

OpenEyes for Admissions Staff

(User Manual)

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In case of any query please contact OPO team – Ext 4752

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Colour Key: OpenEyes Form links, OpenEyes navigation links, Notes, Field names

Aims

This session is designed to introduce delegates to OpenEyes by presenting Healthcare professionals to the technology to be able to document the clinical journey of patients under their care. The session aims to give the best practices on better patient care and management.

The admissions staff will use mainly viewing letters, creating a waitlist entry and scheduling a booking.

The following features are included in this course:

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Documentation History

Date	Version number	Revision details	Written by	Approved by
25/11/2014	0.1	First draft of document	Kevin Wood	OpenEyes Programme Office

Document Status

This is a controlled document.

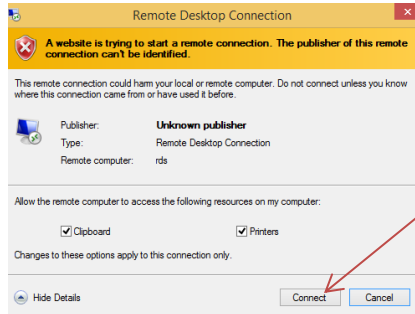
This document version is only valid at the time it is retrieved from controlled file store, after which a new approved version will replace it.

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Logging on and Getting Started

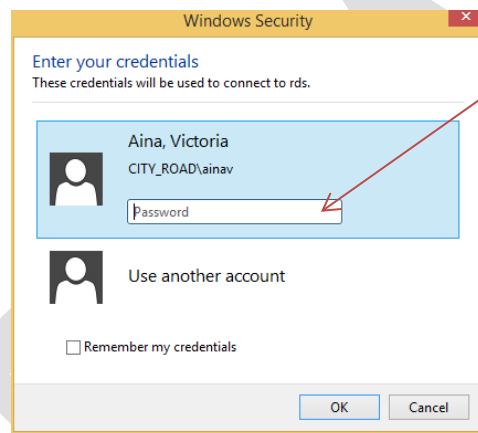
The OpenEyes login page is case sensitive.

- Select the clinical services link within the intranet.
- The remote desktop pop up box opens, select the grey connect button situated within the box.



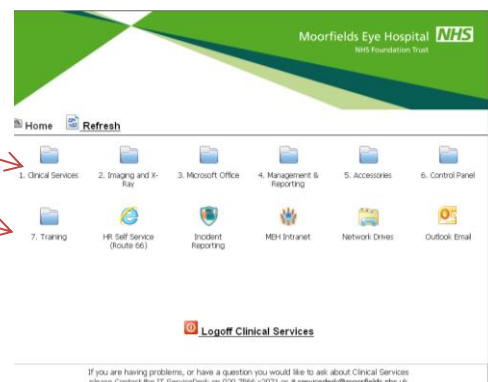
REMOTE DESKTOP POP UP BOX 1

- Within the 'Windows Security' pop up box enter password.



WINDOWS SECURITY POP UP BOX 2

- Select Clinical services folder.
- For training select the Training folder.





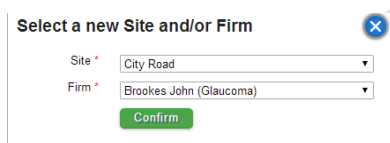
OpenEyes
Training Icon.

- Launch **Open Eyes** by selecting (double click) the
- Delegates will now have entered the OpenEyes page and be able to view the login page.
- Enter Username and Password then select the blue login button .

Searching for a Patient

Scan barcode on notes if scanners present

1. Select site and/or firm from the pop up box then the green confirm button.



Select a new Site and/or Firm

Site * City Road

Firm * Brookes John (Glaucoma)

Confirm

Diagnosis, Templates and medication will be firm dependent.

2. Search for the Patient allocated by the Trainer using the search criteria.
3. Example - Hospital Number: 1000001



OpenEyes

You are logged in as:
User User

Site: City Road, Firm: Barlow Health (Glaucoma) (Change)

Search

Find a patient by Hospital Number, NHS Number, Firstname Surname or Surname, Firstname

Enter search...

Search

4. Then select search to open the patient record.

Overview of Summary Page

Some delegates may find that demographic details may need to be altered, this action can currently be altered/updated in PAS.

