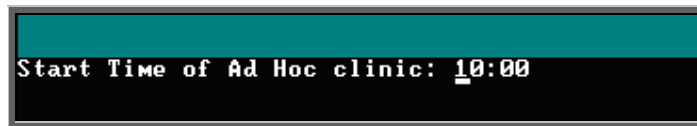


the time it will finish;
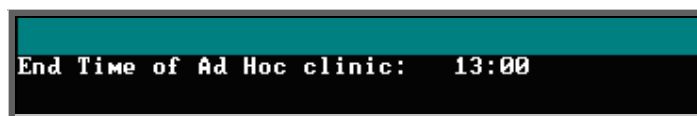


and then the times of the break (if applicable).
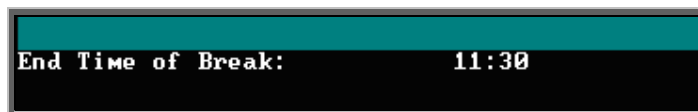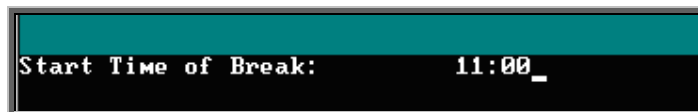




If you do not enter a time in the 'Start Time of Break' the 'End Time of Break' prompt will not be shown.

The following prompt will appear when the ad-hoc clinic has been created.
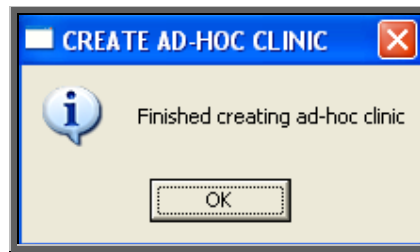
# 4.      Viewing/Amending clinic dates (sessions)

Once clinic dates have been created they can be viewed/amended in the Sessions screen.

There are two ways to get to the Sessions screen. Both options are explained below, but future chapters will prompt you to use Option 1 as this is usually the quickest way.  You can, however, use Option 2 in any future chapters where you have to go to the Sessions screen, if you prefer.

## Option 1

Menu: Appointments – Current – Sessions



A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

The date will default to today's date, and if you press the **Enter** key (click on OK) you will be taken to the first session for today. Alternatively you can select a date of your choice and press the **Enter** key (click on OK). Either way the rest of the sessions will be in date order.

If there are no sessions for the selected date, you will be taken to the first session after that date.

By pressing the **Esc** key at this prompt, you will be taken into the Sessions screen but you will be taken to the oldest current session and the sessions will be in Venue order.

Option 2

Menu: Appointments – Venues

Find the Venue whose clinic dates you wish to go to by using the 'arrow' icon (**F6**).

Then click on the 'clinics' icon (Goto, Clinics).

You will be taken into the Sessions screen and shown the oldest current session for that Venue.  The sessions will be in date order, but the quickest way to find the session you are looking for is to click on the 'find' icon (Data, Find) and select Date from the options at the top of the screen.

At the bottom of the screen type in the date you are looking for and press **Enter**.

If there is a session for that venue on that date you will be taken to it.  If, however, there is no session for the date entered, the following message will appear.
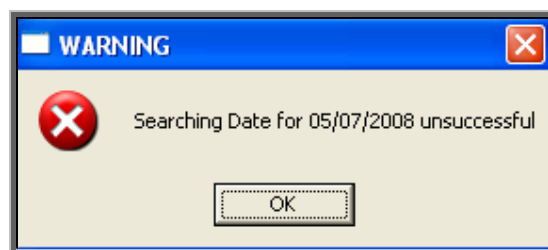


Note: When you go to the Session screen from the Venue screen, you will only be able to see sessions for that venue.

### The Sessions screen

Once you reach the Sessions screen (using either Option 1 or Option 2 above) the screen usually looks like this:



This is what we refer to as the **FULL** Session screen.  This is indicated by the word **FULL** in the top left corner of the screen.

In order to speed up the time taken to go initially into the Sessions screen and the time taken to move between sessions, we have added a File Swap option. This will work in the same way as the File Swap facility in the Patient screen.

If you click on the 'swap' icon  (File, Swap) the screen will change to the **FAST** session screen.

By clicking on the 'swap' icon  (File, Swap) again the screen will change back to the **FULL** session screen.

OPAS remembers which version of the Sessions screen you were last using. This information is held against your user name so each person can use the screen that they prefer.

If you leave the Sessions while in the **FAST** screen, when you next go into Sessions it will go into the **FAST** screen which will load much quicker. Once in the Sessions screen you can change back at any time to the **FULL** screen by clicking on the 'swap' icon  (File, Swap).

Editing sessions

If the details of a clinic change permanently, then this change of information must be recorded in the Venue screen (see Appointments – Note 2. Venues), so that when clinic dates are created in the future they will be built on the correct information. If, however, after creating the clinic dates, the details of the clinic change, then the individual clinic dates (sessions) can be edited.
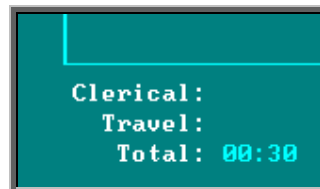
Having found the session to be amended (using Option 1 or Option 2 above), click on the 'update' icon  (Edit, Update).

You then have the ability to change the

> *Start time*
> *End time*
> *Break times*
> *Date*
> *Clinician*
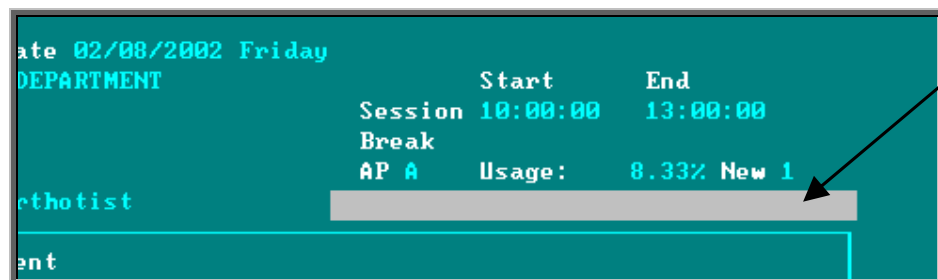
While you are in update mode you can also record the relevant time spent by the Clinician travelling to and from the clinic and time spent dealing with administration matters. This can be done by entering the relevant time in minutes in the *Clerical* and *Travel* fields underneath the session table.



The *Total* field will add together the appointment times and any entries in the *Travel* and *Clerical* field to give the whole time spent at the clinic.

You also have the ability to add a note onto the session screen. This *Note* field does not have a title to show where it is, but it is underneath the clinic times, and will become highlighted when you are on it.



Enter the note in the space (upto 35 characters). Once entered, the note will appear in red so that it stands out.

Once you have finished updating the session, press **Ctrl-Enter** to save the changes.

# 5.      Blocking clinic dates (sessions)

Blocking a session prevents any further appointments being made automatically in this session (i.e. when making appointments from the Orders, Patient screen or Waiting List screen, any available appointments on a blocked session will not be offered) and will warn you if you try to make an appointment manually.



Menu: Appointments – Current – Sessions

Find the session you wish to block and click on the 'block' icon  (Block).



To continue, click on OK, and at the bottom of the screen type the reason (up to 35 characters) why the session is being blocked.

Once the reason has been entered, press **Enter** and the session screen will now show who blocked the session, when and why.



A blocked session can be unblocked, simply by clicking on the 'block' icon  (Block) again.



Once a session is unblocked, all the red block banners disappear leaving the session open for making appointments. If you are looking at a session that you believe was

previously blocked, you can find out who unblocked the clinic and when by following the instructions below.

Click on the 'calculator' icon in the top right hand corner of the screen.

In the formulae box type **[Reason:]** and press the F5 key.

The answer will then be shown in the result box.

```
                                    ┌─ Result ──────────────────────────┐
                                    │        Unblocked by LINDA 14/07/2003 │
                                    │                  Text                │
                                    └──────────────────────────────────────┘



  ┌─ Formula ───────────────────────────────────────────────────────────
  [Reason:]
```

Once you have finished, press the Esc key to abandon the calculator option.

# 6.    Limiting the number of appointments per session

When appointments are created, they can be categorised as being a New, a Fitting, a Supply, a Review or a Cast appointment. This enables statistical analysis of your appointments, but as this information can be seen on the session it enables you to see at a glance the type of appointments already made for that session.

```
Clerical:           New 0  Supply 0  Fit 1  Review 0  Cast 0
   Travel:
    Total: 00:15  Usage:    11.11%
```

This can then be taken a step further by setting up in the system parameter screen the accepted number of each type of appointment per session. To do this, go into Utilities – Choices – System. Press the Pg-Dn key to see the Max Appointments section and fill in appropriately.

```
Max Appointments   New 2
per session      Supply 2
                    Fit 4
                 Review 2
0 = unlimited      Cast 1
```

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

```
                                              ☒
Recalculate SYSDEF.UW each start up session?

              No      Yes
```

Having done this, you will now be able to see on the Session screen when you have reached the maximum number of a type of appointment, and when you have exceeded it.

```
Clerical:        New 0  Supply 2  Fit 1  Review 0  Cast 0
  Travel:
   Total: 00:45  Usage:   33.33%
```

**Yellow** highlight indicates that you have reached your maximum for that type of appointment

```
Clerical:        New 0  Supply 3  Fit 1  Review 0  Cast 0
  Travel:
   Total: 01:00  Usage:   44.44%
```

**Red** highlight indicates that you have exceeded your maximum for that type of appointment

When you are making an appointment using an automatic method, (i.e. OPAS is looking for available appointments for you) sessions will not be offered where the maximum for that type of appointment has been reached.

Note: Appointments made from the Order screen create a Fitting appointment.

# 7.      Cancelling clinic dates (sessions)

A session can not be cancelled. If a session is no longer going to run, any appointments that have already been booked for the session need to be cancelled individually (*see Appointments – Note 13. Cancelling appointments*).  The clinic can then be blocked to prevent further appointments being made.

# 8.      Allocating appointments manually

There are five different ways of making an appointment on OPAS.  Three of them are automatic i.e. you are letting the system find the next available appointment, and two ways are manual methods i.e. you tell OPAS the date and time required.  You do not have to keep to one way of making appointments – the idea is to use whichever way is most suitable for the situation. The three automatic methods are explained in Notes 9, 10 and 11 that follow, while the two manual methods are covered below.

a)    Making manual appointments via the Sessions screen

Making appointments using the automatic methods are quicker, but there are times when you need to use the Sessions screen to make the appointment, as this is the only way that you can break the guidelines that you have laid down e.g. making an appointment outside the clinic times or for a blocked or full clinic.

Menu:  Appointments – Current – Sessions

A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

The date will default to today's date, and if you press the **Enter** key (click on OK) you will be taken to the first session for today. Alternatively you can select a date of your choice and press the **Enter** key (click on OK). Either way the rest of the sessions will be in date order.

If there are no sessions for the selected date, you will be taken to the first session after that date.

By pressing the **Esc** key at this prompt, you will be taken into the Sessions screen but you will be taken to the oldest current session and the sessions will be in Venue order.

Having selected the date required you will be taken to that days session. If there is more than one clinic running that day you may need to move to the next session using the 'arrow' icon ▶ (**F6**).

Once the correct session is found you will be able to see what appointments have already been made, and whether there is space to make any more.

```
┌──Sessions────────────────────────────────────────────────────────────┐
│FULL                                                                    │
│    Session      3306 Date 24/06/2008 Tuesday                           │
│    Clinic   Orthotic Clinic                          Start     End     │
│             NHS Trust Hospital            Session 13:30:00   15:45:00   │
│             Infirmary Road                Break                        │
│             Anytown                       AP P                         │
│    Clinician   Mrs Orthotiste                                          │
│   ┌Appointments──────────────────────────┐                            │
│   │Time  To     Patient                   │                            │
│   │ 13:30 13:45  Mr Sylvester Stalone      │   Appointments table shows │
│   │ 14:00 14:15  MR KELVIN BLOGGS          │   the first 14 appointments│
│   │ 14:30 14:45  MISS JULIE COLE           │   of the session           │
│   │ 14:45 15:00  MR TONY JACK              │                            │
│   │                                        │                            │
│                                                                        │
│   Clerical:         New 0  Supply 3  Fit 1  Review 0  Cast 0           │
│     Travel:                                                            │
│      Total: 01:00  Usage:    44.44%                                    │
└────────────────────────────────────────────────────────────────────────┘
```

*Total* shows the accumulative time (in hours/minutes) of appointments already made

Usage indicates how full the session is

See what type of appointments have been made

- The Appointments table will only display the first 14 appointment of the session. This should be enough to see all the appointments that have been made.

  If, however, there are more than 14 appointments on the session, press **Alt-T** and select Appointments. 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.

- When making an appointment, you can record whether the patient is

  | | |
  |---|---|
  | N | for new |
  | S | for supply |
  | F | for fit |
  | R | for review |
  | C | for casting |

  This information is then displayed at the bottom of the Session screen, so at a glance, you can see how many of each type of patient is booked in for that session.

  This can then be taken a step further by setting up in the system parameter screen the accepted number of each type of appointment (see Appointments – Note 6. Limiting the number of appointments per session)

- If, having looked at the session, you decide it is already too full to make any more appointments on, you can move to the next session using the 'arrow' icon  (**F6**) or search for an alternate date using the 'find' icon  (Data, Find).

## Making the appointment

Once you have found the session you wish to make an appointment on, click on the 'appointment' icon  (Appointments, Add).
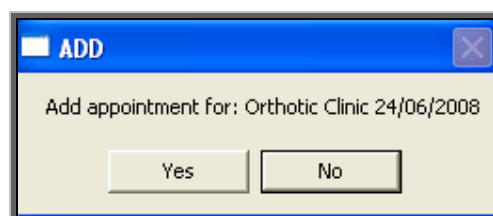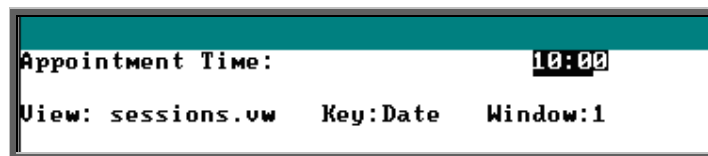
You are asked to confirm that you wish to make an appointment for this session. Click on **Yes** to continue.

Note:  An appointment cannot be created for a patient that has not been entered onto OPAS.  If you suspect that the patient has not yet been entered onto OPAS, you should select **No** and go back to the **Patients** screen and add them as a patient first.

At the bottom of the screen you will be asked to enter the time of the appointment required.

```
Appointment Time:                    10:00

View: sessions.vw    Key:Date    Window:1
```

If you select an appointment time that is already taken you will get the following message and have to try adding an appointment again, this time with a valid time.

SORRY
Selected time not available
OK

Note: Although you cannot add two appointments with the same start time, you can manually add appointments that overlap i.e. you cannot have two 15-minute appointments at 10.00, but you can have a 15-minute appointment at 10.00 and another 15-minute appointment at 10.05.

If you select an appointment time that is outside the normal clinic times you will get the following prompt, but you can continue to make the appointment if necessary.

WARNING
Outside normal clinic times! Book anyway?
Yes    No
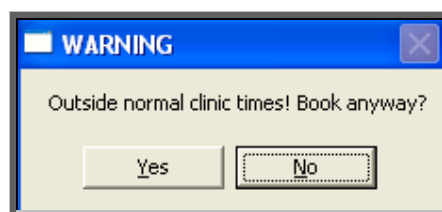
Once you have selected a valid appointment time you will be taken to the appointment screen where the details of the appointment can be completed. The fields below in red **must** be completed.  The other fields are optional.

*Duration*        will default to your standard appointment length (as set up in Utilities – Choices – System) but can be changed to the length of appointment required

*Patient*         select the patient from the pop-up list

If a this point, you discover that the patient hasn't yet been registered on OPAS and therefore they are not in the pop-up list, press **Esc** and type **N** to abandon the appointment screen.

```
Save current changes to record?  (y/n)  ▄
```

*Full*            enter Y if this is a fully booked appointment.  You can control what defaults into this field using the default screen (Utilities – Choices – Defaults)

*Partial*         enter Y if this is a partially booked appointment. NB. if you enter Y in the *Full* field, N will automatically default into the *Partial* field and visa versa

*Consref*         if the referrer entered on the patient record is not the referrer who referred the patient for this appointment, then an alternate referrer can be selected from the pop-up list (press **Tab** to show the pop-up list).

*Purchaser*       if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press **Tab** to show the pop-up list)

*Order*           if the appointment relates to an order that has been entered on OPAS, then the order number can be entered here.  If you know that there is an order, but cannot remember the order number, press the **Tab** key to see a pop-up list of all the orders.

```
No        Hospital No
C00219    ABC23456
G00220    ABC23456
G00221    786756
G00222    AH280965
G00223    776655
G00224    G54367
```

Move the green cursor into the Hospital No column and type in the patients Hospital number to show the order numbers for that patient.

*Notes*        enter the reason for the appointment here. What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.

*Comments*     additional comments can be entered here. These do not appear on appointment letters but can be printed on clinic lists.

*Event*        an event can be attached to an appointment. This gives the Clinician the opportunity to attach specific notes after he has seen the patient. This is achieved by answering set questions that relate to the type of appointment. *(see Note 20 – Appointments – Auditing appointments*). The *Event* field can also be used for assigning RTT actions (see Care Episodes – Note 9. 18 Week Journey).

*Letter*       will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities – Note 15. Choices - Letters)

*Advised*      it is this field that controls whether an appointment letter is printed. If you require an appointment letter to be printed, then leave this field blank. If you do not want an appointment letter to be printed, then enter a date here (pressing **F2** will insert today's date for you).

