

Over Surgery

RECEPTION SYSTEM

User Guide
Version 1.0

AJJ Software Solutions

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SECURITY IS A PRIORITY

Remember to log out of the system when not using and at the end of the day

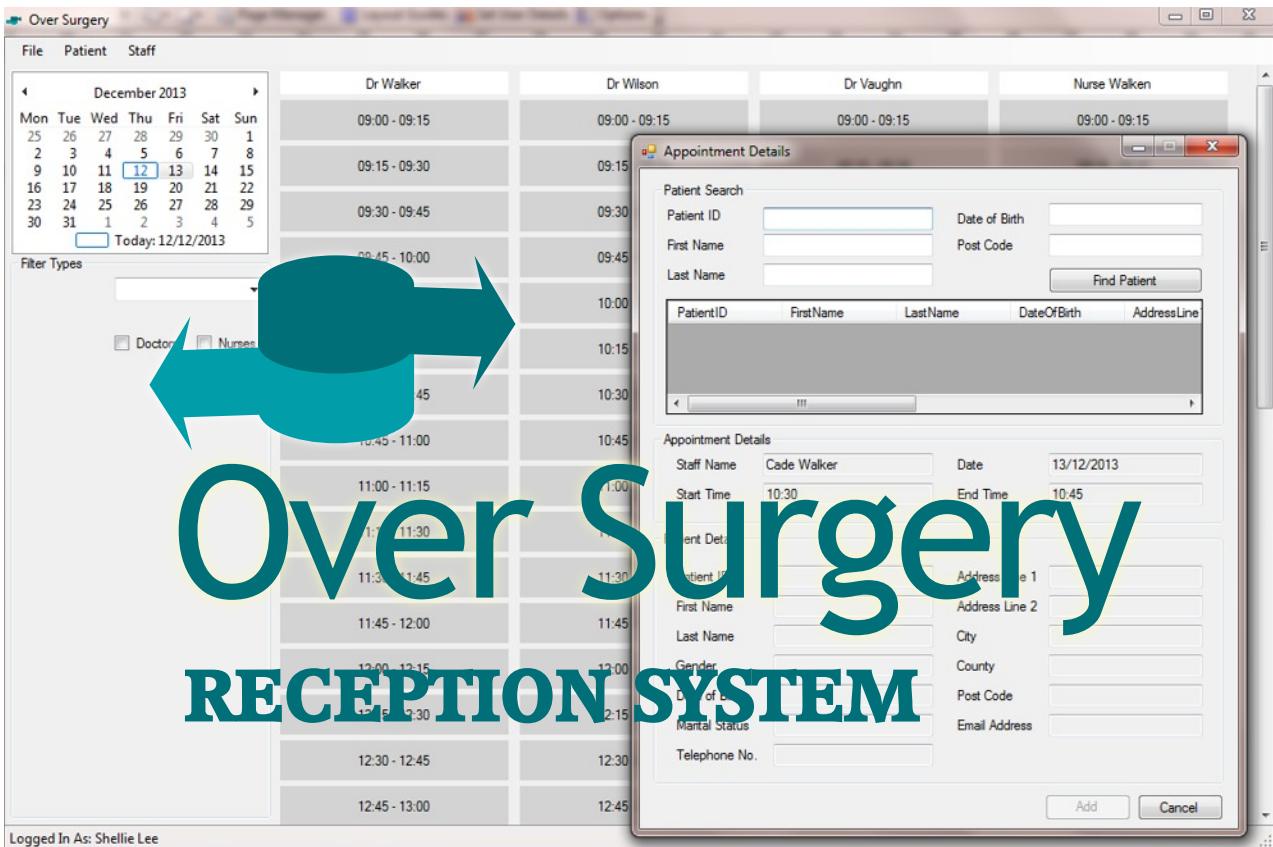
1 Introduction

This user guide is for use by all system users and it provides a step by step approach on how to use different functions of the system. Some features will or will not be available depending upon the role of the staff member. This guide provides help and guidance to the main features, some of which can be accessed in more than one way.

Assumptions are made that users have only a very limited knowledge of using computers and are able to follow basic instructions provided by the user guide. Screenshots of stages will be provided where necessary. Any directions for input will be further highlighted with a green arrow and green text. Pay attention to any notes or underlined text.

This guide will only provide basic troubleshooting, beyond that any system issues or bugs should be reported using the reporting procedures at the end of this guide

Users will use the system to maintain the reception booking system for patients. All users are required to login to the system to be able to use any of the functions. All new users will require registration as a user and will be provided with a user guide.



Over Surgery RECEPTION SYSTEM

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2 Login and logout

All users must log in to use the system using their staff ID and Password. When no longer using the system they must logout at the end of the day or when leaving the computer alone.

Step 1 - Select the Over Surgery logo to open up the login screen

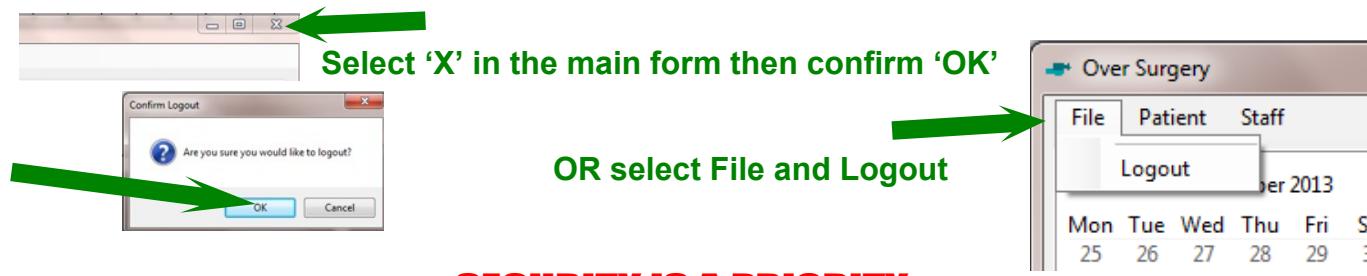
Step 2 - Enter staff ID and Password in the relevant boxes and then select login



Once logged in depending upon the users role and access authority will be presented with a main form. For receptionist form A and for doctors and nurses form B

To logout

To logout the user simply selects the cross ('X') in the top right-hand corner of the form and then confirms they want to logout by selecting 'OK' from the pop up box. Or choose **File** and **Logout**.