The screenshot displays the OpenEyes Patient Summary page for a patient named Chay Close. The page is divided into several sections, each with a callout box explaining its function:

- Alerts for conditions and allergies are viewable.** Points to the top orange banner indicating the patient is diabetic and has allergies to Penicillin and Sulphonamides.
- Patient demographics** points to the 'Personal Details' section on the left, which includes fields for First name(s), Last name, Address, Date of Birth, Age, Gender, Ethnic Group, Contact details (Telephone, Email), General Practitioner, and Associated contacts.
- Patient Episodes of care.** Points to the 'All Episodes' table, which lists medical events with columns for Start Date, End Date, Firm, Subspecialty, Eye, and Diagnosis.
- Link takes you to last event recorded.** Points to the 'Latest Event in Glaucoma: Prescription (17 Apr 2013)' link.
- Patient clinical summary.** Points to the 'Other ophthalmic diagnoses', 'Systemic Diagnoses', 'Previous ophthalmic surgery', and 'Medication' sections on the right.

Personal Details:

First name(s):	Chay
Last name:	Close
Address:	Unknown
Date of Birth:	2 Nov 1920
Age:	93
Gender:	Female
Ethnic Group:	Unknown

Contact details:

Telephone:	04130 4541610
Email:	Unknown

General Practitioner:

Name:	Unknown
Practice Address:	Unknown
Practice Telephone:	Unknown

Associated contacts:

Name	Location	Type
Add contact: Staff		

All Episodes (open 7 | closed 0)

Start Date	End Date	Firm	Subspecialty	Eye	Diagnosis
20 Dec 2011		Abou-Rayyah Yassin	Adnexal	Both	Chalazion
17 Jan 2012		Andrews Richard	Medical Retinal	Left	Malignant melanoma of choroid
14 Apr 2013		Brookes John	Glaucoma	Left	Pigmentary glaucoma
3 Jun 2013		Allan Bruce	Cataract	Left	Aphakia
31 Jul 2013		Allan Bruce	External	No diagnosis	No diagnosis
22 Oct 2013		Aylward Bill	Vitreoretinal	Both	Macular hole
22 Aug 2014		N/A	Support Services	No diagnosis	No diagnosis

Latest Event in Glaucoma: Prescription (17 Apr 2013)

Other ophthalmic diagnoses

Date	Diagnosis	Actions
14 Apr 2013	Right Age related macular degeneration	Remove
14 Apr 2013	Right Low tension glaucoma	Remove
14 Apr 2013	Right Pigment dispersion syndrome	Remove
14 Apr 2013	Right Acute angle-closure glaucoma	Remove
14 Apr 2013	Right Secondary glaucoma	Remove
14 Apr 2013	Right Acute angle-closure glaucoma	Remove

Add Ophthalmic Diagnosis

Systemic Diagnoses

Date	Diagnosis	Actions
2013	Diabetes mellitus type 1	Remove
14 Apr 2013	Myocardial infarction	Remove
14 Apr 2013	Marfan's syndrome	Remove
14 Apr 2013	Marfan's syndrome	Remove

Add Systemic Diagnosis

Previous ophthalmic surgery

Date	Operation	Actions
16 Oct 2013	Right Cataract surgery	Edit Remove

Add Previous ophthalmic surgery

Medication

Current

Medication	Acetazolamide 250mg tablets
Administration	1 tablet(s) PO qid
Date	22 Aug 2014 -
Actions	Edit Stop Delete
Adherence	Not Recorded
Comments	Not Recorded
Actions	Edit

Add Medication

Episodes and Events

Definition of:

Episode – An episode is a collection of events relating to the care of a patient under a consultant / firm and representing a complete picture of the clinical management of a single condition. For example, a patient treated for a right cataract would have an episode containing a referral letter, examination, biometry, operation note, prescription and discharge letter.

Event – An event is a distinct clinical occurrence, which may happen to a patient during the course of their care. The range of events includes referral letters, clinical examinations, pre-assessments, operations and letters to GP's.

Access to patient episodes is via the Patient Summary screen.

Example - Patient with two episodes.

All Episodes					
open 2 closed 0					
Start Date	End Date	Firm	Subspecialty	Eye	Diagnosis
Ophthalmology					
12 Aug 2013		Westcott Mark	Medical Retinal	No diagnosis	No diagnosis
15 Sep 2014		Brookes John	Glaucoma	Both	Angle recession glaucoma

Latest Event in Glaucoma: Examination (19 Sep 2014)

Example - Patient with no episodes.