*Episode*      if the appointment relates to a care episode that has been entered on OPAS, then the case number can be entered here. If you know that there is a care episode, but cannot remember the case number, press the **Tab** key to see a pop-up list of all the care episode.

| Case: | Patient: |
|---|---|
| CE00010 | NQ123432 |
| CE00011 | NTEMP000009 |
| CE00012 | NQWE2345678 |
| CE00014 | NXYZ0987654 |
| CE00015 | NQ123432 |
| CE00016 | NXYZ0987654 |

Move the green cursor into the Patient: column and type in the patients Hospital number to show the care episodes for that patient.

*New*              enter **Y** if this is a new patient, or **N** if they have been seen before.

Alternatively select    S    for supply
                        F    for fit
                        R    for review
                        C    for cast

*Type*             enter either

                   O    for an Out-patient
                   I    for an In-patient
                   W    for a Walk-in patient

(Note: When an appointment is created for a walk in patient, the *Outcome* field will automatically be marked as Attended.)

*Referral*         if this is a new referral, the date of the referral can be entered here. This would then give you the ability to analyse how long it has taken from referral to appointment.

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

```
Earliest: 10:00:00
   Latest: 16:00:00
```

When making an appointment manually in the session screen, a warning message will appear if the time given to the patient does not agree with times entered in these fields.

```
Day: Monday                              Day: Monday
Time 09:30:00          Duration 15       Time 16:15:00          Duration 15
Too early for this patient               Too late for this patient
Patient 12345QWERTY    New:    Type:     Patient 12345QWERTY    New:    Type:
```

Having been given the warning message, if you continue to make the appointment anyway, the message will dissapear when you have finished filling in the appointment details.

b)    Making manual appointments via the Diary screen.

The Diary screen isn't as flexible as the Session screen, in that you can not make appointments outside the clinic times or double book appointment times. However, all sessions for the same day are shown on one screen, and it is easier to see availability.

Menu: Appointments – Current – Diary
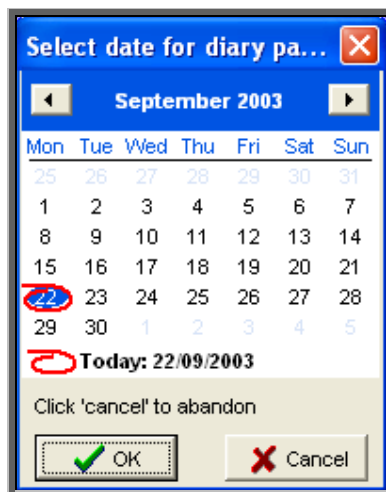


A calendar will appear in the middle of the screen for you to select the date of the session you wish to go to.

The date will default to today's date, and if you press the **Enter** key (click on OK) you will be taken to the diary page for today. Alternatively you can select a date of your choice and press the **Enter** key (click on OK).

Having entered the date required you will be taken to that days diary page.

The Diary screen default display shows the name of the patients occupying each appointment slot.



To change the name to show the reason for each appointment slot, click on Display, Notes at the top of the screen.

If you wish to revert back to patient names, click on <u>D</u>isplay, <u>N</u>ames at the top of the screen.

The red area of the screen represents times outside the clinic hours, whereas the lighter grey area is available for making appointments. The darker grey area indicates that the session is blocked. Unlike making an appointment in the Session screen, you **can not** make appointments in the Diary screen that are outside the clinic hours.

If you are unsure whether the clinic is blocked or not, simply click on the grey area and if it is blocked it will say so.
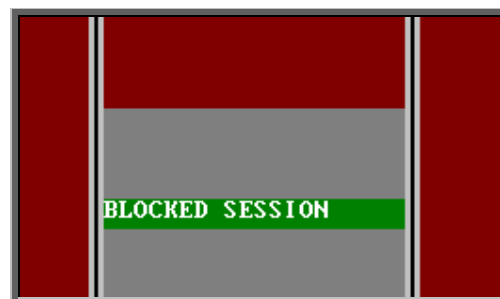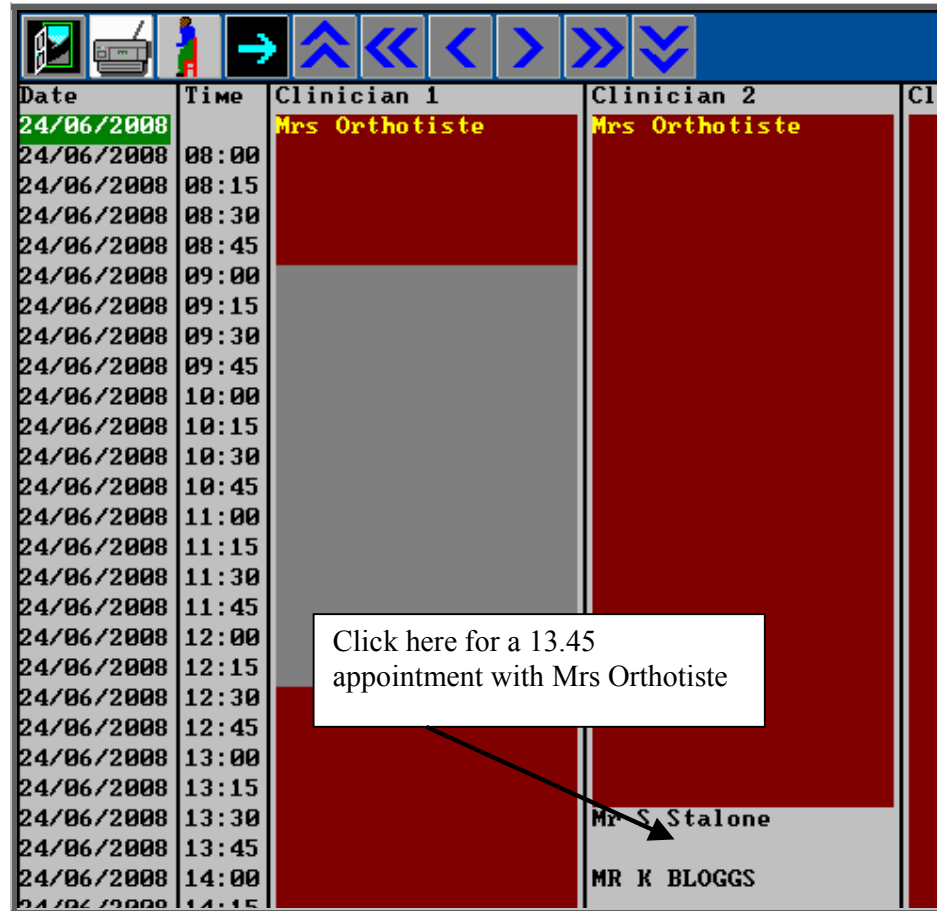


You can make appointments for blocked clinics in the Diary screen. You will be warned that the clinic is blocked, but allowed to continue. (In the same way that it does in the Session screen).

Making the appointment

You will be able to see which appointments have been allocated, as these will contain the patient's name.

To make an appointment, click on the 'appointment' icon  (Appoint), and then click with the mouse by the slot you wish to take.



If you need to take more than one slot (i.e. a half hour appointment) click on the first slot as you will be able to change the length in the Appointment screen. The following prompt will appear for you to confirm that you have selected the correct time, Clinician and Clinic. Click on OK to continue.

You will then be taken into the **Appointment** screen to fill out the details of the appointment. The fields below in red must be completed.  The other fields are optional.

*Duration*            will default to your standard appointment length (as set up in **Utilities – Choices – System)** but can be changed to the length of appointment required

*Patient*            select the patient from the pop-up list

If a this point, you discover that the patient hasn't yet been registered on OPAS and therefore they are not in the pop-up list, press **Esc** and type **N** to abandon the appointment screen.



*Full*            enter Y if this is a fully booked appointment.  You can control what defaults into this field using the default screen (**Utilities – Choices – Defaults**)

*Partial*            enter Y if this is a partially booked appointment. NB. if you enter Y in the *Full* field, N will automatically default into the *Partial* field and visa versa

*Consref*            if the referrer entered on the patient record is not the referrer who referred the patient for this appointment, then an alternate referrer can be selected from the pop-up list (press **Tab** to show the pop-up list).

*Purchaser*            if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press **Tab** to show the pop-up list)

*Order*            if the appointment relates to an order that has been entered on OPAS, then the order number can be entered here.  If you know

that there is an order, but cannot remember the order number, press the Tab key to see a pop-up list of all the orders.

| No | Hospital No |
|---|---|
| C00219 | ABC23456 |
| G00220 | ABC23456 |
| G00221 | 786756 |
| G00222 | AH280965 |
| G00223 | 776655 |
| G00224 | G54367 |

Move the green cursor into the Hospital No column and type in the patients Hospital number to show the order numbers for that patient.

*Notes*          enter the reason for the appointment here.

What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.

*Comments*      additional comments can be entered here.  These do not appear on appointment letters but can be printed on clinic lists.

*Event*          an event can be attached to an appointment. This gives the Clinician the opportunity to attach specific notes after he has seen the patient.  This is achieved by answering set questions that relate to the type of appointment. *(see Note 20 – Appointments – Auditing appointments*). The *Event* field can also be used for assigning RTT actions The *Event* field can also be used for assigning RTT actions (see Care Episodes – Note 9. 18 Week Journey).

*Letter*         will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities – Note 15. Choices - Letters)

*Advised*        it is this field that controls whether an appointment letter is printed. If you require an appointment letter to be printed, then leave this field blank.  If you do not want an appointment letter to be printed, then enter a date here (pressing F2 will insert today's date for you).

*Episode*        if the appointment relates to a care episode that has been entered on OPAS, then the case number can be entered here.  If you know that

there is a care episode, but cannot remember the case number, press the **Tab** key to see a pop-up list of all the care episode.



Move the green cursor into the Patient: column and type in the patients Hospital number to show the care episodes for that patient.

*New*        enter Y if this is a new patient, or N if they have been seen before.

Alternatively select    S     for supply
F     for fit
R     for review
C     for cast

*Type*       enter either

O     for an Out-patient
I      for an In-patient
W     for a Walk-in patient

(Note: When an appointment is created for a walk in patient, the *Outcome* field will automatically be marked as Attended.)

*Referral*   if this is a new referral, the date of the referral can be entered here. This would then give you the ability to analyse how long it has taken from referral to appointment.

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



When making an appointment manually in the session screen, a warning message will appear if the time given to the patient does not agree with times entered in these fields.

Having been given the warning message, if you continue to make the appointment anyway, the message will dissapear when you have finished filling in the appointment details.

# 9.     Allocating appointments automatically (via order)

Appointments can be made automatically when you tell OPAS that the goods on an order have been received.  This is probably the most effective way of making appointments, as two tasks are been completed in one step.

Menu:  History – Orders

Find the relevant order using the 'find' icon  (Data, Find).  (You can find the order in the Patients screen but if you have a lot of orders to book in it is much quicker this way)

Check that 'A' has been entered in the *ACO* field, as this is what tells OPAS to make an appointment when the goods are booked in.

At the top of the screen above the icons, click on the 'goods in' icon  (Goods, In).

If the patient already has a future appointment, then you will be shown the existing appointment and asked if it will do, or whether you do need to make another appointment.

If you do wish to make another appointment or if there was no existing appointment for the patient you will be told the first 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 (a) and system parameter screen (b).

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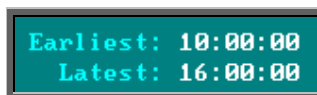


If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.

I
 b)   If you do not want OPAS to start searching for availability straight away, a delay can be set in the System parameters screen.

To do this, go into Utilities – Choices – System, and enter the number of days in the *Automatic Delay* field within the Appointments section.
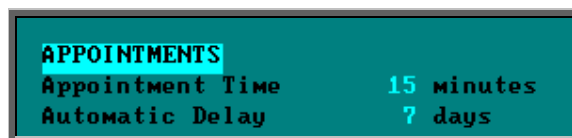


Once an appointment has been found, the following message will appear.



The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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

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.

Appoint available at 10:00 on Monday 05/02/2001

| Accept | Later | Next | Previous | First |

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.

**APPOINTMENT MADE**

Is a patient advice letter required?

| Yes | No |

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.
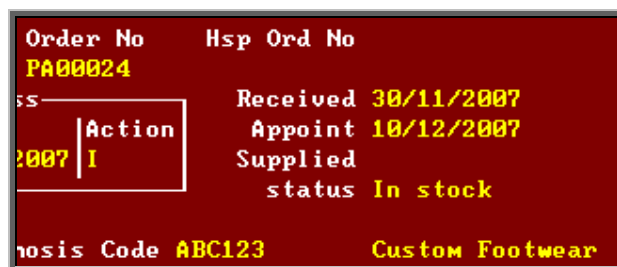


Notes.

1)    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.

2)    What goes into the *Notes*: field on the appointment can be controlled using a Default.

      To do this go into Utilities – Choices – Defaults. Find default Number 48

      and click on the 'update' icon  (Edit, Update). At the bottom of the screen you will be asked to type in the New Default.

      Type the word you want to appear in the *Notes*: field and press **Enter**.

      If you want the *Description* field from the Order to appear in the *Notes*: field, type in the following formulae:

          **=dbget("[applianc.description]")**

      Contact the OPAS helpdesk if you need help with this new default

3) A default event can be set for appointments made from the order.

   To do this, go into Utilities – Choices – System.

   Select the event you want to appear in the *Event for Fittings* (You can press Tab to get a list of events).

```
                                    Fit 4
                                 Review 2
         0 = unlimited             Cast 1
         Event for Fittings       First Fit
```

# 10.   Allocating appointments automatically (via patient record)

Appointments can be made from the Patient screen. This is an alternative way of making an automatic appointment when there is not an order (e.g. assessment appointment) or if you want to make the appointment before the goods have arrived.

Menu: Patients

Find the relevant patient using the 'find' icon (Data, Find).

Click on the 'next appointment' icon (Appointment, Next), to load the appointment selection screen below.

```
 Next
                       Prefers Mondays
    Clinic:

 Clinician:

      Day:

   AM/PM:           New:

 Duration:

     From:

      For:
```

Contents of the *Comments* field on the main patient record are shown here in case they are relevant to the appointment being made

The fields below in red must be completed.  The other fields are optional.

*Clinic*              select the clinic venue you wish to make the appointment for (from the pop-up list)

Clinician          if you have a preference as to which Clinician the patient is seen by then select a Clinician from the pop-up list.  If the patient can see any Clinician that has a clinic at the venue selected then leave this field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.

Day                if you have a preference as to which day of the week the patient is seen then select a day from the pop-up list.  If the patient can attend any day when there is a clinic at the venue selected then leave this field blank by pressing **Esc** to remove the pop-up list, and then press **Enter** to move to the next field.

AM/PM          if you have a preference as to whether the patient is seen in the morning, afternoon or evening then enter A for morning, P for afternoon or E for evening.  If the patient can be seen any time when there is a clinic at the venue selected then press **Enter** to leave this field blank and move to the next field.

This function will only work effectively if your clinic sessions are set up as half-day sessions.  All day sessions are classed as AM sessions so you may wish to change any full day sessions you have into two separate sessions (one for the morning and one for the afternoon) so that you can make full use of this functionality.

*New*              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, R for review or C for cast

*Duration*         will default to your standard appointment length (as set up in Utilities – Choices – System) but can be changed to the length of appointment required.

*From*             will default to tomorrows date but can be changed to the date you wish to start looking for available appointments.  This is useful when you wish to make a review appointment some time into the future.

*For*              enter the reason for the appointment. This will then be put into the *Notes:* field on the new appointment for you.

The system will now look for the first available slot from the date selected.  If the patient already has a future appointment, then you will be shown the existing

appointment and asked if it will do, or whether you need to make another appointment.



If you do wish to make another appointment, or if there was no existing appointment for the patient, you will be told the first available appointment based on the criteria entered in the appointment selection screen and also information held on the patient record

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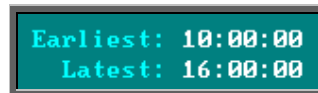


If times are entered into either or both of these fields, the time of the offered appointment will be restricted accordingly. In the above example, no appointments will be offered before 10am or after 4pm.



The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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

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:



You will then be given the opportunity to edit the appointment.

There are a number of reasons why you may want to do this.

- to allocate a different letter type other than the standard letter

- to add additional information in the comments field

- to add an event

If you do not wish to edit the appointment, click on No and you will return to the patient screen. If you do wish to edit the appointment, click on Yes to be taken into the appointments screen, where you can make the necessary alterations.

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

# 11.    Allocating appointments automatically (via waiting list)

Appointments can be made for patients on the waiting list using any of the available methods.  If you are using care episodes and need to link the appointment to both the waiting list and the care episode, then the appointment must be made from the Waiting List screen.

a)    Making appointments from the Waiting List screen

The Waiting List screen can be accessed by either

- Menu: Patients

  Find the relevant patient records and click on the 'waiting list' icon  (Goto, Waiting List, Current).

or

- Menu: Waiting List – Current

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

There are 2 'clock' icons on the waiting list screen,  and  .

a)   The first 'clock' icon  (Appoint, Next) will take you to the Next appointment selection screen.



This screen in the usual way (see Note 10. - Making an appointment manually (via the Patient)). However if you have entered the *Venue:, Clinician:, APE, New, Length:* and/or *For:* fields on the Waiting List screen, these fields will automatically flow through into this screen as you enter through each field, saving time on rekeying.

b)   The 'autoclock' icon  (Appoint, Quick) can be used if the *Venue:* field has been completed on the Waiting List screen. The 'autoclock' option bypasses the Next selection screen and makes an appointment based on the information on the Waiting List screen (i.e. *Clinician:, APE, New, Length*: and *For:* fields).