Remember to log out of the system when not using and at the end of the day

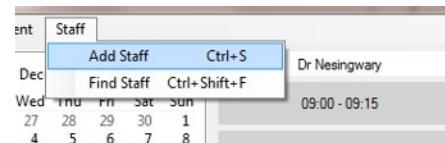
3 Add new staff to the system

Only authorised users/managers will be able to use this function of the system. Users that are not authorised will not have this feature activated automatically.

Step 1 - Select at the top left of the form **Staff** then **Add Staff** (shortcut Ctrl + S)

Step 2 - A new box will appear. The details of the new staff member should be completed fully and a **manual note made of the user ID and automated password**.

The new user will then log on using this password just once and reset the password to something secure and unique to them.

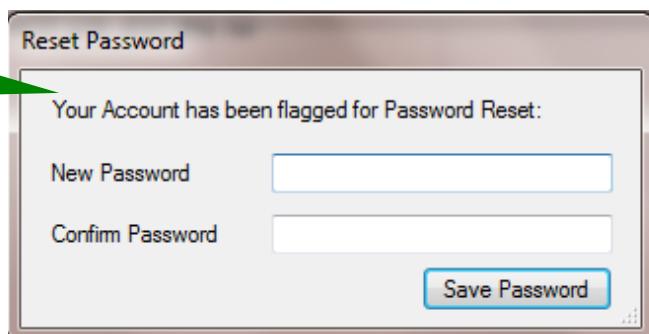


Step 3 - Select the 'Add Staff' button. A message box will confirm the new staff member has been added.

SECURITY NOTE

The new staff member should now be encouraged to log in using their new user ID and password.

Step 4 - When the staff member tries to log in they will be asked to reset their password and confirm it. Once completed and the 'save password' button pressed a confirmation message box will appear.



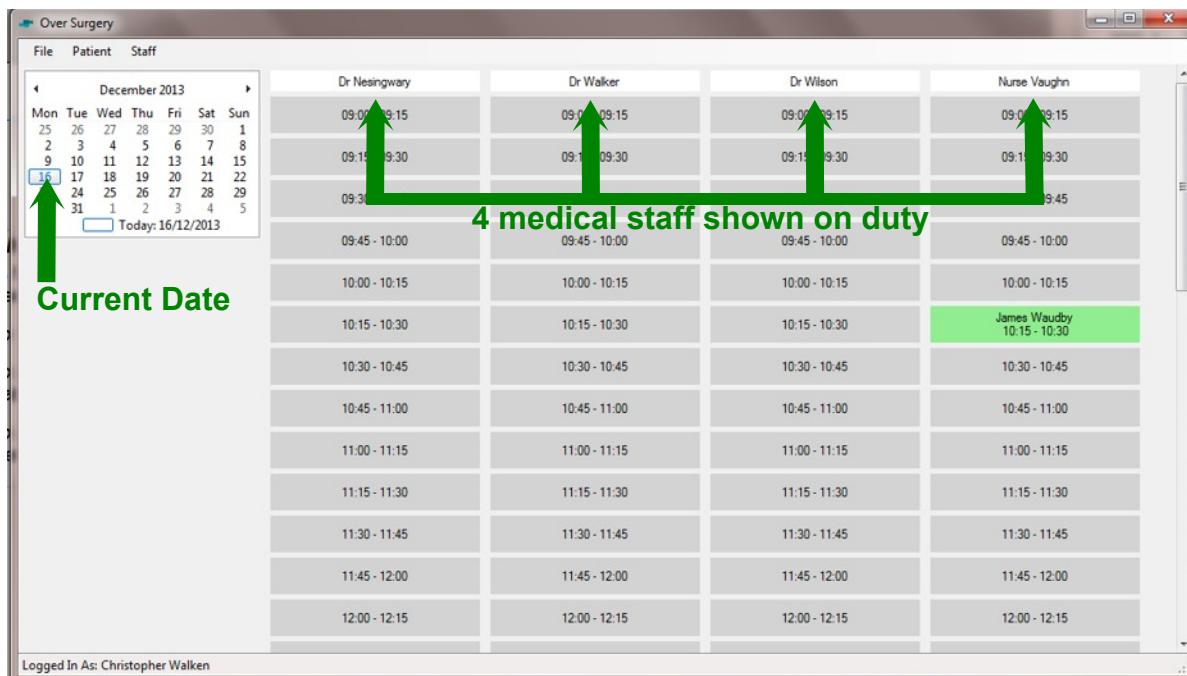
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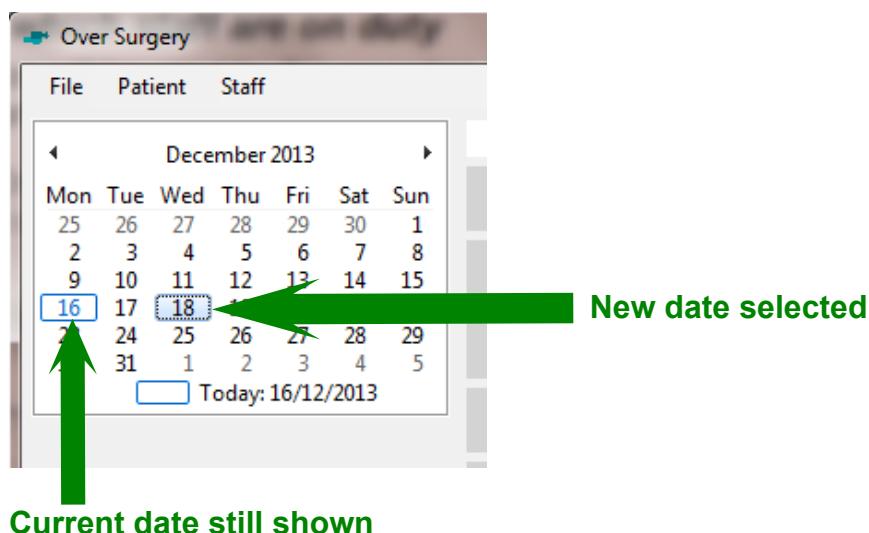
4 Check which staff are on duty