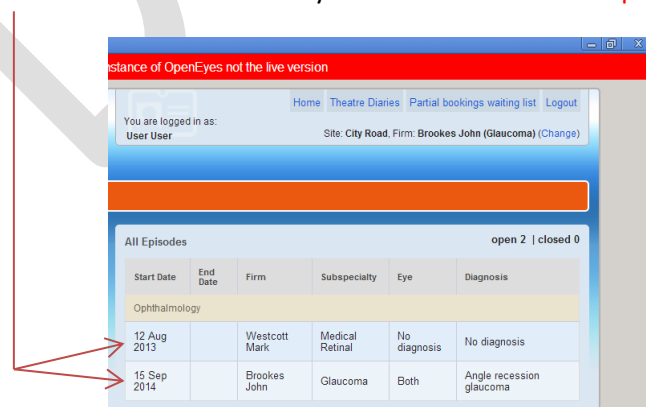
All Episodes	
open 0 closed 0	
No episodes	
Create episode / add event	

Open episode = indicates on-going clinical care and is current. i.e. has a start date but no end date

Closed episode = has a start and end date and represents a period of clinical care under a Consultant that has finished.

Opening an Episode

1. Select Episode from the Patient Summary screen. **Ensure correct episode is selected.**



- The Episodes and events Summary screen will open.

Summary opens with View tab selected.

Headings are in blue text.

Selecting show will expand that section.

The screenshot shows the OpenEyes interface with the following details:

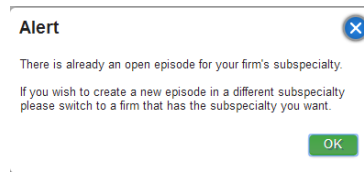
- Header:** OpenEyes training - This is the training instance of OpenEyes not the live version
- Patient Info:** COCKERELL, Darby (70), No. 1000345, NHS 666 374 8924
- Navigation:** Home, Theatre Diaries, Partial bookings waiting list, Logout
- Left Panel (Episodes and events):**
 - Add Episode:** Ophthalmology, 12 Aug 2013, Medical Retinal (Episode Summary)
 - Add event:** 15 Sep 2014, 15 Sep 2014, 17 Sep 2014, 19 Sep 2014 (all Glaucoma)
- Main Content (Summary):**
 - Summary:** Glaucoma
 - Overview:** Male, 70, CVI status: Severely Sight Impaired, Driving status: Motor vehicle
 - Principal diagnosis:** Angle recession glaucoma
 - Principal eye:** Both
 - Refraction:** 0.00/0.00 @ 0° Auto-refraction, 0.00/0.00 @ 9° Auto-refraction
 - CCT:** Not recorded
 - IOP1:** 7 mmHg, 8 mmHg
 - Glaucoma Management Plan:** (not recorded)
 - IOP History:** (show button)
 - Visual Acuity History:** (show button)
 - Visual Fields History:** No visual field images recorded for this patient.
 - Start Date:** 15 Sep 2014, **End date:** (still open)
 - Subspecialty:** Glaucoma, **Consultant firm:** Brookes John
 - Episode Status:** New
 - Status last changed by:** User User on 15 Sep 2014 at 16:05

- Top left side of the patient's episode summary screen you can view the patients episodes. In the example, below, the patient has both Glaucoma and Medical Retinal episodes.
- To change view from one episode summary to another, select **Episode Summary** of chosen episode.

The screenshot shows the OpenEyes interface with the following details:

- Header:** OpenEyes - Episode Patient
- Patient Info:** COCKERELL, No. 1000345, NHS 666 374
- Navigation:** Home, Theatre Diaries, Partial bookings waiting list, Logout
- Left Panel (Episodes and events):**
 - Add Episode:** Ophthalmology, 12 Aug 2013, Medical Retinal (Episode Summary)
 - Add event:** 15 Sep 2014, 15 Sep 2014, 17 Sep 2014, 19 Sep 2014 (all Glaucoma)
- Main Content (Summary):**
 - Summary:** Glaucoma
 - Overview:** Male, 70, CVI
 - Principal diagnosis:** Angle recession glaucoma

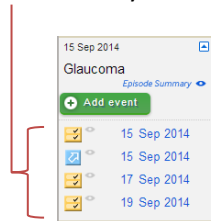
- If you select **Add Episode** whilst you have an episode open, you will get the following message.



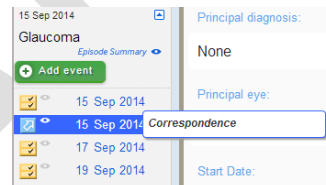
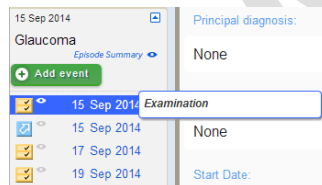
6. Select **OK** to clear message.