When using the 'autoclock' option, OPAS will start looking for the next appointment after the number of days delay set in the System parameter screen. (see below)

And if the *Length* field has not been completed on the Waiting List screen OPAS will take your default appointment time from the System parameter screen. (see above)

If you select the 'autoclock' option when the Venue has not been selected in the Waiting List screen, the following error message will appear.
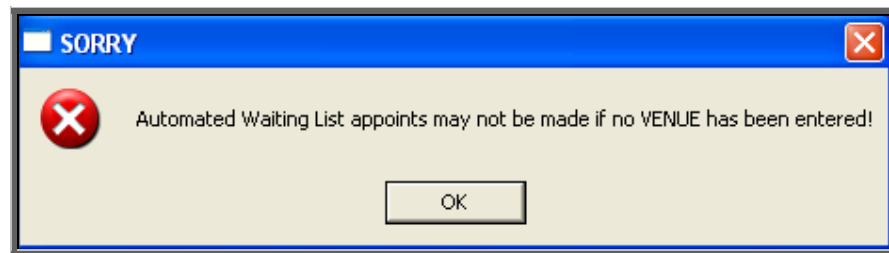


Whichever clock is used, the appointment made will be linked to the waiting list record and the date of the appointment will be entered into the *Appointment:* field on the Waiting List screen so that you know there is a future appointment booked.



The Appointment screen will also show that the appointment is linked to the waiting list.



b)    Other methods of making appointments

If an appointment is made using the 'clock' icon [clock icon] on the Patient or Care Episode screen, or manually through the Session or Diary screen, OPAS will check to see if the patient is on the waiting list, and if they are, and an appointment hasn't already been assigned, you will be asked if you wish to link the appointment to the waiting list.
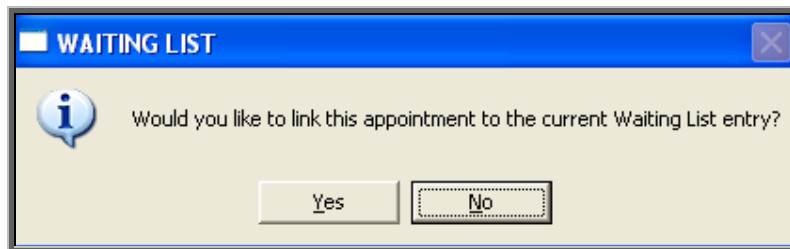
If **Yes** is selected, the date of the appointment will be entered into the *Appointment:* field on the **Waiting List** screen so that you know there is a future appointment booked.



The **Appointment** screen will also show that the appointment is linked to the waiting list.



# 12.   Amending appointments

Finding the appointment to be amended

To amend an appointment, you first need to find the appointment you wish to amend. There are three ways to find a specific appointment. These are listed below, with the quickest method first.

a) **Patients**.  Find the patient record and then click on the 'appointment' icon (Appointments, Current)

b) **Appointments – Current – Sessions**. Go to the session the appointment is for and click on the 'maintain' icon (Appointments, Maintain).

c) Appointments – Current – Appointments. Find the appointment by searching on the patient's hospital number.

Having found the appointment you wish to amend, click on the 'update' icon  (Edit, Update).

The following fields may be updated.  Those in red have a pop-up available. Press Tab to access the pop-up, if you need to select an alternate option.

*Duration*

*Advised*           (entering a date in here will stop an appointment letter being printed – taking the date out will enable the letter to be printed again)

*Letter*
*Type*
*New*
*Referral*
*Referrer*
*Purchaser*
*Notes*
*Comments*
*Event*
*Care Episode*
*Grade*
*Priority*
*Full* and *Partial*
*Order*
*Outcome*

*Booked*            (entering a date in here will stop the transport memo being printed – taking the date out will enable the memo to be printed again)

*Reminder*          (entering a date in here will stop a reminder letter being printed – taking the date out will enable the letter to be printed again)

**The patient cannot be amended.  If you wish to offer the appointment time to another patient, the original appointment should be cancelled, and another one made for the new patient.**

# 13.    Cancelling appointments

a)    Finding the appointment to be cancelled

To cancel an appointment, you first need to find the appointment you wish to cancel. There are three ways to find a specific appointment. These are listed below, with the quickest method first.

a)  **Patients**.  Find the patient record and then click on the 'appointment' icon

 (Appointments, Current)

b)  **Appointments – Current – Sessions**. Go to the session the appointment

is for and click on the 'maintain' icon  (Appointments, Maintain).
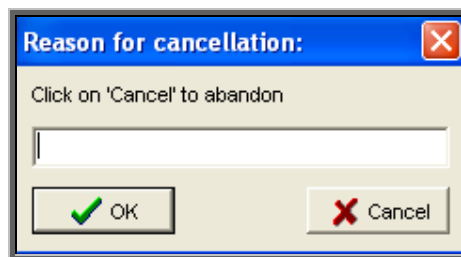
c)  **Appointments – Current – Appointments**. Find the appointment by searching on the patient's hospital number.

b)    Cancelling the Appointment

1.    Having found the appointment you wish to cancel, click on the 'cancel' icon

  (Cancel).



2.    You will then be asked to enter the reason for cancelling.

3.    Type in the reason (leave blank if you wish to) and click on OK to continue.  If you wish to abandon cancelling the appointment, click on Cancel.

4.    After you have entered the reason for the cancellation, you will be asked whether the Hospital or Patient cancelled the appointment.
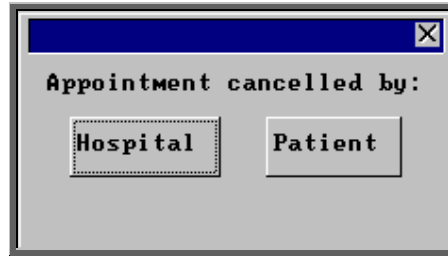
- If Patient is selected the *Outcome* field on the appointment will be automatically populated with Could not Attend.

- If Hospital is selected the *Outcome* field on the appointment will be automatically populated with Cancelled by Hospital.

In order for this to work you must ensure that the two outcomes are set up in Utilities – Choices – Appointment – Appointment Outcome. The Could not Attend outcome should already exist, but you may need to add a new outcome of Cancelled by Hospital. (For how to add appointment outcomes see Utilities – Note 2. Choices - Appointment)

Once the two outcomes have been defined, they need to be entered into the system parameter screen. Select Utilities – Choices – System and press the **Pg-Dn** key. Enter the relevant outcome reference numbers next to the *CNA:* and *CBH:* lines.
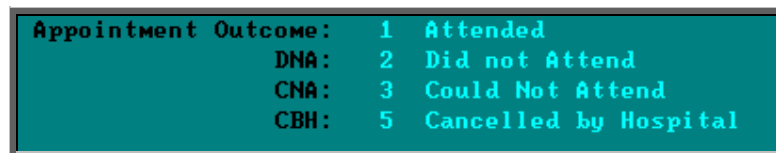


5.  If transport was required, you will be told so that the arrangements with the ambulance service can be cancelled.
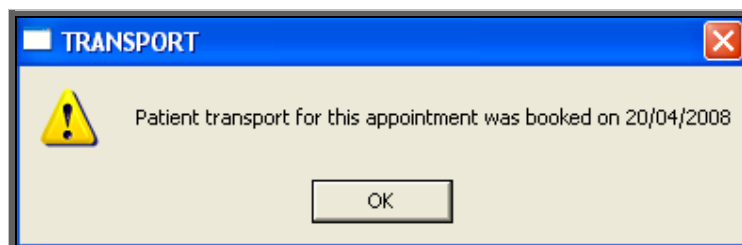


Warning. Cancelled appointments cannot be un-cancelled.  If an appointment is cancelled be mistake you will need to make the appointment again.

c)    Making a Replacement Appointment

Once the appointment has been cancelled, you will be asked if you would like to make a new appointment for the patient.
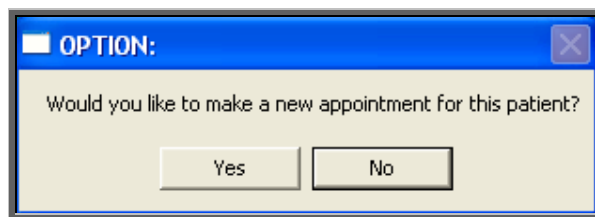


If you select Yes, OPAS will search for the next available appointment, looking at appointment dates 7 days before the cancelled appointment or from tomorrows date (which ever is the later). You will be offered a new date/time that is for the Venue and Clinician that the original appointment was for.  If the appointment relates to an order where you specified the day the appointment needed to be on, then only appointments for that day will be offered.



The screen behind the message box above will be showing you the session screen for that clinic, so that you can see what appointments have already been made.

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

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:



You will then be given the opportunity to edit the appointment.



The appointment information that was entered when the original appointment was created will be copied into the new appointment e.g. Notes, Order number etc

If you do not wish to edit the appointment, click on No.  If you do wish to edit the appointment, click on Yes to be taken into the appointments screen, where you can make the necessary alterations.

When you have finished editing, press **Ctrl-Enter** to save and return to the appointment that has just been cancelled.

### d)   Recording Cancelled Appointments

When an appointment has been cancelled a note is automatically entered on the patient record giving the details of the cancelled appointment. Looking at the note in full (clicking on the 'note' icon  (Goto, Notes)) will show why the appointment was cancelled, by whom and the reason for the original appointment.
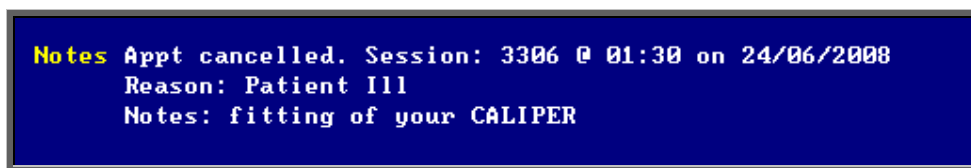


Also, the appointment that was cancelled will show why the appointment was cancelled.
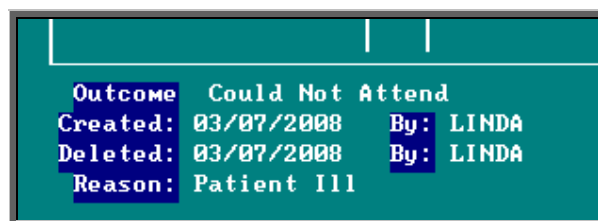


Also, within the system parameters (Utilities – Choices – System) there is an option that can be set to either Keep or Remove cancelled appointments.  If this parameter is set to Remove, all references to the cancelled appointment will be removed.   The only evidence of the cancelled appointment is the note that is automatically entered on the patient record (see above), and in Appointments – Current/Archived - Appointments.  If the parameter is set to Keep, the cancelled appointment will stay on the session screen and patient record, but will be highlighted in red so that it is clear that it has been cancelled.  It will also stay on the clinic list, but marked as cancelled.

However, whether the parameter is set to **Remove** or **Keep**, when an appointment is cancelled, that appointment time becomes available again so that another patient can be offered it. Cancelled appointments will also be taken into the archive when run, so that they can be incorporated into reports.

# 14.    Instant printing appointment letters

There is a switch in the system parameters that will result in appointment letters being printed instantly i.e. as the appointments are raised.  This is an alternate method to batch printing (see Note 16. Batch printing appointment/collection letters).

If you want each individual appointment letter to print automatically when you have finished inputting the appointment there are two switches to set.

1)    Go into **Utilities – Choices – System** and select **Yes** in the *Instant Appt Letters* field.



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



Press the **Enter** key.

2)   Go into **Appointments – Venues** and enter **Y** in the *Instant:* field for each venue that wants to instant print.



Having two switches enables hospitals to have some venues instant printing while others choose to print in batch.

Once these switches have been activated, whenever you make an appointment (using **any** method) the appointment letter will print as soon as the appointment has been completed. The only exception to this is in the Diary screen, where the letter prints once the Diary screen has been exited.

# 15.      Instant printing collection letters

There is a switch in the system parameters that will result in collection letters being printed instantly i.e. as the goods are booked in on the order.  This is an alternate method to batch printing (see Note 16. Batch printing appointment/collection letters).

If you want each individual collection letter to print automatically when you book goods as received on the order, there are two switches to set.

1)   Go into **Utilities – Choices – System** and select **Yes** in the *Collection Letters* field.

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



Press the **Enter** key.

2)   Go into **Appointments – Venues** and enter Y in the *Instant:* field for each venue that wants to instant print.



Having two switches enables hospitals to have some venues instant printing while others choose to print in batch.

# 16.   Batch printing appointment/ collection letters

There are a number of ways of batch printing appointment letters. Which method you use will be determined by which letters need to be printed. Option 1 is the preferred method as this will print all appointment and collection letters that are waiting to be printed. Option 2 looks at printing those appointment and collection letters outstanding on a particular session, and Option 3 looks at how to print individual appointment or collection letters for a specific patient.

Option 1.   Printing all outstanding appointment/collection letters.

Menu: Appointments – Print – Letters

This option is used to print both appointment and collection letters.

On entering the Letters screen you will be shown a record for each letter that still requires to be printed (i.e. the advised field is blank and the appointment date is in the future).  If there are not any letters waiting to be printed, the message box below will appear instead.



To print the letters click on the 'auto-print' icon  (Auto-print).  This will then print all the letters that are eligible for printing.   The advised field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the Letters screen in future.

If there are not any letters produced, the following message box will appear, which explains the possible reasons why.



> You cannot make an appointment for a patient that is marked as deceased, but this will stop a letter being printed if the patient was marked as deceased between making the appointment and printing the letter

> There are 26 different types of appointment and collection letters. Within the user screen you can set up which letters will print for each user when using auto-print (see Utilities – Note 55. Users)

If you need to reprint an appointment letter, find the relevant appointment and simply remove the date from the *Advised* field (using Edit, Update). Then select Appointments – Print – Letters and run Auto-print again.

Option 2.   Printing outstanding appointment/collection letters for a session.

Menu: Appointments – Current – Sessions

Find the session required and click on the 'letters' icon [icon] (Letters).

To print the letters click on the 'auto-print' icon [icon] (Auto-print).  This will then print all the letters that are eligible for printing.   The advised field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the Letters screen in future.

If there are not any letters produced, the following message box will appear, which explains the possible reasons why.

| |
|---|
| **SORRY** |
| No letters have been printed. This could be because the patients are deceased or there are no letter types that you can print. |
| You can print letter types: (A) |
| OK |

You cannot make an appointment for a patient that is marked as deceased, but this will stop a letter being printed if the patient was marked as deceased between making the appointment and printing the letter

There are 26 different types of appointment and collection letters. Within the user screen you can set up which letters will print for each user when using auto-print (see Utilities – Note 37. Users)

When printing appointment letters from the Sessions screen, this message box will also appear if there are no outstanding appointment letters for this session (i.e. they have already been printed).

If you need to reprint an appointment letter, find the relevant appointment and simply remove the date from the *Advised* field (using Edit, Update) and run the Autoprint option again.

Option 3.   Printing individual appointment/collection letter for a patient.

In the first two options, OPAS will check that the unprinted appointment letter isn't for an appointment and will not print it if it is.  Printing the letter from the Patient screen will print the letter regardless of the appointment date. This can be useful, for example, if you have a patient that needs a copy letter for their employer.

Menu: **Patients**

Find the patient whose appointment letter you wish to print and click on the 'appointment' icon  (<u>A</u>ppointments, <u>C</u>urrent).

Now click on the 'letters' icon  (Letters). If you need to reprint an appointment letter, simply remove the date from the *Advised* field (using <u>E</u>dit, <u>U</u>pdate) first.

To print the letter click on the 'auto-print' icon  (<u>A</u>uto-print). The advised field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the **Letters** screen in future.

If there are not any letters produced, the following message box will appear which explains the possible reasons why.



You cannot make an appointment for a patient that is marked as deceased, but this will stop a letter being printed if the patient was marked as deceased between making the appointment and printing the letter

There are 26 different types of appointment and collection letters. Within the user screen you can set up which letters will print for each user when using auto-print (see Utilities – Note 37. Users)

# 17.    Printing transport memos
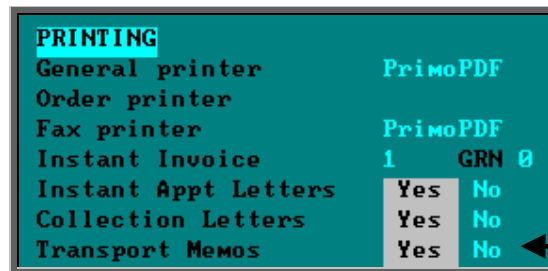
There are four options available for printing transport memos.

## Option 1.  Instant printing

There is a switch in the system parameters that will result in transport memos being printed instantly i.e. as the appointments are raised.
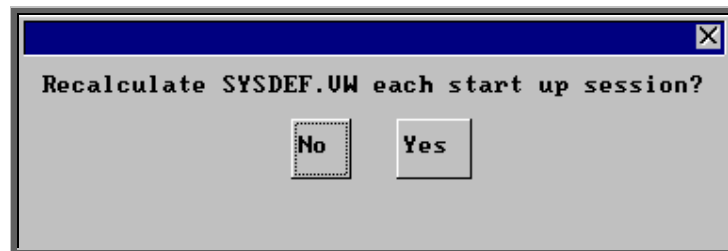
If you want each individual transport memo to print automatically when you have finished inputting the appointment there are two switches to set.