This function will be used by the reception staff when making appointments when patients request to see a particular member of the medical team.

Step 1 - Once logged on the reception staff will see a screen like the one below. This defaults to the current date and shows the medical staff of duty for that day.



Step 2 - To view the medical staff on duty for another date, select a date on the calendar.



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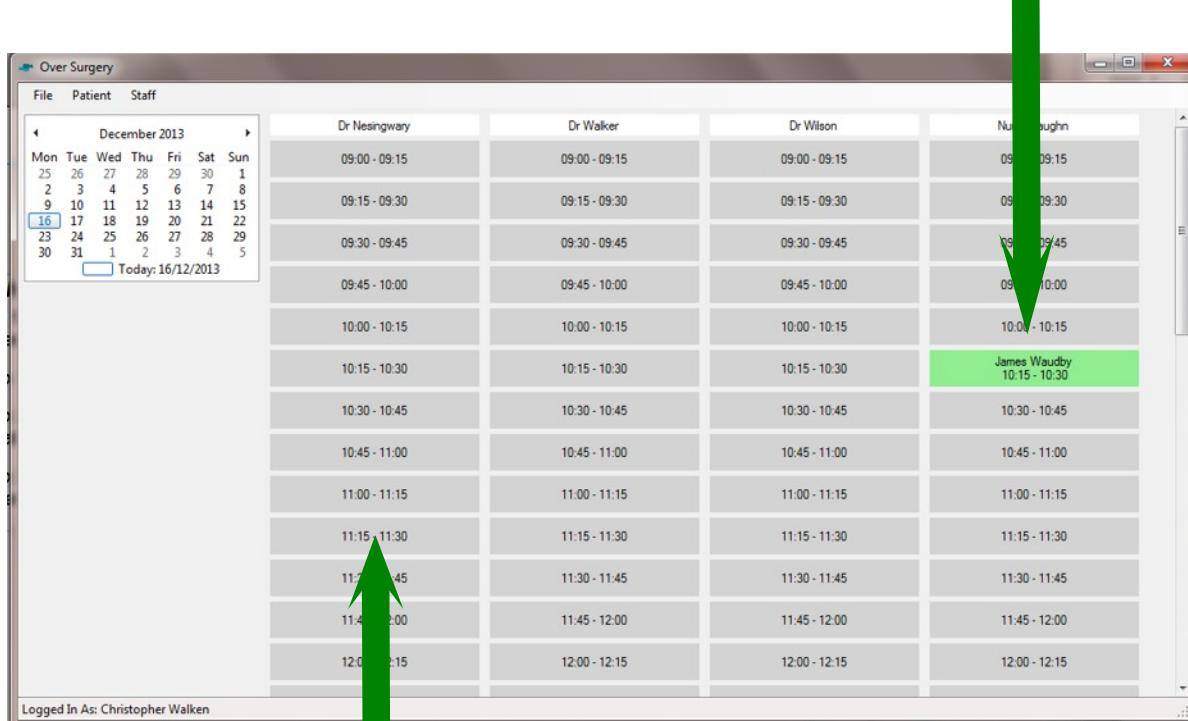
Remember to log out of the system when not using and at the end of the day

5 Check staff availability

This function is viewable in the same way as the previous section.

Step 1 - Once logged on the reception staff will see a screen like the one below. This defaults to the current date and shows the medical staff of duty for that day.

Step 2 - Each staff availability is shown below their respective names. Any booked appointments are highlighted green and will have the name of the patient within that appointment block.



December 2013							Dr Nesingwary	Dr Walker	Dr Wilson	Nurse Vaughan
Mon	Tue	Wed	Thu	Fri	Sat	Sun	09:00 - 09:15	09:00 - 09:15	09:00 - 09:15	09:00 - 09:15
25	26	27	28	29	30	1	09:15 - 09:30	09:15 - 09:30	09:15 - 09:30	09:15 - 09:30
2	3	4	5	6	7	8	09:30 - 09:45	09:30 - 09:45	09:30 - 09:45	09:30 - 09:45
9	10	11	12	13	14	15	09:45 - 10:00	09:45 - 10:00	09:45 - 10:00	09:45 - 10:00
16	17	18	19	20	21	22	10:00 - 10:15	10:00 - 10:15	10:00 - 10:15	10:00 - 10:15
23	24	25	26	27	28	29	10:15 - 10:30	10:15 - 10:30	10:15 - 10:30	James Waudby 10:15 - 10:30
30	31	1	2	3	4	5	10:30 - 10:45	10:30 - 10:45	10:30 - 10:45	10:30 - 10:45
Today: 16/12/2013							10:45 - 11:00	10:45 - 11:00	10:45 - 11:00	10:45 - 11:00
							11:00 - 11:15	11:00 - 11:15	11:00 - 11:15	11:00 - 11:15
							11:15 - 11:30	11:15 - 11:30	11:15 - 11:30	11:15 - 11:30
							11:30 - 11:45	11:30 - 11:45	11:30 - 11:45	11:30 - 11:45
							11:45 - 12:00	11:45 - 12:00	11:45 - 12:00	11:45 - 12:00
							12:00 - 12:15	12:00 - 12:15	12:00 - 12:15	12:00 - 12:15