Viewing Events

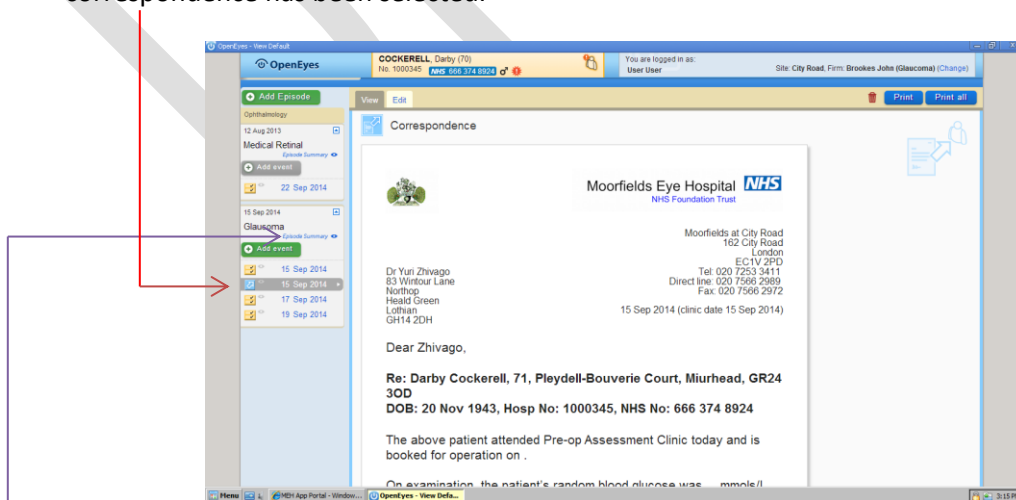
1. Top left side of the patient's episode summary screen you can view the patients events.



2. For each type of event a different icon is used, along with the date the event was undertaken.
3. By placing the mouse over an icon, a pop-up will tell you the type of event. See examples below.



4. Select the event you wish to view and it will display on screen. In the example below, correspondence has been selected.

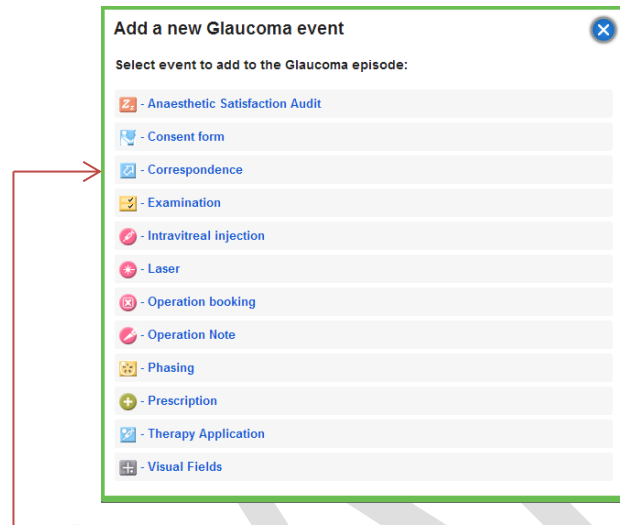


5. To view another event you just select again from the events list, otherwise, if you wish to return to the Episode Summary select **Episode Summary** for the appropriate sub-specialty.

Adding Correspondence

Ensure the correct firm is selected BEFORE creating or editing letters. Letters can be edited by the original writer, saved as Draft or saved and printed.

1. Select **+ Add event** upper left of Episode summary screen.
2. **Add a new event** options list appears in a pop up screen. Note the different icons against each event.



3. Select the event required (In this instance **Correspondence** will be selected).

4. Correspondence screen opens.

The screenshot shows the 'Create' correspondence screen with the following fields and annotations:

- Event Date:** 24 Oct 2014. Annotation: "Event Date will pull in current date."
- Recipient:** Moorfields at City Road. Annotation: "Select Recipient (names are pulled from the Add Associated Contact list on Patient Summary Screen)".
- Macro:** 24 Oct 2014. Annotation: "Select Macro to use template for the selected".
- Clinic Date:** 19 Sep 2014.
- Direct Line:** 020 7566 2989.
- Patient details:** Darby Cockerell, 71, Pleydell-Bouverie Court, Miurhead, GR24 3OD, DOB: 20 Nov 1943, Hosp No: 1000345, NHS No: 666 374 8924. Annotation: "Patient details".
- Drop down menus:** Introduction, Findings, Diagnosis, Management, Drugs, Outcome. Annotation: "Each drop down menu offers pre-defined text to select. In addition free text can be typed into this field."
- From:** type to search for users. Annotation: "Type staff surname and select from list."
- Signature:** Yours sincerely, Mr Test User, user role, Consultant: Mr John Brookes. Annotation: "Ensure letter is signed in this area."
- Cc:** -Cc-. Annotation: "For Cc select from drop down menu or type address of other Consultants or contacts. For Paeds patients type: Parent or Guardian of."
- Enclosures:** Add.

Important : Letters must be spell-checked and proof read. Right click in this area to access the spell checker.

5. Once letter completed there are three options:

Cancel - To delete letter without saving.

Save draft – To save letter in draft format so that you may go back into letter and edit prior to save and printing it.

Save and print – To save and print the document.

Using Save draft function.

6. Select **Save draft**. Screen displays the letter with draft watermark on page.

The Correspondence event is now added to the episode and can be selected to view.

Note the View tab is active.

The screenshot shows a web application interface for Moorfields Eye Hospital. On the left, there's a sidebar with a list of events. The main content area displays a letter template. The letter is addressed to Dr Yuri Zhivago at 83 Wintour Lane, Northop, Head Green, Lothian, GH14 2DH. The letter is dated 24 Oct 2014 (clinic date 19 Sep 2014). The patient's details are: Re: Darby Cockerell, 71, Pleydell-Bouverie Court, Muirhead, GR24 3OD, DOB: 20 Nov 1943, Hosp No: 1000345, NHS No: 666 374 8924. The 'View' tab is active, and the 'Print' and 'Print all' buttons are visible in the top right corner.

7. Select **Print** will print one copy of letter. Select **Print all** will print all letters including copies.

8. Select  to delete letter. Delete event warning prompt opens.

Select **Reason for deletion** and free text in the field.

The screenshot shows a 'Delete Correspondence' dialog box. It contains a warning message: 'WARNING: This will permanently delete the event and remove it from view. THIS ACTION CANNOT BE UNDONE.' Below the warning is a text field for 'Reason for deletion'. At the bottom, there are two buttons: 'Delete event' and 'Cancel'.

9. Selecting **Delete event** will remove the letter and cannot be undone. Select **Cancel** if the choice is not to delete the document. Select **Cancel**.

With the letter in draft mode it can be edited.