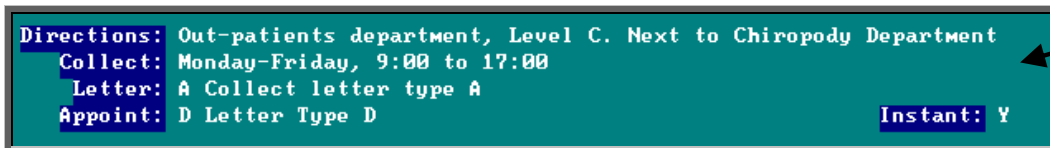1)   Go into Utilities – Choices – System and select Yes in the *Transport Memos* field.
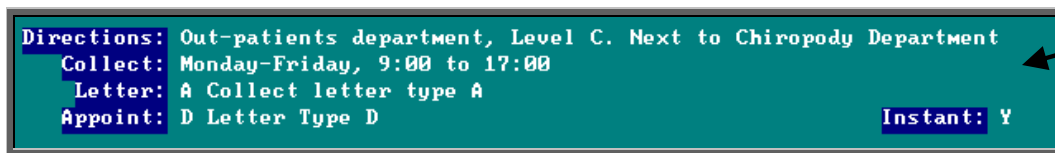
```
PRINTING
General printer           PrimoPDF
Order printer
Fax printer               PrimoPDF
Instant Invoice           1     GRN 0
Instant Appt Letters      Yes   No
Collection Letters        Yes   No
Transport Memos           Yes   No   ←
```
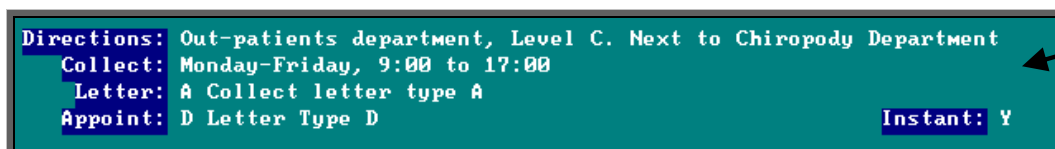
Press **Ctrl-Enter** to save the changes made.  The following prompt will appear.

```
[X]
Recalculate SYSDEF.UW each start up session?

        No        Yes
```

Press the **Enter** key.

2)   Go into Appointments – Venues and enter Y in the *Instant:* field for each venue that wants to instant print.

```
Directions: Out-patients department, Level C. Next to Chiropody Department
   Collect: Monday-Friday, 9:00 to 17:00
    Letter: A Collect letter type A
   Appoint: D Letter Type D                          Instant: Y
```

Having two switches enables hospitals to have some venues instant printing while others choose to print in batch.

Once these switches have been activated, whenever you make an appointment (using **any** method) the transport memo will print as soon as the appointment has been completed. The only exception to this is in the Diary screen, where the memo prints once the Diary screen has been exited.


Option 2.  Batch printing from the letters screen


Menu: Appointments – Print – Letters

If you are in the Letters screen printing appointment and collection letters, then you can use the 'transport' icon [icon] (Transport) to print the transport memos.

Once the memos have been printed, OPAS will enter today's date in the *Transport Booked:* field and the name of the person who printed them in the *By:* field.

Transport Booked: 19/03/2001
            By: LINDA
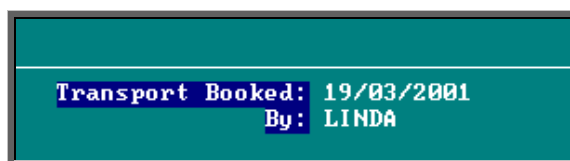
If you need to reprint a transport memo, find the relevant appointment and simply remove the date from the *Transport Booked:* field (using Edit, Update) and run the Transport option again.


Option 3. Batch printing from the transport screen

Menu: Appointments – Print – Transport

If you only want to print transport memos, you may choose to use this option instead. The Transport screen will show all those appointments that require transport, where the transport memo has not yet been printed and the appointment date is in the future.

If there are no transport memos waiting to be printed, the message box below will appear instead.

TRANSPORT MEMOS
No new transport memos found
OK

To print the transport memos, click on the 'transport' icon  (<u>T</u>ransport).

Once the memos have been printed, OPAS will enter today's date in the *Transport Booked:* field and the name of the person who printed them in the *By:* field.
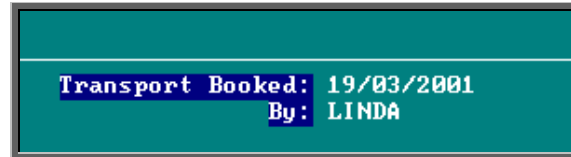


If you need to reprint a transport memo, find the relevant appointment and simply remove the date from the *Transport Booked:* field (using <u>E</u>dit, <u>U</u>pdate) and run the <u>T</u>ransport option again.

## Option 4. Printing from the patient screen

Menu: **Patients**

If you want to print one transport memo for a specific patient, find the patient and

click on the 'appointment' icon  (<u>A</u>ppointments, <u>C</u>urrent). (If you need to reprint a transport memo, simply remove the date from the *Transport Booked* field (using <u>E</u>dit, <u>U</u>pdate) first)

Now click on the 'letters' icon  (Letters).

To print the transport memo, click on the 'transport' icon  (<u>T</u>ransport).
Once the memos have been printed, OPAS will enter today's date in the *Transport Booked:* field and the name of the person who printed them in the *By:* field.
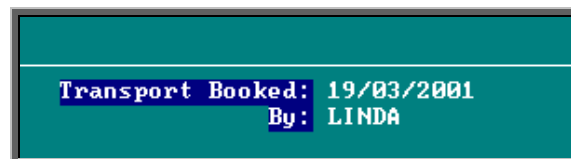
# 18.     Printing clinic lists

Clinic lists can be printed individually or in batch.  The layout of the clinic list can be customised to suit your requirements, but there is a standard report already created for you.

Option 1. Printing individual clinic lists.

Menu: **Appointments – Current – Sessions**

Find the session that you wish to print and click on the 'print' icon  (File, Print) and select **List** from the drop down menu.

You will be asked if you wish those patients expected to collect items to be printed at the bottom of the clinic list (i.e. those patients who appear on the session screen as they have been notified to collect items). This prompt can be switched on/off by going into **Utilities – Choices – System**.
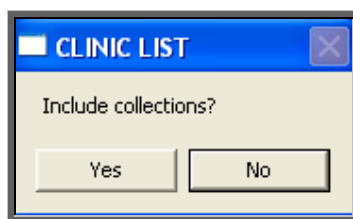


You can then select how many copies of the clinic list are required.  If you wish to abandon printing the clinic list select **0**.
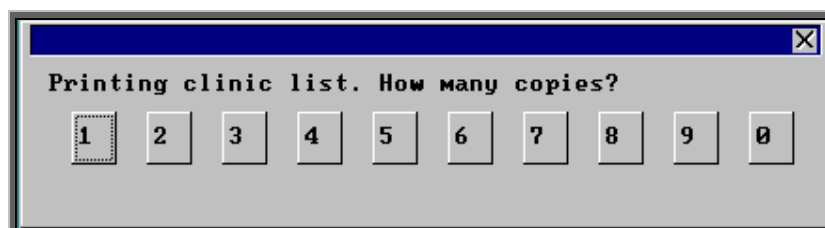


If required, you can then print Patient Demographics for each patient on the clinic list. Patient Demographics produces the same report as printing Patient Information from the **Patient** screen (*see Patients – Note 8. Printing Options*). This prompt can be switched on/off by going into **Utilities – Choices – System**.

**CLINIC LIST**

Print Patient Demographics?

| Yes | No |
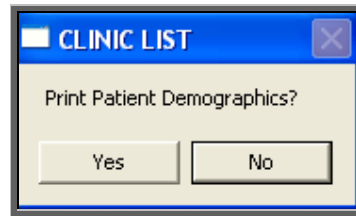
If Yes is selected to the Patient Demographics, you will then be asked if you would also like a printed list of each patient's orders also.

**Demographics**

? Include a list of orders for each patient also?

| Yes | No |
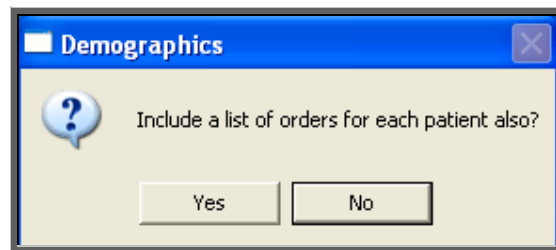
Note: When clinic lists are printed from the Session screen, a prompt appears to ascertain whether you would like to include collections.

A system parameter allows clinic lists to always include collections, to never include collections or to continue seeing the prompt so that you can choose each time the clinic list is printed.

Go to Utilities – Choices – System, and select the appropriate option in the *Collections printed on Clinic Lists?* field.
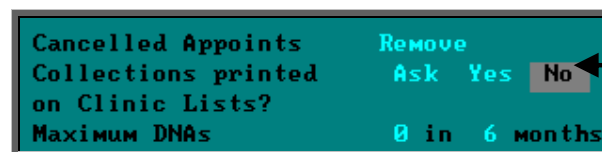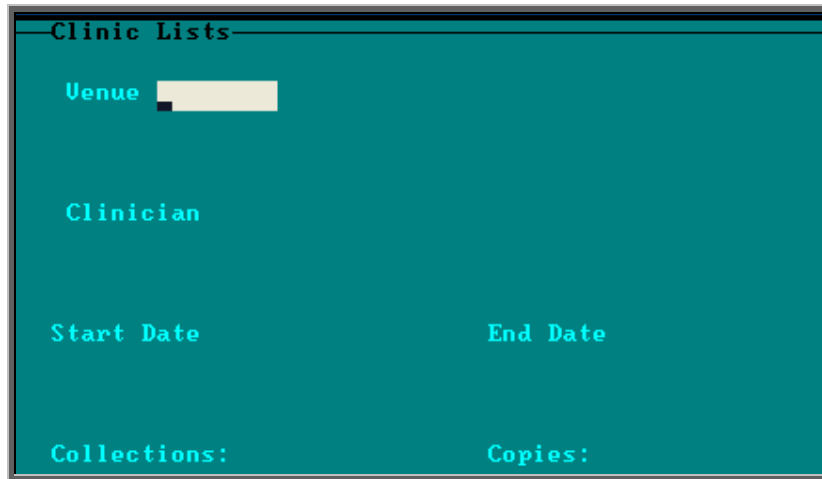
```
Cancelled Appoints        Remove
Collections printed        Ask  Yes  No
on Clinic Lists?
Maximum DNAs               0 in   6 months
```

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

Recalculate SYSDEF.UW each start up session?

| No | Yes |
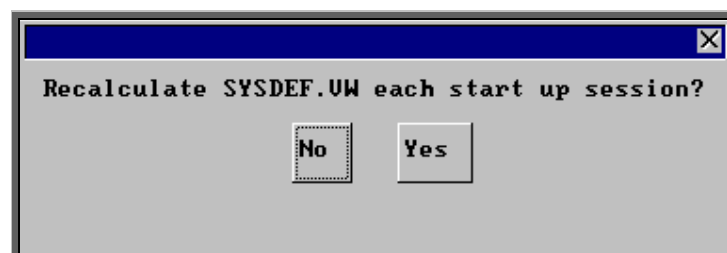
Press the **Enter** key.

Option 2. Printing clinic lists in batch

Menu: Appointments – Print – Clinic Lists



*Venue*        if you want to print clinic lists for all venues between the date ranges specified leave this field blank (by pressing the **Esc** key when the available options are offered), else make your selection.

*Clinician*    if you want to print clinic lists for all Clinicians between the date ranges specified leave this field blank (by pressing the **Esc** key when offered the available options), else make your selection.

*Start Date*   enter the start date for the range you wish to print

*End Date*     enter the end date for the range you wish to print

*Collections*  enter Y for including collections on the list and N for No

*Copies*       state how many copies of the clinic list you require
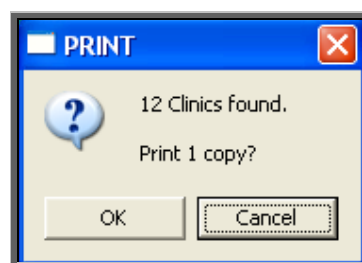
You will then be told how many sessions have been found within the date range and you will be asked to confirm that you wish to continue. Choose OK to continue and print the lists or choose Cancel to escape from the option.

Note: Using this facility will not give you the option to print patient demographics or order lists. That option is only available when printing single clinic lists from the Session screen.

# 19.    Updating appointment outcome/ logging attendance times

Once a clinic has finished, you have the ability to update the appointment to show whether the patient attended their appointment, and also to record what time they arrived and were seen.

## Option 1. Updating Appointment Outcome

Updating appointment outcome has two benefits. Firstly, it enables statistical information to be produced showing not only how many appointments occurred over a particular period, but also how many of those were attended.  Secondly, it enables OPAS to keep track of those people who are not attending their appointments, so that the information can be displayed on the Patient screen and also in the DNA screen where letters can be automatically generated (see Appointments – Note 24. Printing DNA letters).

Menu: Appointments – Current – Sessions

Find the session that is to be updated, and click on the 'maintain' icon (Maintain) from the options above the icons. You will now be able to see an appointment screen for each patient that has an appointment at that clinic.

Click on the option Log above the icons, and select Outcomes.

You will be taken straight into the *Outcome* field.  A pop-up list will appear for you to select from.

We have set four outcomes up for you to choose from; Attended, Did not Attend, Could not Attend and Cancelled by Hospital.  You can set up more options if necessary in Utilities – Choices – Appointment Outcome.

Make your selection and press **Enter**.  You will then be automatically taken to the *Outcome* field of the next patient with an appointment at that clinic. Make your selection again from the pop-up list.  Continue to do this until all the appointments have been logged.  Once the last appointment has been logged, you will be taken out of logging mode so that you can come out of the screen.  If you wish to stop logging before you reach the last patient, press **Esc** to remove the *Outcome* pop-up list and then click anywhere on the screen with the **right** mouse button and you will be taken out of logging mode.

Attended appointments

a)    links to the order

If you log an appointment with an outcome of Attended and there is an order linked to the appointment, you will be asked if you wish the *Supplied* field on the order be updated with today's date.



If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated

b)   links to the care episode

If the patient attended the appointment, and you have selected to update the order as goods supplied, OPAS will then look to see if the appointment/order is linked to a care episode. If it is, you will then be asked whether you would like to update the *Fitting:* field on the care episode.

You will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



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 the date of the appointment that has just been marked as Attended.

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.



c)    links to the *Event:* field (RTT)

If the appointment has an event in the *Event:* field that has an RTT (Referral to Treatment) action assigned against the attendance of the appointment, then the RTT table on the care episode will be updated.



d)    links to the waiting list

If the appointment is linked to the waiting list (Y in the *waitlist:* field), marking the appointment as attended will update the waiting list screen and remove the patient from the waiting list.

Non- attendance of an appointment

If you update an appointment with an outcome of Did not Attend or Could not Attend you will be asked if you would like to make a new appointment for the patient.  If you select Yes, OPAS will search for the next available appointment, looking at appointment dates 7 days before the original appointment or from tomorrows date (which ever is the later). You will be offered a new date/time that is for the Venue and Clinician that the original appointment was for.   If the appointment relates to an order where you specified the day the appointment needed to be on, then only appointments for that day will be offered.

a)    links to the DNA screen


When an appointment is updated with an outcome of Did not Attend, the date and time of the appointment will appear in a table in the bottom left corner of the Patient screen.



b)    links to the *Event:* field (RTT)


If the appointment has an event in the *Event:* field that has an RTT (Referral to Treatment) action assigned against the non-attendance of the appointment, then the RTT table on the care episode will be updated.
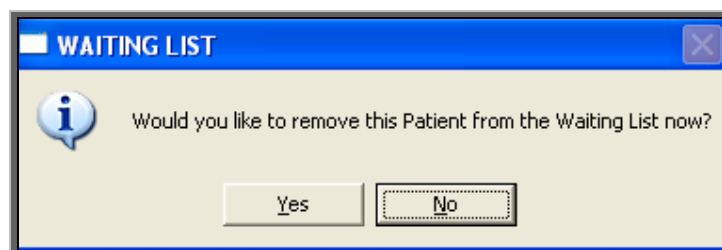


c)    links to the waiting list

If the appointment is linked to the waiting list (Y in the *waitlist:* field), the action carried on marking the appointment as DNA will depend on the option set in the system parameter screen.

Ask    If a an appointment that is linked to the waiting list is marked as
       Did Not Attend, and a further appointment is not made, you will
       be asked if you wish to remove the patient from the waiting list.



Yes    If a an appointment that is linked to the waiting list is marked as
       Did Not Attend, and a further appointment is not made, the patient
       will be removed from the waiting list.



## Option 2. Logging patient arrival/departure

Logging the time that the patient Arrived, was Seen and Departed, updates the
appointment with an outcome of Attended, but also enables the appointment data to be
analysed to see if your patients are being seen within half an hour of their appointment
time (re Patients Charter).

Menu: Appointments – Current – Sessions

Find the session that is to be updated, and click on the 'maintain' icon
(Maintain) from the options above the icons. You will now be able to see an
appointment screen for each patient that has an appointment at that clinic.

Click on the option Log above the icons.

Times can be logged individually as patients arrive, are seen and depart.  Or, alternatively, all three times can be logged at once if you are updating the appointments after the clinic has finished.

Arrived        select to enter the time the patient arrived for their appointment. The current time will appear at the bottom of the screen.  This can be amended if necessary, and press **Enter** to accept.

Seen           select to enter the time the patient was seen.  The current time will appear at the bottom of the screen.  This can be amended if necessary, and press **Enter** to accept.

Departed       select to enter the time the patient left.  The current time will appear at the bottom of the screen.  This can be amended if necessary, and press **Enter** to accept.

               Entering a Departed time will update the *Outcome* of the appointment to Attended.

All            select to enter all (more than one) of the times in one step.
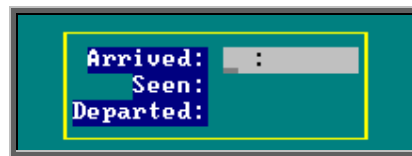


The cursor will move into the log box where you can enter the Arrived, Seen and Departed times. If you do not wish to enter a time in one of these fields, simply press the **Enter** key to move to the next field.

Once the Departed field has been entered, you will then be automatically taken to the next patient with an appointment at that clinic. Enter the times for the next patient and continue to do this until all the appointments have been updated.  Once the last appointment has been logged, you will be taken out of logging mode so that you can come out of the screen.  If you wish to stop logging before you get to the last patient, click anywhere on the screen with the **right** mouse button and you will be taken out of logging mode.

a)    links to the order

If you log an appointment with an outcome of Attended and there is an order linked to the appointment, you will be asked if you wish the *Supplied* field on the order be updated with today's date.