Logged In As: Christopher Walken

Example time slot available

Step 3 - Any greyed boxes indicate the member of the medical staff is available for that time slot.

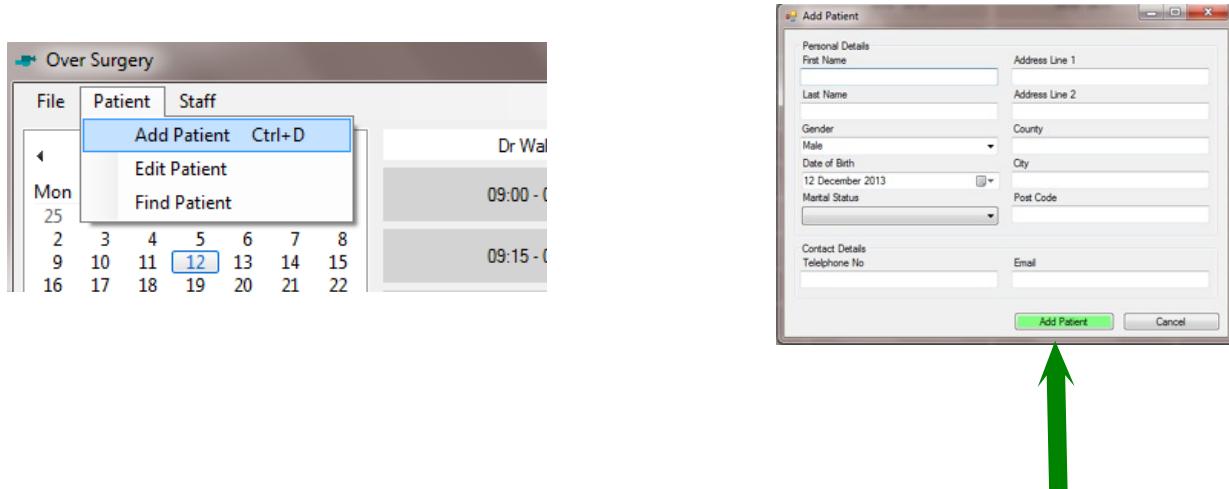
Note only future time slots will be available as per section 9 'Add a new appointment'

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6 Register new patient

Step 1 - Select at the top left of the form **Patient** then **Add Patient** (shortcut Ctrl + D)



Step 2 - A new box will appear - fill in all the details and then select the 'add patient' button

Note - please complete as fully as possible. Incorrect completed fields or missed out fields will be highlighted.

7 Find a patient

Step 1 - Select at the top left of the form **Patient** then **Find Patient**. A new form will open called 'FormFindPatient'.

Step 2 - Enter what details are known of the patient and press the 'Find Patient' button.

Step 3 - A list of patients matching the search will be displayed

PatientID	FirstName	LastName	DateOfBirth	AddressLine
10006	andy	tumer	10/07/1981	the stable
10007	vicky	tumer	12/12/2013	the stable

Step 4 - Double click on the patient you want to view and their details will be displayed in the 'Patient Details' section.

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8 Modify a patient

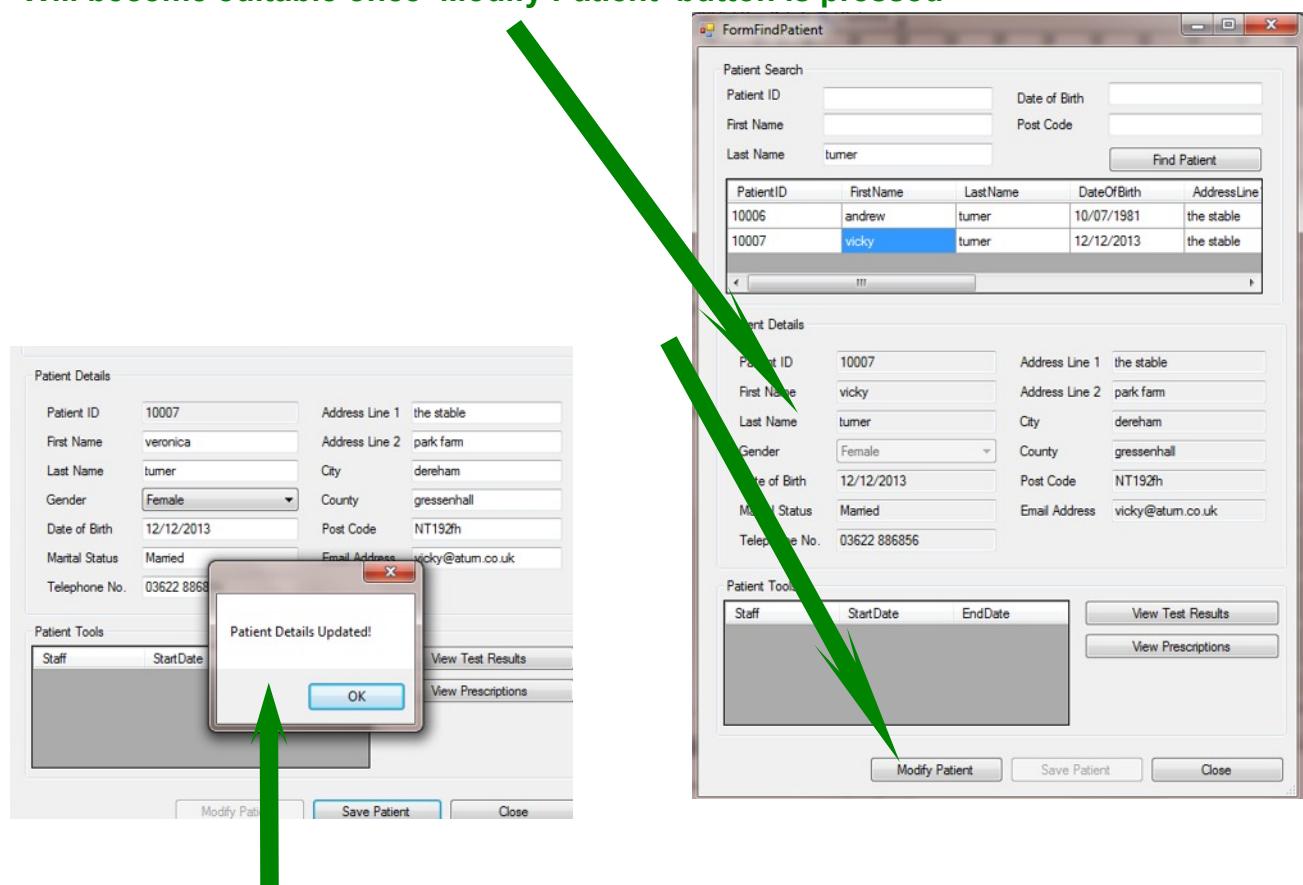
This can be done via the 'Find Patient' Form.

Step 1 - Once your patient has been selected and their details place in the bottom of the form as per *step 4* for find a patient (section 7).

Step 2 - At the bottom of the form select the 'Modify Patient' button. The patient details will be editable.

Step 3 - Change the details about the patient as required and once completed select the 'Save Patient' button. A pop up box with confirm the changes.

Will become editable once 'Modify Patient' button is pressed



Pop up box confirms the patient details have been updated

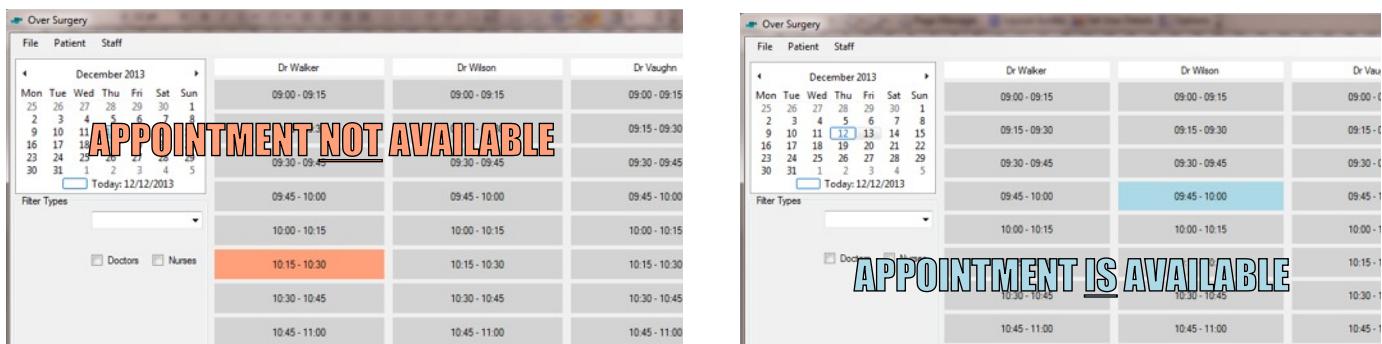
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9 Add a new appointment

Doctors and Nurse appointments are split into 15 minute slots and are viewable for the receptionists as soon as they log on to the system.

Step 1 - To book a new appointment pass the mouse over the time slots below each medical staff member. A salmon coloured box indicates the appointment slot is not available and the blue indicates the appointment slot is available.



Step 2 - Double click on a blue available appointment block and a new window will open up called 'Appointment Details'.

Appointment Details

Patient Search				
Patient ID		Date of Birth		
First Name		Post Code		
Last Name	tumer	<input type="button" value="Find Patient"/>		
Patient ID	FirstName	LastName	DateOfBirth	
10006	andrew	tumer	10/07/1981	the stable
10007	veronica	tumer	12/12/2013	the stable
<input type="button" value="<"/> <input type="button" value="!"/> <input type="button" value=">"/>				

Appointment Details

Staff Name	Owen Wilson	Date	13/12/2013
Start Time	11:30	End Time	11:45

Patient Details

Patient ID	10006	Address Line 1	the stable
First Name	andrew	Address Line 2	park farm
Last Name	tumer	City	norfolk
Gender	Male	County	dereham
Date of Birth	10/07/1981	Post Code	n19 2qj
Martial Status	Married	Email Address	office@atum.co.uk
Telephone No.	01236 9898556		

Step 3 - Fill in the patient details at the top of the form and press the 'Find Patient' button.

- Step 4 - Double click on the patient details to use.

Step 5 - Press the 'Add' button to save the appointment.