If the order linked to the appointment is a stock order, you will be asked if you wish the *Supplied* field on the order be updated with today's date **and** the stock control system be updated



b)   links to the care episode

If the patient attended the appointment, and you have selected to update the order as goods supplied, OPAS will then look to see if the appointment/order is linked to a care episode.  If it is, you will then be asked whether you would like to update the *Fitting:* field on the care episode.

You will be given one of the following two prompts, depending whether there is already a fitting date entered on the care episode.



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 the date of the appointment that has just been marked as Attended.

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.



c)    links to the *Event:* field (RTT)

If the appointment has an event in the *Event:* field that has an RTT (Referral to Treatment) action assigned against the attendance of the appointment, then the RTT table on the care episode will be updated.

d)    links to the waiting list

If the appointment is linked to the waiting list (Y in the *waitlist:* field),
marking the appointment as attended will update the waiting list screen and
remove the patient from the waiting list.

Removed: 12/06/2008          By LINDA

Reason: Attended Appointment

# 20.    Auditing appointments

On the appointment screen there is a field called *Event:*. There are two purposes for this
field.
One is is to catergorise the type of appointment and against each category allocate set
questions and possible responses to be completed after the patient has been seen. However,
it can also be used for assigning Referral to Treatment actions against the event (see Care
Episodes - Note 9.  18 Week Journey).

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

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

To use the *Event* field, you first have to set up the Events, Questions and Responses.
It is best to document what you want to set up before you begin entering them into OPAS
because the quickest way is to enter the Questions and Responses before entering the
Events.

1.   Setting up the Questions

Menu: Utiliites – Choices – Appointment – Questions

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

*Question*          type in the question

Continue until all the questions have been entered.

2.   Setting up the Responses

Menu: Utiliites – Choices – Appointment – Responses

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

*Response*          type in the reponse
*Score*             enter a score if appropriate (each response can carry a score
                    to indicate the level of satisfication of the answer)

Continue until all the reponses have been entered.


3.   Setting up the Events

Menu: Utiliites – Choices – Appointment – Events

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

*Event*             type in the event

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

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


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

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

Click on the word Questions above the icons.

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

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

## 4.   Using the Event field

When making an appointment, select the appropriate *Event* from the pop-up list.
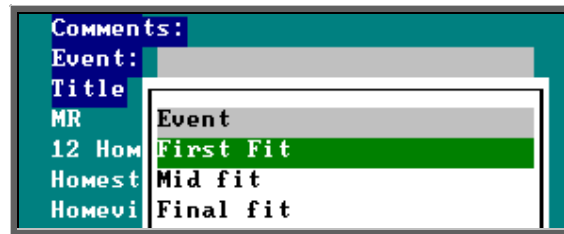


Once the patient has been seen, find the appointment and click on the word Audit above the icons and then select Create.
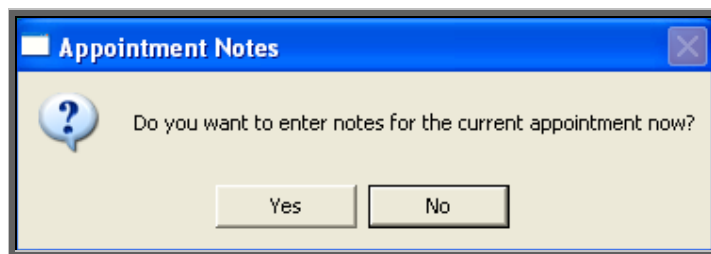


If you select Yes, the first question will appear.
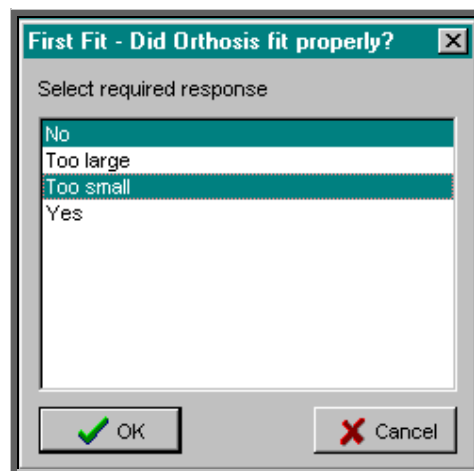


If, when the question was created (in step 2), multiple responses were allowed, you will be able to highlight more than one response before selecting OK to continue.

Each question will be put to you, in the order that they were created in the Event screen (see step 3).

The questions and the responses given can be viewed at anytime by finding the appointment and clicking on the word Audit above the icons and then selecting View.

# 21.    Archiving sessions

To keep the Appointment module of OPAS operating efficiently, it is necessary to regularly archive your old appointments.  Depending how many clinics you hold a week, and how fast your computer is will determine how regularly this needs to be done, but we recommend that sessions be archived at least on a monthly basis.  Once they are archived you can still see details of the appointments in the **Patients** record or in **Appointments – Archived**. Note: Some of the appointment reports require the appointments to be archived.

<span style="color:red">You must be the only user in OPAS when archiving sessions, so ensure everybody is logged off first.</span>    (**Utilities – Who** will tell you who is currently using OPAS)

> Menu:  **Appointments – Current – Sessions**

When you are asked the date of the session required press **Enter** as it does not matter which session you are in when the archive is run.  It also does not matter whether you are in the FULL or FAST version of the **Sessions** screen.

Once you are in the **Sessions** screen, click on the 'archive' icon (Appointments, Archive).

A calendar will appear in the middle of the screen for you to select the date you wish to archive up to. Yesterdays date will automatically be highlighted, but this can be changed to any date in the past.  (Sessions in the future cannot be archived.)  Click on OK to continue.
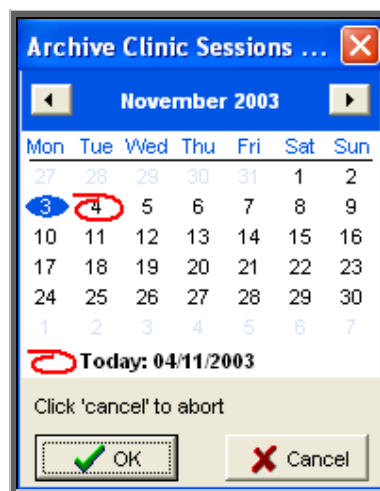
OPAS will now start to archive all the session and their associated appointments up to the date entered.  If this task is performed regularly it will only take a short while

(no longer than a couple of minutes).  When the archive is complete the icons at the top of the screen will reappear.

# 22.    Accessing archived appointments

Once sessions have been archived, those sessions are their associated appointments can still be seen by going into Appointments – Archived – Sessions and Appointments – Archived – Appointments.

a)    Printing clinic list for archived sessions

Menu: Appointments – Archived – Sessions.

Click on the 'find' icon ![find icon] (Data, Find), and select Date from the options at the top of the screen. Enter the date of the archived session you wish to print. Once you

have found the session, click on the 'print' icon ![print icon] (File, Print) and select List.

Although the archived session screen layout is different to the current session screen, the printed list can be the same.

b)    Looking at patients archived appointments

Menu: Patients

Use the 'find' icon ![find icon] (Data, Find), to find the relevant patient, and click on Appointments at the top of the screen and select Archived from the drop down menu.

Some patient templates include the archived appointments table (see Patients - Note 1. Introduction).

# 23.    Printing reminder letters

OPAS will keep a track on those appointments that were made more than 6 weeks in advance so that reminder letters can be sent nearer the appointment date.   This will hopefully reduce the number of patients that fail to attend review appointment because they either forgot or lost their original appointment letter.

Menu: Appointments – Print – Reminders

The Reminders screen will show you details of those appointments where 6 weeks have passed since the patient was sent their original appointment letter and it is now only 1-3 weeks away from the appointment date. (Contact the OPAS Helpdesk if you need to change these parameters)

To print the letters click on the 'auto-print' icon  (Auto-print).  This will then print all the letters that are eligible for printing. Just as there are 26 appointment letters, so there are 26 different reminder letters. If the patient was originally sent appointment letter A (LETTERA) they will be sent reminder letter A (REMINDA), appointment letter B (LETTERB) then reminder letter B (REMINDB) etc.

You will then be asked if you would like Transport memos to be reprinted for those appointments that require transport.
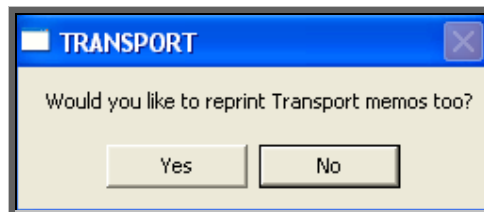


If you want to reprint the Transport memos, click on Yes, otherwise select No.

Once the letters are printed (and transport memos if requested), the *Reminder* field on the appointment will be populated with today's date so that you know when the letter was produced and to prevent the letter showing in the Reminders screen in future.
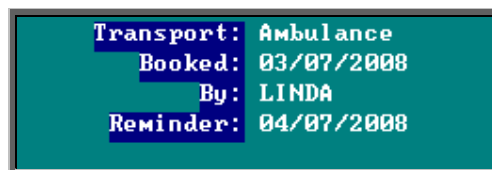


If you need to reprint an reminder letter, find the relevant appointment and simply remove the date from the *Reminder:* field (using Edit, Update). Then select Appointments – Print – Reminders and run Auto-print again.

If there are no reminders due to be sent, the following message will appear when the
Reminders option is selected.
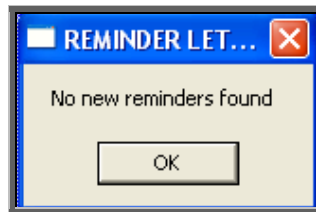


# 24.    Printing DNA letters

When a patient does not attend an appointment, you may wish to send a letter to the
patient, the referrer, and/or their GP.  OPAS has automated this process for you so that you
can quickly and easily send out pre-defined letters regarding DNA's.

a)    Setting up the system parameters for your requirements

Menu: Utilities – Choices – System

In the system parameters you need to tell OPAS

- how many DNA's a patient is allowed before a letter is sent

    and

- over what time scale

e.g. you may wish to send DNA letters if they DNA twice over a 3 month
period.  This would mean that if they DNA'd on the 1 Feb 2007 and then
again on 28 Apr 2007 they would not get a letter.  However, if they then
DNA'd again on 1 Nov 2007 they would get a letter.

Once you have decided on the ruling you want to apply to DNA letters move
down the system parameter screen and enter your criteria e.g. 1 in 3 months for
the above example.

b)    Setting up the DNA letters

Menu: Utilities – Choices – Letters

There are 3 different types of DNA letters available. For each type of DNA letter there are 26 templates. These may need to be amended to your required format/wording.

1)    DNA_CON          the letter for the referrer
2)    DNA_GP           the letter for the GP
3)    DNA_PAT          the letter for the patient

Find the first DNA letter that you wish to use. Note: the letters are listed in alphabetical order.

Once you have highlighted the relevant letter click on the 'paper and pencil' icon  (WP) to see the letter.  If you wish to edit the letter, click on the 'four coloured squares' icon  (Wordprocessor).   The data fields are already there, but you need to add your own wording of the letter.  (see Utilities – Note 15. Choices - Letters) on word processing functions)

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.
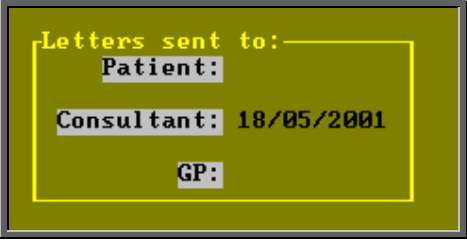
Follow the steps above to edit all the DNA letters you intend to use.

Note:  If you would rather, send the required letter layouts to the Helpdesk, and they will set them up for you.


c)    Printing the DNA letters in batch

Menu:  Appointments – Print – DNAs

This will show all the patients that have broken the DNA rule (using the criteria defined in the system parameters – see step (a) above). Some of these patients may already have had DNA letters sent.  The *Letters sent to* box would indicate if any letters have been produced, and when.
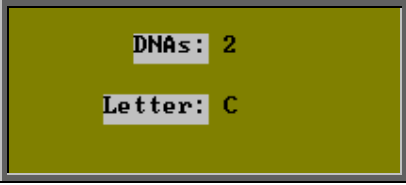
The patient who most recently broke the rule will be shown first. There will be one record for each patient regardless of how many DNAs they have. The appointment date and time will be of their most recent DNA and the DNAs: field will show how many DNAs they have had in your DNA period (using the criteria defined in the system parameters – see step (a) above).



Each DNA has a letter template associated to it. Which letter template is allocated can be set up in Utilities – Choices – Defaults (see Utilities – Note 6. Choices - Defaults). This gives you the ability to select different letter templates for different purchasers/clinics for example.

If you wish to change the letter template selected for a particular patient, find the DNA record for that patient and click on the 'letters' icon  (Letters). Then choose the appropriate letter template from the list at the bottom of the screen. The list of *Letter Types* will only contain those that you are eligible to print (see Utilities – Note 37. Users).

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


Select whom the DNA letter is to be
sent to.

You will then be asked if you want this letter to be printed for all those who
qualify for that DNA letter who have not had one sent yet, or just for the patient
you are looking at on the screen now.
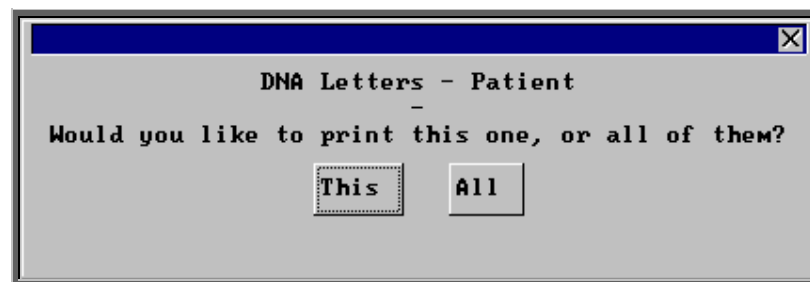
Select This or All as appropriate or press the **Esc** key if you wish to abandon
the option.


If All is selected, letters will only be produced if the letter hasn't been printed
already. If This is selected, the letter can be printed even if it has been printed
before.


When the letters are printed, a copy will also be printed for any carbon copy
recipient that is allocated against that patient (see Patients – Note 21.
Carbon Copies).


Once the DNA letters have been printed, today's date will be input next to
whomever the letter was sent to (i.e. patient, referrer etc) in the *Letters sent to:*
box.

d)   Printing individual DNA letters


Menu:  **Patient**


At the top of the screen click on <u>G</u>oto, and then <u>D</u>NAs.

This will show **all** the appointment that the patient did not attend, with the most recent first.


Each DNA has a letter template associated to it. Which letter template is allocated can be set up in **Utilities – Choices – Defaults** (*see Utilities – Note 6. Choices - Defaults*). This gives you the ability to select different letter templates for different purchasers for example.


If you wish to change the letter template selected, click on the 'letters' icon  (<u>L</u>etters). Then choose the appropriate letter template from the list at the bottom of the screen. The list of *Letter Types* will only contain those that you are eligible to print (*see Utilities – Note 37. Users*).




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

Select whom the DNA letter is to be sent to.




Once the DNA letters have been printed, today's date will be input next to whomever the letter was sent to (i.e. patient, referrer etc) in the *Letters sent to:* box.

Note: When the letters are printed, a copy will also be printed for any carbon copy recipient that is allocated against that patient (see Patients – Note 21. Carbon Copies).

# 25.    Diary

The Diary option allows you to see all appointments for all Clinicians on a given day and to make new appointments.  The Diary screen cannot be used for cancelling appointments or updating appointments.

Menu:  Appointments – Current – Diary

You will be asked which date in the diary you would like to go to. The date will default to today's date, but select an alternate date if required.
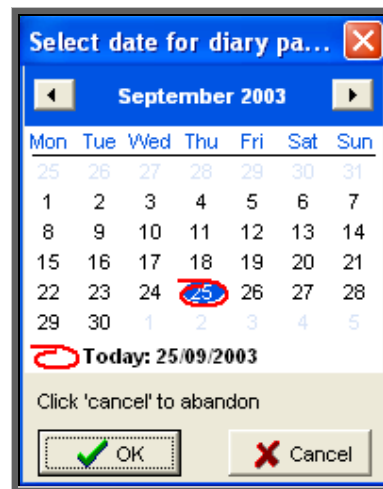
The diary page will be divided into intervals based on the default length of your appointments (as defined in your system parameters – see Utilities – Note 24. Choices - System).

If your system default is set to 15 minutes and you have made an appointment for a patient of 30 minutes, their name will appear twice i.e. on each 15 min slot that covers the 30 minute appointment.

```
11/09/2000 09:15 MR F BLOGGS
11/09/2000 09:30 MR K BLOGGS
11/09/2000 09:45
11/09/2000 10:00 MRS S NICHOLSON    MR F BL(
11/09/2000 10:15
11/09/2000 10:30 MISS T SMITH
11/09/2000 10:45                    MR J SMYTHE
11/09/2000 11:00 MR J KING
11/09/2000 11:15 MR J KING          MR J BROWN
11/09/2000 11:30 MISS J WREN
11/09/2000 11:45                    MISS J DUTTON
11/09/2000 12:00 MRS E BUTCHER
11/09/2000 12:15                    MR J DOE
11/09/2000 12:30
11/09/2000 12:45
11/09/2000 13:00
11/09/2000 13:15
```

Mr J King has a 30 minute appointment (11.00 – 11.30)

This feature gives you the ability to see at a glance where there are available appointments throughout the day.

To move to another diary date click on the 'arrow' icon [→] (Goto) and enter the new date.