The appointment is added

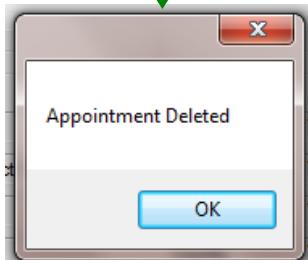
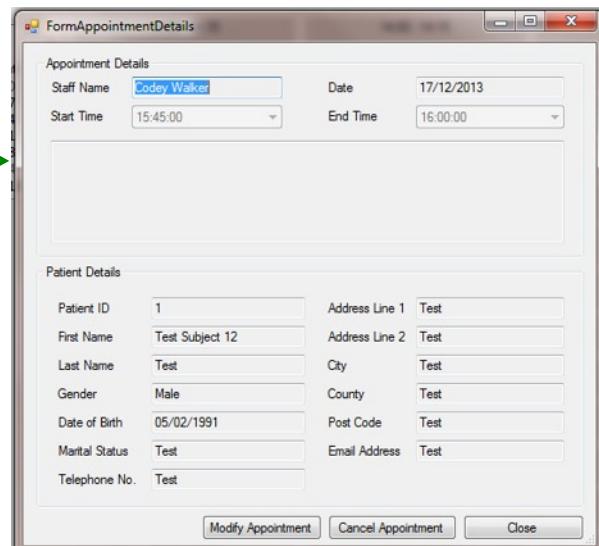
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10 Cancel and modify an appointment

Step 1 - To cancel an appointment double click on the appointment in the main window and a new form will open with the appointment details. 

Step 2 - Select the 'Cancel Appointment' button. A pop up message box will appear confirming the appointment has been deleted.

Note - To modify an appointment cancel the appointment and then re-book using the normal booking procedure.

11 Add absences

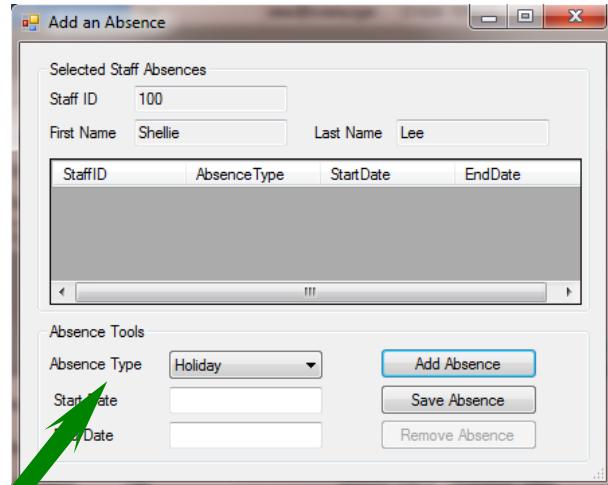
Step 1 - Select from the top left navigation menu select **Staff** then **Find Staff**.

Step 2 - Use the 'Find Staff Member' to search for the staff member. Double click on the one you want to select so their details appear in the 'Staff Details' part of the form.

Step 3 - Select the 'View Absences' button. A new form called 'Add an absence' will be displayed. Press the 'Add Absence' button. The 'Absence Tools' will now be visible.

Step 4 - Enter the details for the absence and press the 'Save Absence' button.

Add an Absence Form



Enter Absence Details

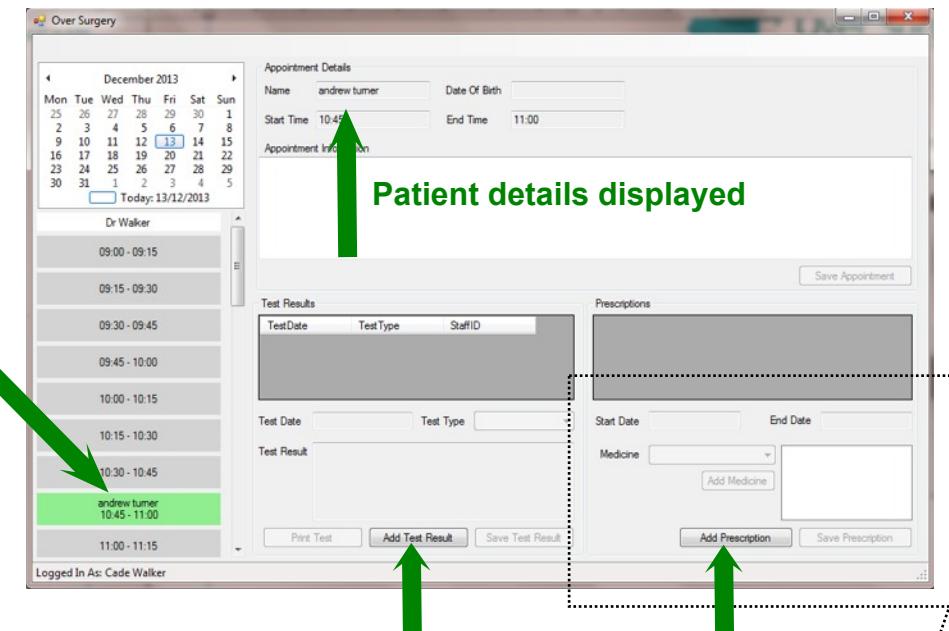
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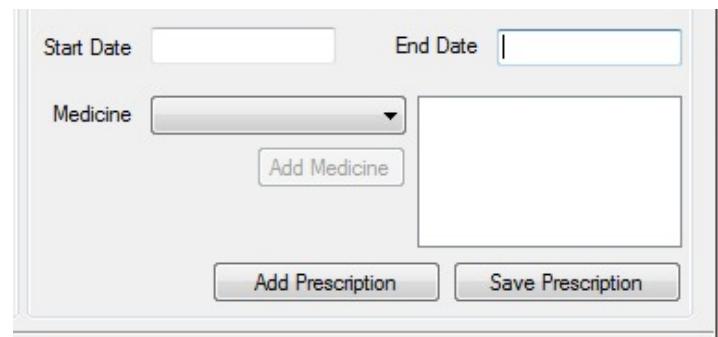
12 Create and amend prescriptions

Doctors can create and amend prescriptions and this is accessible through their main form. As an example we can see Dr Walkers main form. We can see he has an appointment at 10.45 as it is highlighted in green.

Step 1 - Double click on the appointment. The patient details are displayed and the 'Add Test Results' and 'Add Prescription' buttons become available.

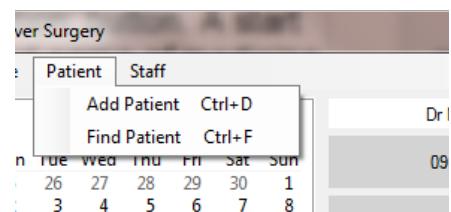


Step 2 - To add a prescription select the 'Add Prescription' button. A start date, end date and name of medicine can then be selected from the 'Medicine' drop down. Select the medicines and then press the 'Save Prescription' button



View prescriptions

Admin staff can view patients prescriptions via the find a patient function by selecting **Patient** then **Find Patient**. Search for the patient.



Step 1 - Once the patient has been selected and their details shown at the bottom of the patient form the 'View Prescriptions' button will be active. Select this to view the patients allocated prescriptions.



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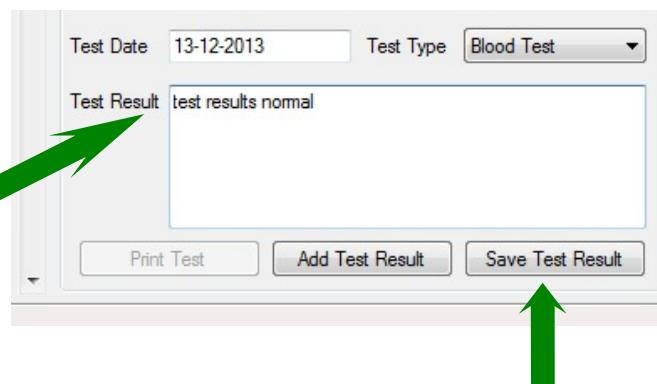
13 Add, Save and Print test results

Some of the steps for test results are similar to the previous section (Number 12).

Step 1 - Double click on the appointment. The patient details are displayed and the 'Add Test Results' and 'Add Prescription' buttons become available.

Step 2 - To add a test result select the 'Add Test Result' button.

Step 3 - Enter a test date, select a test type from the drop down option and type the results into the 'Test Results'.

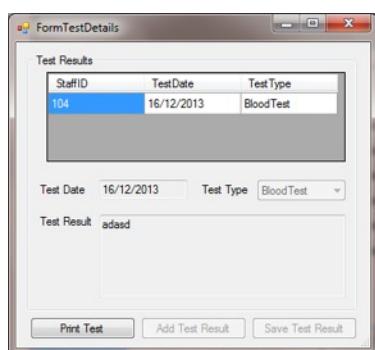
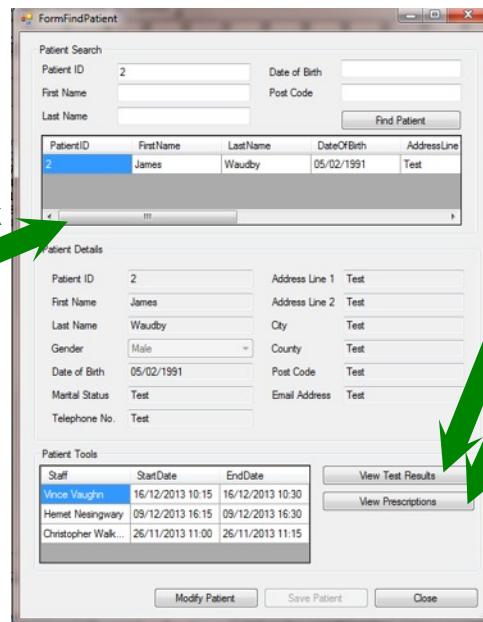


Step 4 - Press the 'Save Test Results' button to save the results to the patients records.

Print test results

This is accessed via the form used to find a patient.

Step 1 - Once the patient has been found and selected by double clicking on their details, the 'View Test Results' and 'View Prescriptions' buttons will be active.

Step 2 - Click on the 'View Test Results' button and a new test details box will open. Double click on the test result to display below. The 'Print Test' button will then be active. Select to print the results.

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14 System Security and Data Protection

All data held by the practice should comply with the Data Protection Act 1998. Any request for access to notes by a patient, patient's representative or outside body will be dealt with in accordance with the Act.

All users of the system should record and process data in accordance with the act. If unsure please contact your data protection officer or line manager.