To print the diary information for the day you have on screen, click on the 'print' icon [🖨] (File, Print).

```
Print 46 records

   Printer      File
```

You have the option to print the report or send to a file for exporting into Lotus 123 or MS Excel

Printer

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

File

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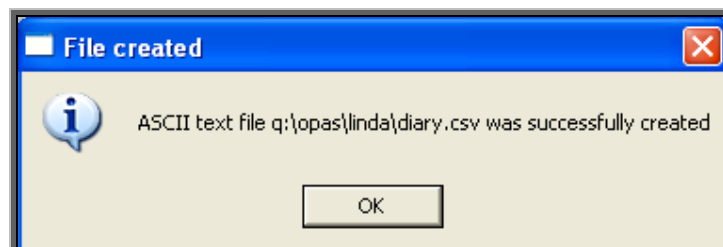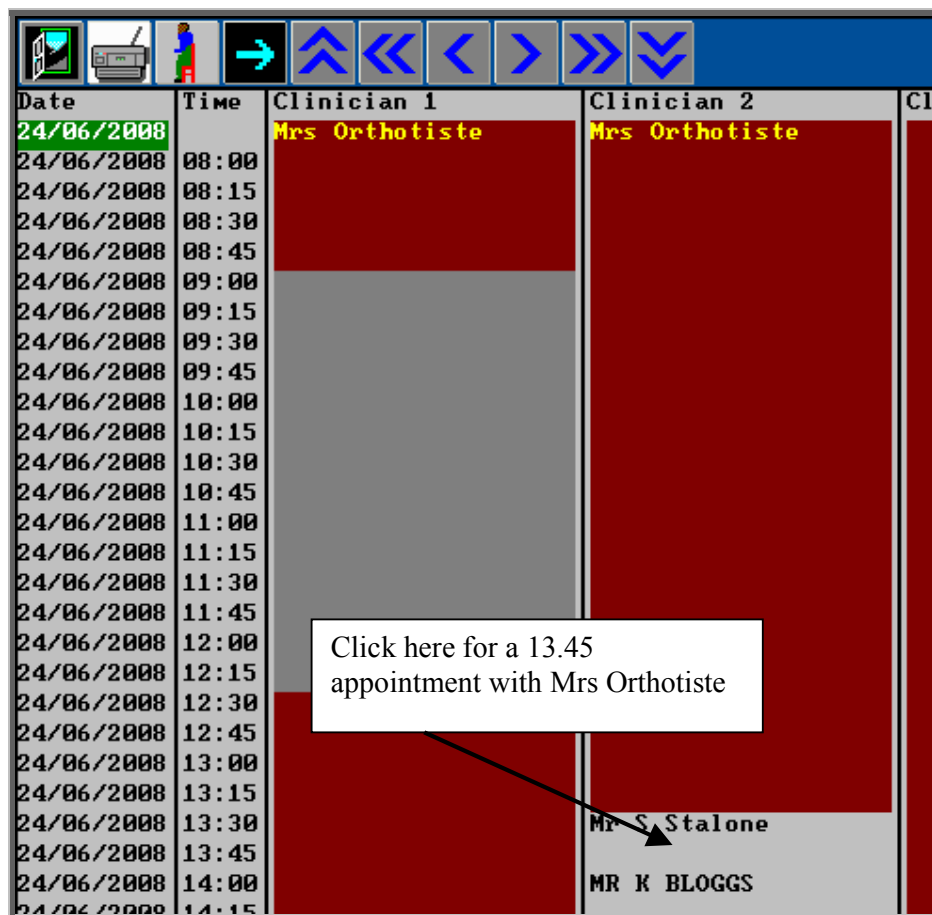
```
File created

(i) ASCII text file q:\opas\linda\diary.csv was successfully created

            OK
```

Making manual appointments via the Diary screen.

The Diary screen isn't as flexible as the Session screen, in that you can not make appointments outside the clinic times or double book appointment times. However, all sessions for the same day are shown on one screen, and it is easier to see availability.

The red area of the screen represents times outside the clinic hours, whereas the lighter grey area is available for making appointments. The darker grey area indicates that the session is blocked. Unlike making an appointment in the Session screen, you **can not** make appointments in the Diary screen that are outside the clinic hours.

To make an appointment, click on the 'appointment' icon [icon] (Appoint), and then click with the mouse by the slot you wish to take.



If you need to take more than one slot (i.e. a half hour appointment) click on the first slot as you will be able to change the length in the Appointment screen. The

following prompt will appear for you to confirm that you have selected the correct time, Clinician and Clinic. Click on **OK** to continue.



You will then be taken into the **Appointment** screen to fill out the details of the appointment. The fields below in red must be completed.  The other fields are optional.

*Duration*           will  default  to  your  standard  appointment  length  (as  set  up  in **Utilities – Choices – System)** but  can  be  changed  to  the length of appointment required

*Patient*            select the patient from the pop-up list

If  a  this  point,  you  discover  that  the  patient  hasn't  yet  been registered  on  OPAS  and  therefore  they  are  not  in  the  pop-up  list, press **Esc** and type **N** to abandon the appointment screen.



*Full*               enter **Y** if this is a fully booked appointment.  You can control what defaults  into  this  field  using  the  default  screen  (**Utilities – Choices – Defaults**)

*Partial*            enter **Y** if this is a partially booked appointment. NB. if you enter **Y** in the *Full* field, **N** will automatically default into the *Partial* field and visa versa

*Consref*            if the referrer entered on the patient record is not the referrer who referred the patient for this appointment, then an alternate referrer can be selected from the pop-up list (press **Tab** to show the pop-up list).

*Purchaser*          if the purchaser entered on the patient record is not the relevant purchaser for this appointment, then an alternate purchaser can be selected from the pop-up list (press **Tab** to show the pop-up list)

*Order*          if the appointment relates to an order that has been entered on OPAS, then the order number can be entered here.  If you know that there is an order, but cannot remember the order number, press the **Tab** key to see a pop-up list of all the orders.

| No | Hospital No |
|----|-------------|
| C00219 | ABC23456 |
| G00220 | ABC23456 |
| G00221 | 786756 |
| G00222 | AH280965 |
| G00223 | 776655 |
| G00224 | G54367 |

Move the green cursor into the Hospital No column and type in the patients Hospital number to show the order numbers for that patient.

*Notes*          enter the reason for the appointment here.  What is entered here can appear on the appointment letter to the patient so that they know what the appointment is for.

*Comments*       additional comments can be entered here.  These do not appear on appointment letters but can be printed on clinic lists.

*Event*          an event can be attached to an appointment. This gives the Clinician the opportunity to attach specific notes after he has seen the patient.  This is achieved by answering set questions that relate to the type of appointment. *(see Note 20 – Appointments – Auditing appointments*). The *Event* field can also be used for assigning RTT actions (see Care Episodes – Note 9. 18 Week Journey).

*Letter*         will default to your standard appointment letter type, but can be changed to any one of the 26 different letters that can set up in Utilities – Choices – Letters (see Utilities – Note 15. Choices - Letters)

*Advised*        it is this field that controls whether an appointment letter is printed. If you require an appointment letter to be printed, then leave this field blank.  If you do not want an appointment letter to be printed, then enter a date here (pressing **F2** will insert today's date for you).

*Episode*        if the appointment relates to a care episode that has been entered on OPAS, then the case number can be entered here.  If you know that

there is a care episode, but cannot remember the case number, press the **Tab** key to see a pop-up list of all the care episodes.



| Case: | Patient: |
|---|---|
| CE00016 | NXYZ0987654 |
| CE00017 | NM76543 |
| CE00022 | NA61848 |
| CE00023 | NMAN12345 |
| CE00025 | NTORUS007 |

Move the green cursor into the Patient: column and type in the patients Hospital number to show the care episodes for that patient.

*New*           enter Y if this is a new patient, or N if they have been seen before.

Alternatively select    S    for supply
                        F    for fit
                        R    for review
                        C    for cast

*Type*          enter either

                O    for an Out-patient
                I    for an In-patient
                W    for a Walk-in patient

(Note: When an appointment is created for a walk in patient, the *Outcome* field will automatically be marked as Attended)
          *Referral*          if this is a new referral, the date of the referral can be entered here.  This would then give you the ability to analyse how long it has taken from referral to appointment.

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



Earliest: 10:00:00
  Latest: 16:00:00

When making an appointment manually in the session screen, a warning message will appear if the time given to the patient does not agree with times entered in these fields.



Day: Monday
Time 09:30:00          Duration 15
Too early for this patient
Patient 12345QWERTY      New:      Type:

Day: Monday
Time 16:15:00          Duration 15
Too late for this patient
Patient 12345QWERTY      New:      Type:

Having been given the warning message, if you continue to make the appointment anyway, the message will dissapear when you have finished filling in the appointment details.

# 26.    Overview

Menu: Appointments – Current – Overview

This shows a week of clinics, with details of the Clinicians' clinic times and venues.



Use the cursor keys (**Right** & **Left**, **Up** & **Down**) to see further columns and rows.

When the Overview option is selected, the week shown will be the current week.

To see the following week, click on the 'plus' icon  (Week, Increase).

To see the previous week, click on the 'minus' icon  (Week, Decrease).

To go to a specific week, click on the 'goto' icon  (Week, Specific) and select the date from the calendar.
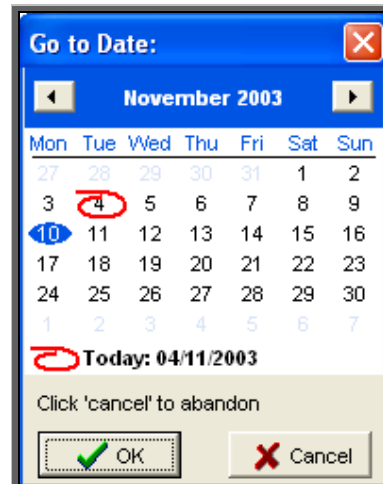
If a session that is showing in the overview is blocked, this will be highlighted with the BLOCKED banner by the side.



To print the overview for the week that you are looking at, click on the 'print' icon  (File, Print).

# 27.   Clinicians

Menu: Appointments – Clinicians

This option will present a screen for each Clinician showing when their sessions take place (in the *Sessions* table) and the specific dates and times of the clinic dates that have been created for them (in the *Clinics* table). To build clinic dates see Appointments – Note 3. Creating clinic dates.

Clicking on the 'clinics' icon  or (Clinics) will take you to the Sessions screen, where you will be able to access all clinic dates for that Clinician. You will be initially taken to the next session for the Clinician but you can move between clinic dates in the usual way.

# 28.     Reports – Ad hoc

Menu: Reports – Appointments – Ad hoc or

Menu: Appointments – Print – Reports – Ad hoc

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



### Appointments

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

Select Current           if the appointments you wish to analyse are current

### Venue

Select All               if all Venues are to be included

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

### Outcome

Select All               if all Outcomes are to be included

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

**Dates**

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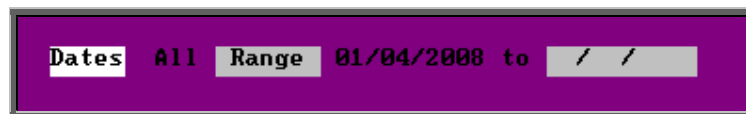
Select Range        if you want to report on a range of dates (this is the usual
                    practice e.g. a month, quarter or year). Use the space bar on
                    your keyboard to move the highlight from All to Range and
                    press **Enter**.

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



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



**Continue**

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

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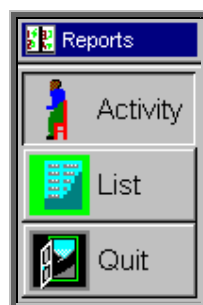


Once the appointments
that match your criteria
have been found, a new
Reports menu will
appear for you to make
further selections

---

## Activity

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

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

### Screen

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

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

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

### Printer

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

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

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

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

List

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

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

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

Screen

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

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

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

Printer

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

Below is an example of the List report in Detail.

```
clinicv              Patient      Date:        Time       Arrived:     Seen:

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

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

File

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

**File created**

ⓘ   ASCII text file q:\opas\linda\app_list.csv was successfully created

OK
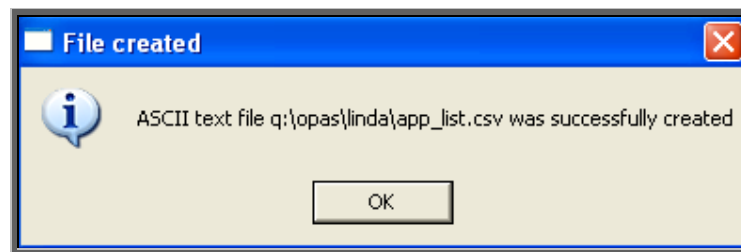
# 29.    Reports – Batches

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

1.    Bookings

This report interrogates the information entered in the booking fields.

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

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

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

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

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



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

Screen

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

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

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

Printer

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

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

| Date | New | Full | Partial | DNAs | HC | PC | F/Ups | Full | Partial | DNAs | HC | PC |
|------|-----|------|---------|------|----|----|-------|------|---------|------|----|----|
| 02/01/2003 | | | | | | | 1 | 1 | | | | |
| 16/01/2003 | | | | | | | 2 | 2 | | | | |
| 27/01/2003 | | | | | | | 1 | 1 | | | | |
| 29/01/2003 | | | | | | | 1 | 1 | | | | |
| 06/02/2003 | | | | | | | 2 | 2 | | 1 | | |
| 10/02/2003 | | | | | | | 1 | 1 | | | | |
| 24/02/2003 | 1 | 1 | | | | | 3 | 3 | | | 1 | |
| 25/02/2003 | | | | | | | 1 | 1 | | | | |
| 27/02/2003 | | | | | | | 2 | 1 | | | | |
| Total | 1 | 1 | 0 | 0 | 0 | 0 | 14 | 13 | 0 | 1 | 1 | 0 |

*New User NHS Trust*
*ORTHOTIC DEPARTMENT BOOKING PROGRAMME*

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

### File

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

**File created**

ⓘ ASCII text file q:\opas\linda\bo_appts.csv was successfully created

[ OK ]
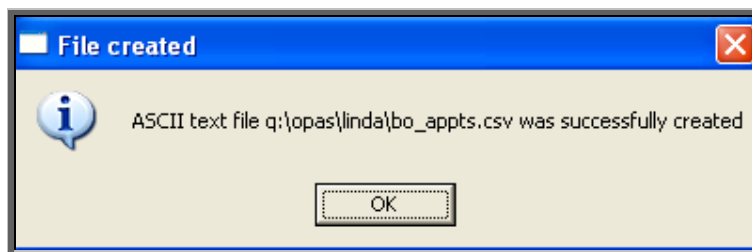
## 2.    New Patients

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

> Menu: **Reports – Appointments – Batches – New Patients**   or
>
> Menu: **Appointments – Print – Reports – Batches – New Patients**

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

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

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

- enter how the report is to be sorted By. Available options appearing in the pop-up box are Clinician, Directorate, Referrer or Venue



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

Screen

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

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.
Press **Esc** to abandon looking at the report on screen.  You will then have the option to re-select Screen, Printer or File.  Make another selection or press **Esc** again to return to the menu.

Printer

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

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

```
                              New Patient Appointments by Directorate
                                     01/01/2000 - 04/07/2008


                          Attended Attended Attended DNA       DNA      DNA
Directorate        Total  OP       IP       Other    OP        IP       Other

General              2     1

PCT                 51    25                 1        4

Trauma & Orthopaedic  1    1
```

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

File

A comma separated variable file will be created called

| | |
|---|---|
| **np_appc.csv** | if run by clinician |
| **np_appd.csv** | if run by directorate |
| **np_appr.csv** | if run by referrer |
| **np_appv.csv** | if run by venue |

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

**File created**

ASCII text file q:\opas\linda\np_appr.csv was successfully created

OK
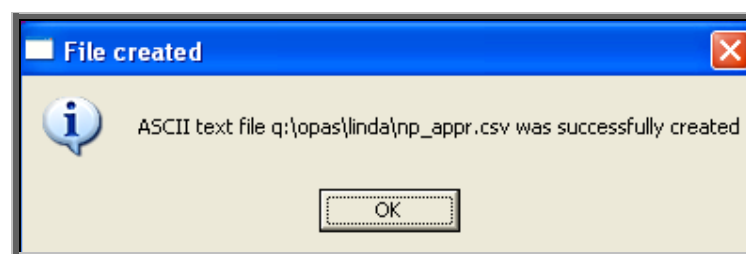
## 3. No Outcome

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

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

Menu: Reports – Appointments – Batches – No Outcome   or

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



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

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

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

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

- select whether the report period is for Archived or Current appointments



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

Screen

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

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

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

Printer

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

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

```
                        Appointments without Outcomes

Session    Date        Time:      Patient
_____

2846       29/11/2007  11:20      NG0825852
2846       29/11/2007  11:40      NG8904425
2846       29/11/2007  15:00      NG8404152
2846       29/11/2007  14:30      NG0606286
2846       29/11/2007  14:15      NG0819725
2846       29/11/2007  14:50      NG0606286
```

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

File

A comma separated variable file will be created called

        no_outa.csv         if run for archived appointments

        no_outc.csv         if run for current appointments

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

```
┌─────────────────────────────────────────────────────┐
│ ■ File created                                   ✕  │
├─────────────────────────────────────────────────────┤
│   (i)   ASCII text file q:\opas\linda\no_outa.csv was successfully created │
│                                                     │
│                      ┌──────────┐                   │
│                      │    OK    │                   │
│                      └──────────┘                   │
└─────────────────────────────────────────────────────┘
```

## 4.    Patient Charter Stats

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

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

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

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



- select how you wish the information to be displayed i.e. by Clinician, Purchaser or Venue

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

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



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

Screen

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

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

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


Printer

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


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

```
                    Patient Charter Statistics
                           By Clinician
                      01/01/2000 - 04/07/2008

Clinician                  Under 30   Under 60   Over 60     Late    Rejects

Mrs Orthotiste                 8          6          5         12        96
Mr Orthotist                  50         42         32         5        398
Ivor Ninkling                  1          3                    2         19
Andy Pandy                                                               8
Willie Gofar                                                             4
Euan Husami                                                              1
Mr B Fitter                    1                     2         1          2
A N Other                                                                1
Ben Dover                      2                                          5


                Total         62         51         39         74       454
```

| Number of patients seen within 30 minutes of their appointment time | Number of patients seen within 1 hour of their appointment time but not within 30 minutes | Number of patients seen after 1 hour of their appointment time | Number of patients who arrived late for their appointment | Those appointments that do not have 'seen' times logged |

File

A comma separated variable file will be created called

pcc_appt.csv          if run by clinician

pcp_appt.csv          if run by purchaser

pcv_appt.csv          if run by venue

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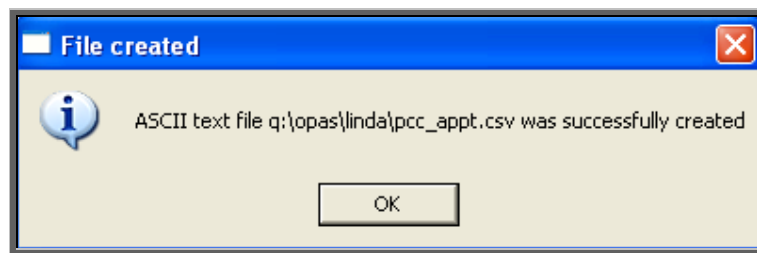


## 5.    PCT

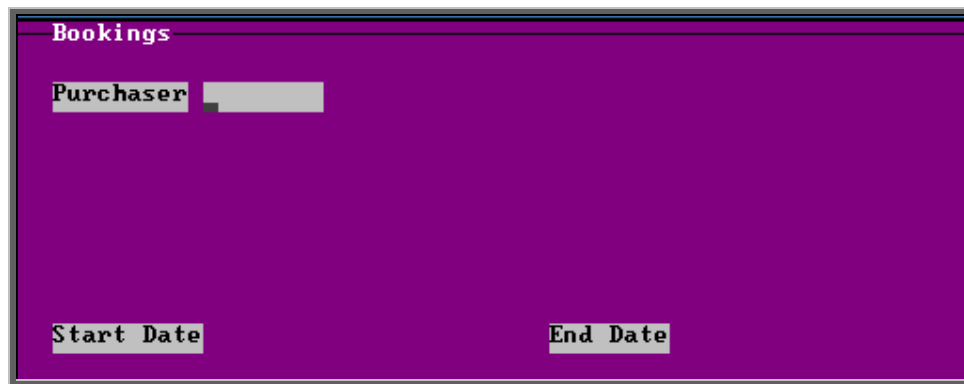This report will provide a breakdown of PCT activity.  An appointment report providing a summary of PCT activity is available in Reports – Appointments – Summaries.

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

Menu: Reports – Appointments – Batches – PCT   or

Menu: Appointments – Print – Reports – Batches – PCT

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

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

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

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

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

Screen

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

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

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

Printer

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

Below is an example of the PCT report.

```
                              PCT Appointment Activity
                                01/01/2007 - 30/11/2007

NHS No         Hospital No   Practice   PCT     Appt Date    Type   Consultant    Orthotist      Purchaser

               NTMP000010    J82199     5FE     15/02/2007   F      Mr Surgeon    Mr Orthotist   GP Fundholder
                                        Count 1

601-234-5674   TORUS44       L81045     5FL     08/10/2007   N      Mr Surgeon    Mr Orthotist   NHS TRUST
601-234-5674   TORUS44       L81045     5FL     15/02/2007   F      Mr Surgeon    Mr Orthotist   NHS TRUST
601-234-5674   TORUS44       L81045     5FL     15/02/2007          Mr Surgeon    Mr Orthotist   NHS TRUST
601-234-5674   TORUS44       L81045     5FL     19/02/2007   F      Mr Surgeon    Mr Orthotist   NHS TRUST
601-234-5674   TORUS44       L81045     5FL     12/04/2007          Mr Surgeon    Mr Orthotist   NHS TRUST
                                        Count 5


623-456-7894   N12345QWERTY  P92017     5HG     20/02/2007   F      Mr Surgeon    Mr Orthotist   NHS TRUST
623-456-7894   N12345QWERTY  P92017     5HG     15/02/2007   F      Mr Surgeon    Mr Orthotist   NHS TRUST
```

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

### File

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



File created

ASCII text file q:\opas\linda\pct_app.csv was successfully created

OK
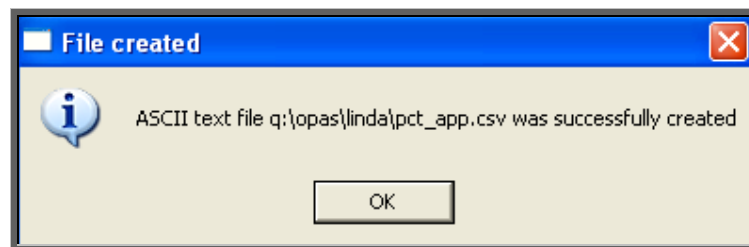

## 6.    Reviews

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

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

> Menu: Reports – Appointments – Batches – Reviews or

> Menu: Appointments – Print – Reports – Batches – Reviews

```
┌────────────────────────────────────────────────┐
│ Reviews                                          │
│                                                  │
│ Purchaser ▄                                       │
│                                                  │
│                                                  │
│                                                  │
│ Start Date                        End Date        │
│                                                  │
│                                                  │
│ By                                                │
└────────────────────────────────────────────────┘
```

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

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

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

- enter how the report is to be sorted By. Available options appearing in the pop-up box are Clinician, Directorate, Referrer or Venue

```
┌──────────────────────────────── ☒ ┐
│                                    │
│ Print 5 records                    │
│  ┌────────┐  ┌─────────┐ ┌──────┐  │
│  │ Screen │  │ Printer │ │ File │  │
│  └────────┘  └─────────┘ └──────┘  │
│                                    │
└────────────────────────────────────┘
```

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

Screen

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

If the report is too small to read, press the **F8** key to magnify. **F7** will make the text smaller again.
Press **Esc** to abandon looking at the report on screen.  You will then have the option to re-select Screen, Printer or File.  Make another selection or press **Esc** again to return to the menu.

Printer

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

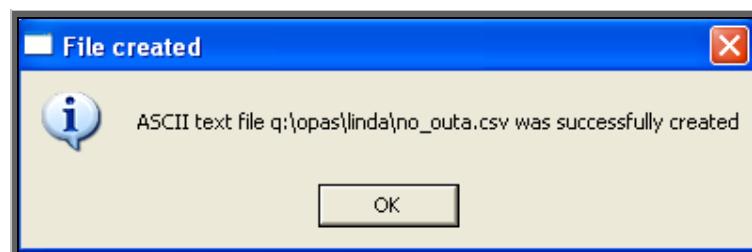Below is an example of the Review report selecting Direcorate.



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

File

A comma separated variable file will be created called

re_appc.csv     if run by clinician          re_appr.csv     if run by referrer

re_appd.csv     if run by directorate        re_appv.csv     if run by venue

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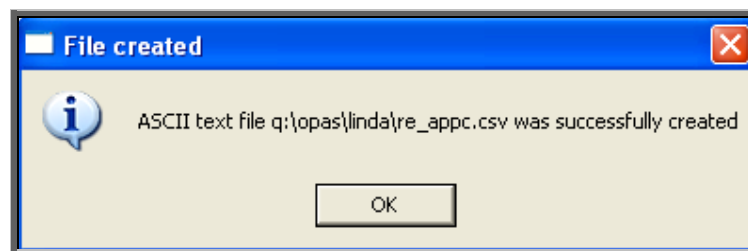


7.    Sessions

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

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

Menu: Reports – Appointments – Batches – Sessions   or

Menu: Appointments – Print – Reports – Batches – Sessions

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

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

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



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

Screen

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

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

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

Printer

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

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



```
                                    Sessions Report
                                      All Venues
                                 01/01/2007 - 01/12/2007

Venue                            Monday   Tuesday  Wednesday  Thursday   Friday   Weekend     All

Appliance Department               56       88        14        43        13                  214
MARTINS NOT SO SPECIAL CLINIC                 1         1                                        2


                                 _____ _____ _____  _____ _____  _____  _____
                  Grand Total       56       89        15        43        13         0       216
```

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

### File

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



**File created**

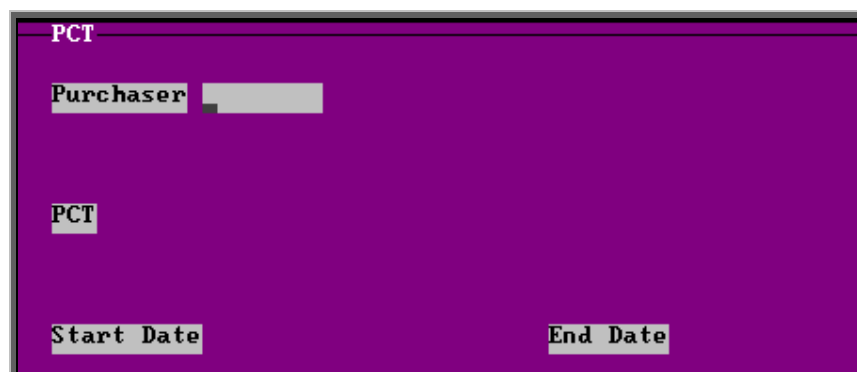ASCII text file q:\opas\linda\se_appts.csv was successfully created

OK
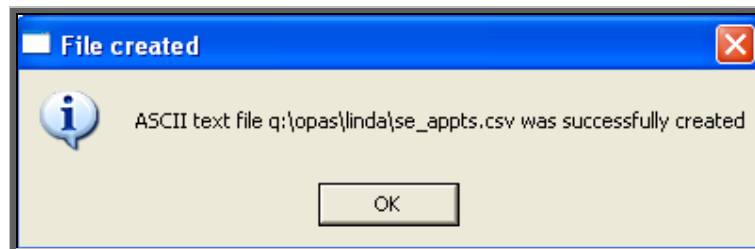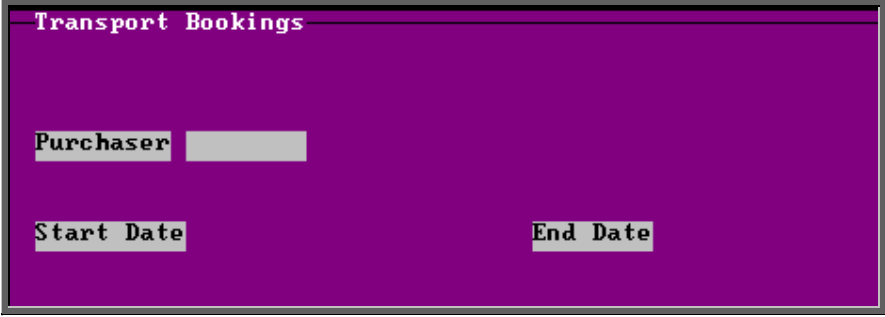
## 8.   Transport

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

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

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

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

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

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



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

Screen

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

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

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

Printer

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

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

```
                          Transport Bookings
                          1/9/2003 - 30/9/2003

Clinic                 Date       Time      Patient      Booked:      By

Appliance Department   29/09/2003 10:15:00  TEMP000010   25/09/2003  LINDA
```

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

### File

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

**File created**

ASCII text file q:\opas\linda\tr_appts.csv was successfully created

OK
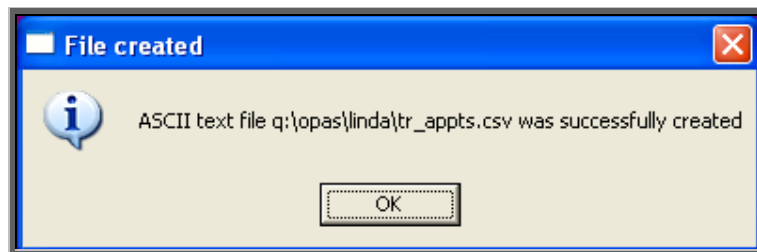
## 9.  Uncollected

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

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

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

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

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

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



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

Screen

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

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

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

Printer

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

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

```
                        New User NHS Trust
                        Unclaimed Collections
                      01/01/2002 to 27/04/2003

Clinic:              Hosp No      Patient Name        Received

Appliance Department  G0418296    J DAUNCEY           27/04/2003
New Clinic            G3355370    D EYRE              23/04/2003
```

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

File

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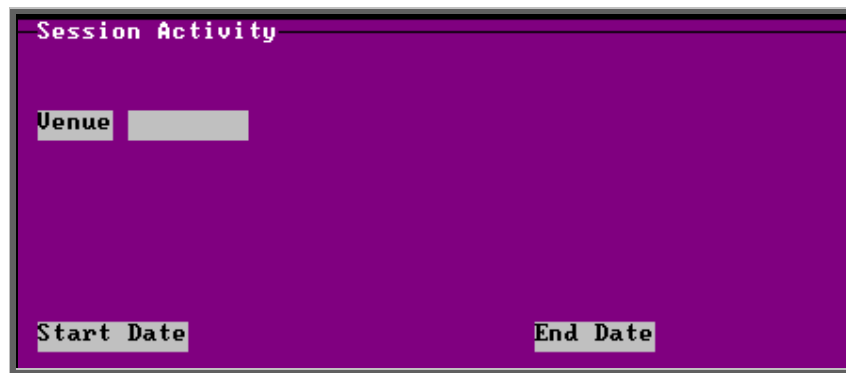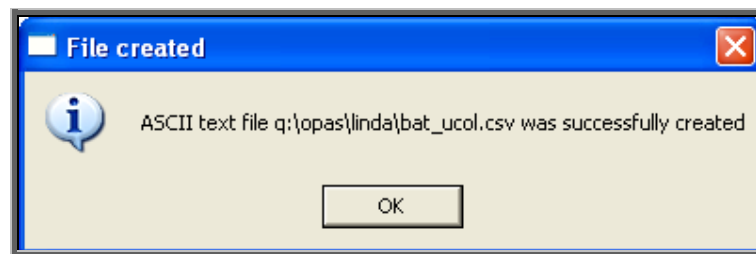


Once the report has been produced (either to the screen or printer), the Screen, Printer, File prompt appears again. Press **Esc** and the following prompt will appear.

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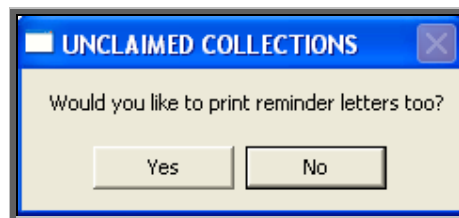


Click on Yes if you wish to print reminders letters for those patients who have not collected their goods.  Otherwise click on No.

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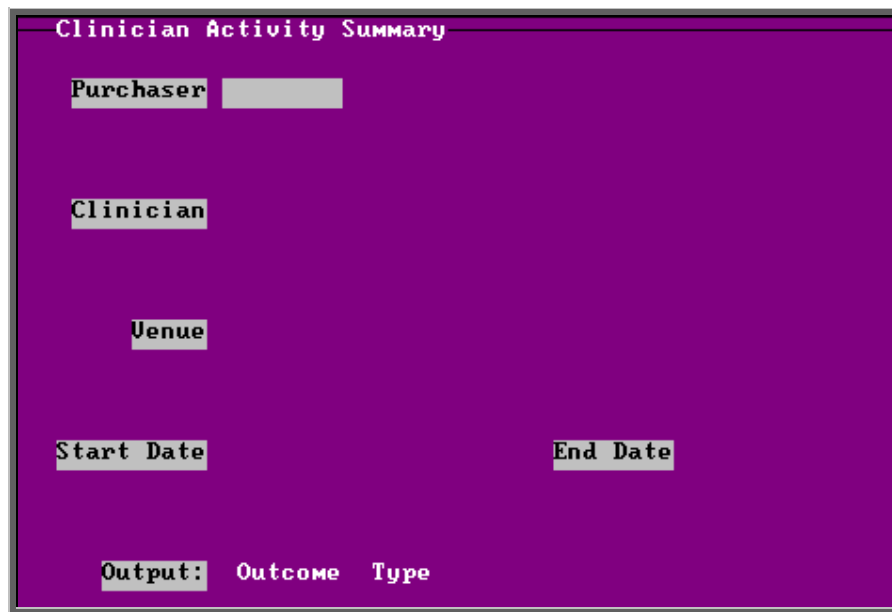
# 30.    Reports – Summaries

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

## 1.    Clinician

Menu: Reports – Appointments – Summaries – Clinician   or

Menu: Appointments – Print – Reports – Summaries – Clinician

```
┌──────────────────────────────────────────────┐
│ Clinician Activity Summary                     │
│  Purchaser      [        ]                      │
│                                                 │
│                                                 │
│   Clinician                                     │
│                                                 │
│                                                 │
│      Venue                                      │
│                                                 │
│                                                 │
│ Start Date                         End Date     │
│                                                 │
│    Output:  Outcome  Type                       │
└──────────────────────────────────────────────┘
```

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

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

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

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

- select whether the report should analyse by Outcome or Type



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

Screen

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

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

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

Printer

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

Below is an example of the Clinician report selecting Outcome.