Data protection do's and don'ts

DO's

- Comply with Data Protection Principles at all times;
- Remember the Act applies to paper files, information held electronically, video/DVD, audiotapes and photographs;
- Think of personal data held about individuals as though it were held about you;
- Get permission from the data subject to hold their personal data unless consent is obviously implied;
- Be particularly careful about sensitive data: concerning race, political opinion, religious belief, trade union membership, physical or mental health, sexual life, criminal offences;
- Hold personal data about people only when necessary;
- Do your best to ensure personal data is kept accurate and up to date;
- Tell people you hold personal data about them and tell them why you need to do so (fair processing);
- Be open with people about information held about them;
- Be very careful about passing personal data to third parties;
- Respect confidentiality and the rights of the data subject;
- Ensure all personal data is disposed of as confidential waste;
- Realise even deleted emails may be retrieved and revealed to those about whom they are written;
- Hold personal data in such a way that it can be collected for inspection at short notice;
- Where possible, anonymise personal data for statistical analysis;
- Direct any official requests to see personal data to the Over Surgery Designated Data Protection

DON'TS

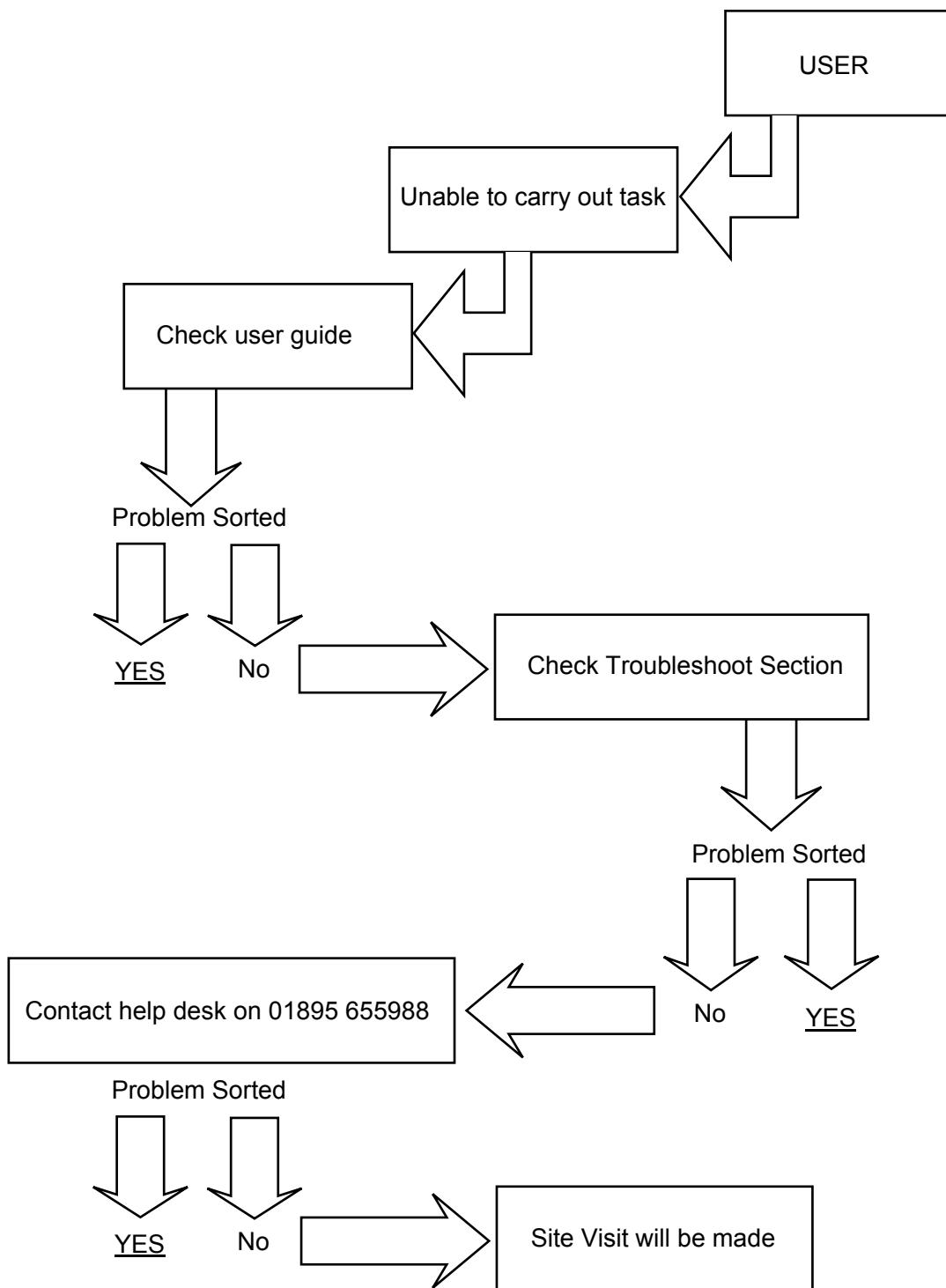
- Worry about the complexities of the Act - the Data Protection Principles are simple;
- Reveal personal data to third parties without the data subject's permission or justification Disclose any personal data over the telephone;
- Hold sensitive data about a person without explicit consent or advice from the Information Rights Officer;
- Leave personal data insecure in any way, whether it is physical files or information held electronically;
- Take personal data home without particular care for security and authority
- Process personal data on a computer not owned or supplied by the Over Surgery
- Use personal data held for one purpose for a different purpose without permission from the data subject;
- Aside from routine amendments, erase or alter any personal data after the Designated Protection Officer has received a request to inspect and/or disclose that personal data.

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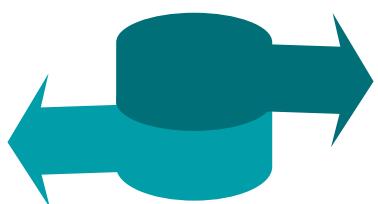
15 System bugs and error reporting procedure

This section provides details of how to report system errors beyond the scope of this guide. The diagram below shows a flow of steps that should be taken to try and deal with any user issues. If in doubt contact your line manager or designated onsite trainer.



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Over Surgery