```
New NHS Trust                                              0 - No Outcome recorded
Clinician Appointment Activity              Key:          1 - Attended
ALL PURCHASERS                                           2 - Did not Attend
ALL VENUES                                               3 - Could Not Attend
Start Date: 01/01/2000                                   4 - Collect Only
End Date: 04/07/2008                                     5 - Cancelled by Hospital
                                                         6 -
```

| Clinician | Total | Time | %age | 0 | 1 | 2 | 3 | 4 | 5 | 6 | Collect |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Ben Dover | 8 | 225 | 2.2% | | 8 | | | | | | |
| Mr B Fitter | 5 | 180 | 1.8% | | 5 | | | | | | |
| Willie Gofar | 4 | 60 | 0.6% | | 4 | | | | | | |
| Euan Husami | 1 | 15 | 0.1% | | 1 | | | | | | |
| Ivor Ninkling | 24 | 355 | 3.5% | 9 | 14 | | | | 1 | | |
| Mr Orthotist | 551 | 7240 | 72.3% | 136 | 312 | 24 | 42 | | 37 | | 28 |
| Mrs Orthotiste | 129 | 1800 | 18.0% | 45 | 63 | 9 | 2 | | 10 | | 23 |
| A N Other | 1 | 15 | 0.1% | | 1 | | | | | | |
| Andy Pandy | 8 | 120 | 1.2% | | 7 | 1 | | | | | 1 |
| **Grand Total** | 731 | 10010 | | 190 | 415 | 34 | 44 | 0 | 48 | 0 | 52 |
| Count | 9 | | | | | | | | | | |

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

```
Clinician Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008
```

| Clinician | Total | Time | %age | New | Review | Fit | Supply | Cast | Other | Ward | Walkins |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Ben Dover | 8 | 225 | 2.2% | | | | | | 5 | 2 | 1 |
| Mr B Fitter | 5 | 180 | 1.8% | 1 | | | | | 4 | | |
| Willie Gofar | 4 | 60 | 0.6% | 1 | | | | | 3 | | |
| Euan Husami | 1 | 15 | 0.1% | | | | | | 1 | | |
| Ivor Ninkling | 24 | 355 | 3.5% | 2 | | 4 | | | 17 | 1 | |
| Mr Orthotist | 551 | 7240 | 72.3% | 39 | 9 | 72 | 8 | 2 | 412 | 32 | 5 |
| Mrs Orthotiste | 129 | 1800 | 18.0% | 19 | 1 | 8 | | 2 | 117 | 5 | |
| A N Other | 1 | 15 | 0.1% | | | | | | 1 | | |
| Andy Pandy | 8 | 120 | 1.2% | | | 1 | | | 8 | | |
| **Grand Total** | 731 | 10010 | | 62 | 10 | 85 | 8 | 4 | 568 | 40 | 6 |
| Count | 9 | | | | | | | | | | |

### File

A comma separated variable file will be created called

**or_appts.csv**    if analysed by outcome

**ot_appts.csv**    if analysed by type

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

**File created**

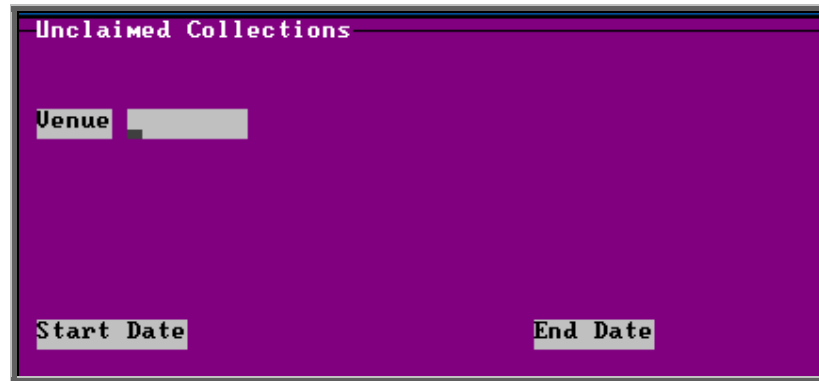ASCII text file q:\opas\linda\or_appts.csv was successfully created

OK
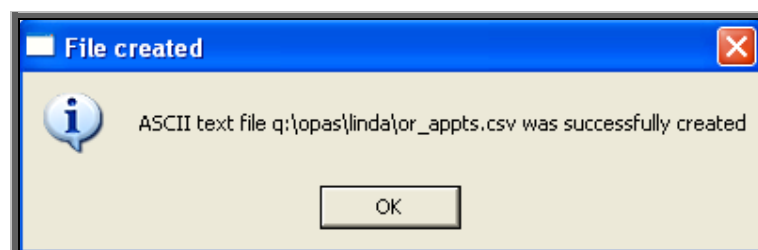
## 2. Directorate

Menu: Reports – Appointments – Summaries – Directorate   or

Menu: Appointments – Print – Reports – Summaries – Directorate



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

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

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

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

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

- select whether the report should analyse by Outcome or Type

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

Screen

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

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

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

Printer

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

Below is an example of the Directorate report selecting Outcome.



Below is an example of the Directorate report selecting Type

```
Directorate Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008


Directorate              Total    Time   %age    New    Review   Fit   Supply   Cast   Other   Ward   Walkins
                          62      655   6.5%     2      2       1      1       1     79              2
General                   22      295   2.9%     3      2       7      3             8
PCT                      635     8835  88.3%    56      6      74      3       3    474     40       4
Trauma & Orthopaedic      12      225   2.2%     1              3      1             7
                         ____    _____          ____   ____   ____   ____    ____  ____   ____    ____
             Grand Total  731    10010          62     10     85      8       4    568     40       6
                 Count  4
```

File

A comma separated variable file will be created called

di_appts.csv     if analysed by outcome

dt_appts.csv     if analysed by type

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

**File created**

ASCII text file q:\opas\linda\dt_appts.csv was successfully created

OK
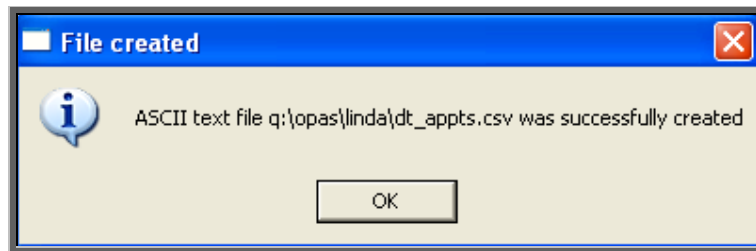
3.   GP Activity

Menu: Reports – Appointments – Summaries – GP Activity   or

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

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

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

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

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

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

- select whether the report should analyse by Outcome or Type



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

Screen

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

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

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

Printer

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

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

```
New User NHS Trust                                          0 - No Outcome recorded
GP Appointment Activity Report               Key :         1 - Attended
ALL PURCHASERS                                             2 - Did not Attend
Start Date : 01/01/2001                                    3 - Could Not Attend
End Date : 30/07/2003                                      4 - Collect Only
                                                           5 - Cancelled by Hospital
                                                           6 -


GP Code   GP Name            Total   Time    0    1    2    3    4    5    6    Collect

                             95      1650         92   3
G0230753  BENNET RB          1       15          1
G2313537  WOOLAS KD          6       90          6
G3291821  LIEBERT IJ         24      350         24                           2
G3305708  BRACE CA           1       15          1
G3316902  HUSSAIN S          1       15          1
G3355370  EYRE DH            1       30          1                            3
G3399279  WORTHINGTON JRM    1       15          1
G3399420  PENRICE GJ         1       15          1
G3408120  DONALDSON TJ       1       15          1
G8102216  MAITI SK           3       45          3
G8203801  JONES IP           4       60          4
G8409872  SCHUMM BA          2       20          2
G8510251  PERKINS PJ         1       15          1
G8706074  DAVIDSON RG        7       120         7
G8800576  FLAXMAN PA         1       15          1
G8901446  YOUNG S            16      240         14   1    1
```

Below is an example of the GP Activity report selecting Type

```
New NHS Trust
GP Appointment Activity
ALL PURCHASERS
ALL PCTS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008


GP Ref                    Total    Time    %age    New   Review   Fit   Supply   Cast   Other   Ward   Walkins

                          241     3635    36.3%    22      5      15     3       2      208            6
G0102005  ALLEN EB          1       15     0.1%                                         4
G0102926  ANDERSON MG       2       30     0.3%                          1              1
G0107725  ALEXANDER PJ      8       30     0.3%                                         6      2
G0110134  ALLEN J P         1       15     0.1%                                         1
G0218616  BROOKES M         2       45     0.4%     1             1                     4
G0230753  BENNET RB         2       15     0.1%                                         2
```

File

A comma separated variable file will be created called

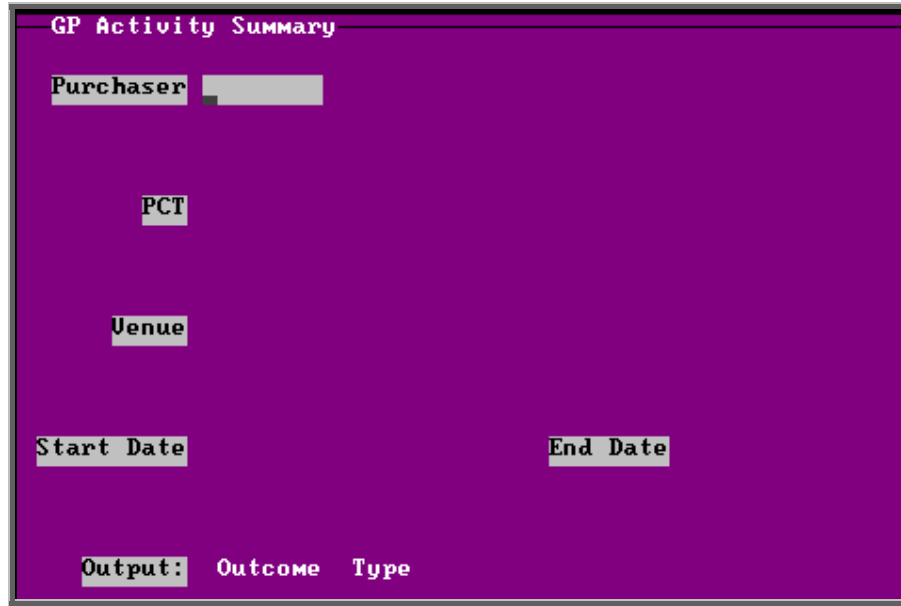gp_appts.csv    if analysed by outcome

gt_appts.csv    if analysed by type

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

**File created**

ASCII text file q:\opas\linda\gt_appts.csv was successfully created

OK
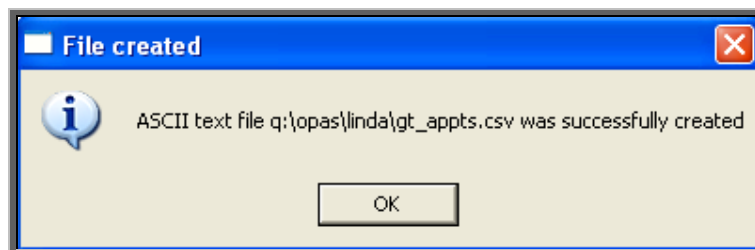
4. PCT

Menu: Reports – Appointments – Summaries – PCT   or

Menu: Appointments – Print – Reports – Summaries – PCT

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

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

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

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

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

- select whether the report should analyse by Outcome or Type



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

Screen

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

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

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

Printer

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

Below is an example of the PCT report selecting Outcome.

```
New NHS Trust                                   Key:  0 - No Outcome recorded
PCT Appointment Activity                              1 - Attended
ALL PURCHASERS                                        2 - Did not Attend
ALL PCTS                                              3 - Could Not Attend
ALL VENUES                                            4 - Collect Only
Start Date: 01/01/2000                                5 - Cancelled by Hospital
End Date: 04/07/2008                                  6 -


PCT                          Total    Time    %age    0      1     2     3     4     5     6    Collect

                              280     4045    40.4%    79    161   12    13               15            23
5A8   GREENWICH TEACHING PCT    2       15     0.1%     2                                                 1
5EM   NOTTINGHAM CITY PCT       1       15     0.1%     1
5FE   PORTSMOUTH CITY TEACHING PCT  1   15     0.1%     1                                                 1
5FL   BATH AND NORTH EAST SOMERSET PCT  35  650  6.5%  11    15     3     3           3
```

Below is an example of the PCT report selecting Type

```
New NHS Trust
PCT Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008


PCT                          Total    Time    %age    New    Review   Fit   Supply   Cast   Other   Ward

                              280     4045    40.4%    25      5      16      4       2     242      3
5A8   GREENWICH TEACHING PCT    2       15     0.1%     1              1                       1
5EM   NOTTINGHAM CITY PCT       1       15     0.1%                                            1
5FE   PORTSMOUTH CITY TEACHING PCT  1   15     0.1%             1                      1       1
5FL   BATH AND NORTH EAST SOMERSET  35  650    6.5%     7              4                      23      1
```

File

A comma separated variable file will be created called

> pc_appts.csv     if analysed by outcome

> pt_appts.csv     if analysed by type

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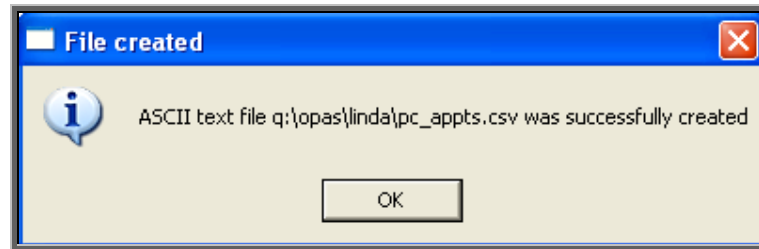
## 5.    Referrers

Menu: Reports – Appointments – Summaries – Referrers   or

Menu: Appointments – Print – Reports – Summaries – Referrers



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

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

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

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

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

- select whether the report should analyse by Outcome or Type



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

Screen

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

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

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

Printer

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

Below is an example of the Referrer report selecting Outcome.

New NHS Trust
Referrer Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008

Key: 0 - No Outcome recorded
1 - Attended
2 - Did not Attend
3 - Could Not Attend
4 - Collect Only
5 - Cancelled by Hospital
6 -

| Referrer | Total | Time | %age | 0 | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|---|---|---|---|
|  | 60 | 640 | 6.4% | 34 | 5 | 9 | 5 |  | 7 |
| A N Other | 29 | 430 | 4.3% | 19 | 5 | 3 | 1 |  | 1 |
| Direct Access GP | 15 | 225 | 2.2% | 11 | 3 | 1 |  |  |  |
| Mr Bloggs | 2 | 15 | 0.1% | 1 |  |  |  |  | 1 |
| Mr N Parrish | 4 | 40 | 0.4% |  | 3 |  | 1 |  |  |
| mr smith | 5 | 90 | 0.9% |  | 5 |  |  |  |  |
| Mr Surgeon | 616 | 8570 | 85.6% | 125 | 394 | 21 | 37 |  | 39 |
| Grand Total | 731 | 10010 |  | 190 | 415 | 34 | 44 | 0 | 48 |
| Count 7 |  |  |  |  |  |  |  |  |  |

Below is an example of the Referrer report selecting Type

```
New NHS Trust
Referrer Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008


Referrer                       Total      Time     %age      New    Review      Fit    Supply     Cast

                                  60       640     6.4%        1         2        1         1        1
A N Other                         29       430     4.3%        3         2       10         4
Direct Access GP                  15       225     2.2%        2         2        4
Mr Bloggs                          2        15     0.1%        1
Mr N Parrish                       4        40     0.4%
mr smith                           5        90     0.9%        1
Mr Surgeon                       616      8570    85.6%       54         4       70         3        3


           Grand Total          731     10010               62        10       85         8        4

               Count  7
```

File

A comma separated variable file will be created called

       co_appts.csv     if analysed by outcome

       ct_appts.csv     if analysed by type

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

**File created**

ASCII text file q:\opas\linda\co_appts.csv was successfully created

OK
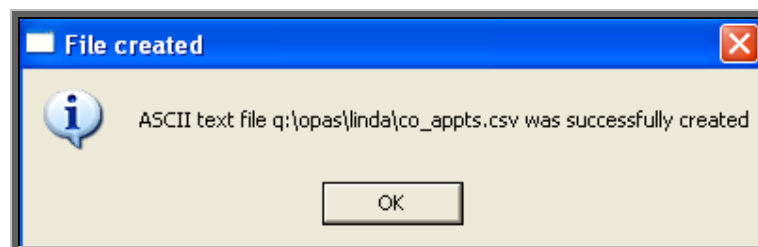
6.   Venues

Menu: Reports – Appointments – Summaries – Venues   or

Menu: Appointments – Print – Reports – Summaries – Venues

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

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

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

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

- select whether the report should analyse by Outcome or Type



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

Screen

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

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

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

Printer

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

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

```
New NHS Trust                                                      0 - No Outcome recorded
Venues Appointment Activity                        Key:          1 - Attended
ALL PURCHASERS                                                   2 - Did not Attend
Start Date: 01/01/2000                                          3 - Could Not Attend
End Date: 04/07/2008                                            4 - Collect Only
                                                                5 - Cancelled by Hospital
                                                                6 -


Venue                          Total      Time    %age    0        1        2        3

A N Other Clinic                   5        90    0.9%     3        1        1
Diabetic Foot Clinic               3        60    0.6%     1        1        1
LINDAS SPECIAL CLINIC             11       165    1.6%             11
MARTINS NOT SO SPECIAL CLINIC      1        10    0.1%              1
New Clinic                        30       630    6.3%     4       22        3        1
Orthotic Clinic                  648      8355   83.5%   182      348       27       43
Test                               7       100    1.0%              6        1
TEST AREA                         11       165    1.6%             11
testing                           14       420    4.2%             13        1
Yet Another Test                   1        15    0.1%              1


                 Grand Total      731     10010           190      415       34       44

                 Count  10
```

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

```
New NHS Trust
Venue Appointment Activity
ALL PURCHASERS
ALL VENUES
Start Date: 01/01/2000
End Date: 04/07/2008



Directorate              Total    Time    %age    New    Review    Fit   Supply    Cast    Other

A N Other Clinic             5      90    0.9%             1                                    4
Diabetic Foot Clinic         3      60    0.6%                                                 3
LINDAS SPECIAL CLINIC       11     165    1.6%      1                                         10
MARTINS NOT SO SPECIAL CLINIC 1     10    0.1%                                                 1
New Clinic                  30     630    6.3%      4       2                                 27
Orthotic Clinic            648    8355   83.5%     55       7       85        7       4      494
Test                         7     100    1.0%                                                 7
TEST AREA                   11     165    1.6%      1                         1               11
testing                     14     420    4.2%      1                                        10
Yet Another Test             1      15    0.1%                                                 1


           Grand Total      731   10010            62      10       85        8       4      568

           Count  10
```

File

A comma separated variable file will be created called

ve_appts.csv     if analysed by outcome

vt_appts.csv     if analysed by type

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