10. Select, **Edit** tab. The letter can be edited, as appropriate.

11. Once editing is complete, the document can be saved as a draft or saved and printed.

12. Select **Save and print**

13. Print screen opens. Select **Print** to print letter. (*Returned to View screen once selected*)

14. Select Change to select a different printer destination to the default.

15. Select number of copies to print and options, if appropriate.

Creating Waitlist Entries

Opening the booking form

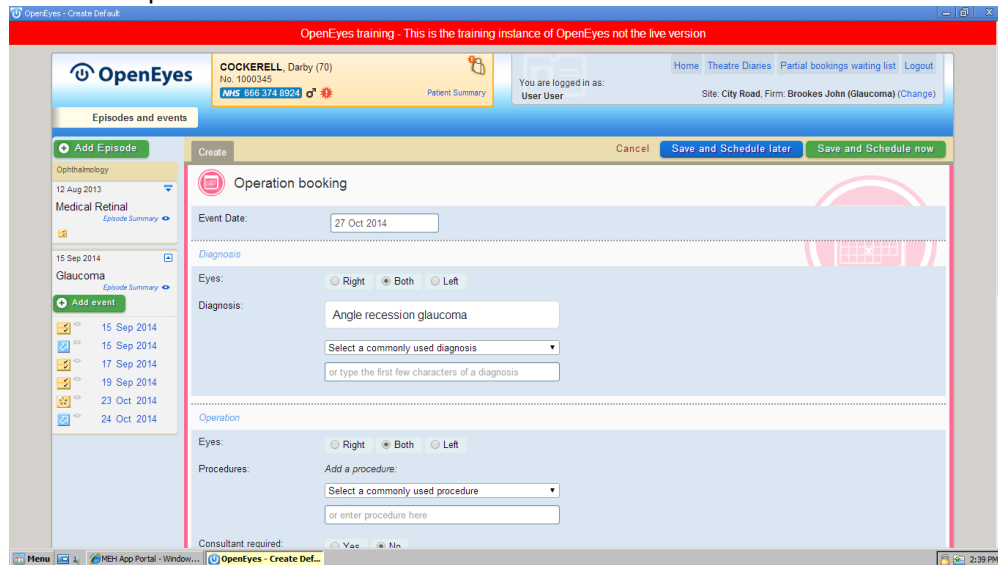
1. Launch Open Eyes application

2. Select required Episode

3. Select Add Event.  The button located on left hand side.

4. Select **Operation Booking**. 

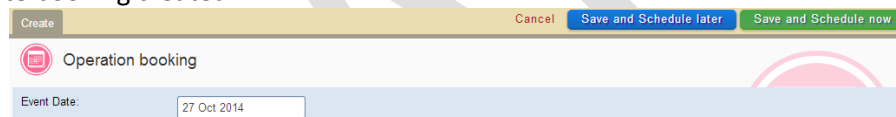
5. The form is now open.



Completing operation booking form

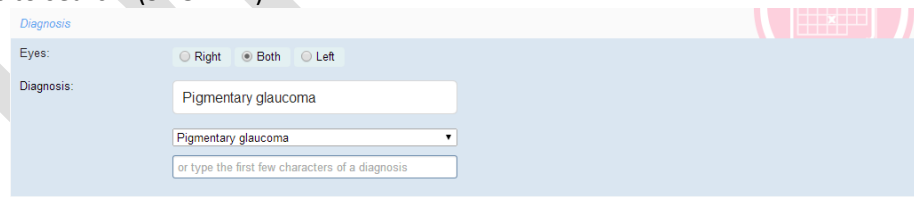
Event Date

1. Enter date booking created



Diagnosis

1. Eyes > Select affected eyes.
2. Diagnosis > choose appropriate diagnosis from drop down menu or type first few characters of a Diagnosis to search. (SNOMED)

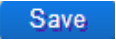


Operation

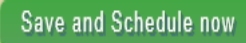
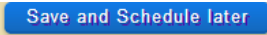
1. **Eyes:** select affected eyes
2. **Procedure:** select appropriate procedure > small window appears showing procedure duration.
3. **Consultant required:** select **Yes** or **No**. If **Yes** is selected, select appropriate Clinician from drop down box.
4. **Senior fellow to do:** select **Yes** or **No**
5. **Any other to do:** select **Yes** or **No**
6. **Anesthetic type:** select appropriate option.
7. **Does the patient require a pre-op assessment by an anaesthetist** select **Yes** or **No**

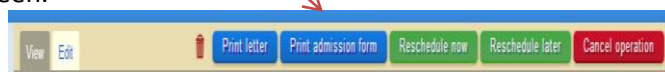
8. **Post operative stay** select **Yes** or **No**.
9. **Anaesthetic choice**: select required option.
10. **Patient needs to stop medication**: Select **Yes**>please provide details' dialog box opens>complete or select **No**.
11. **Post-operative stay**: select **Yes** or **No**
12. **Site**: select appropriate site from drop down menu.
13. **Priority**: Select appropriate.
14. **Decision date**: Leave as default date.
15. **Suitable for high volume (Fast track)**: Select **Yes** or **No**.
16. **Admission discussed with patient**: Select **Yes** or **No**.
17. **Special equipment requirement**: Select **Yes** > 'please specify' comment box opens for completion or **No**.
18. Add any relevant comments within the scheduling guidance for admissions team field
19. Add any relevant RTT comments e.g.:
 - Date of discussion
 - EROD – 1st reasonable offer date
 - 2nd reasonable offer date
 - Date the patient is available from
 - Reason why the offers were declined, e.g. abroad.
 - Any other TCI dates offered
20. Doctor organising admission: Select clinician by typing the name in the search field.

Schedule operation

1. Schedule Options>Choose appropriate option. Patient unavailable period>select  > **choose a start date > Choose an end date> choose a reason from drop down menu.**
2. Select  button at top of screen.
3. Return to the booking form. To complete the scheduling refer to guidance below.

Schedule a Booking

1. Select  button. (Note: Select  if placing on Waitlist.)
2. Schedule Operation screen opens.
Ensure you have the correct firm and site selected.
3. Select theatre slot required(Chooses a date).
4. Select a session time.
5. Select the  located at the bottom right hand side of the screen.
6. The 'Operation booking (Scheduled)' screen open .
7. Print letter. This option can be selected from the pane located at the top of the 'operation booking screen.'



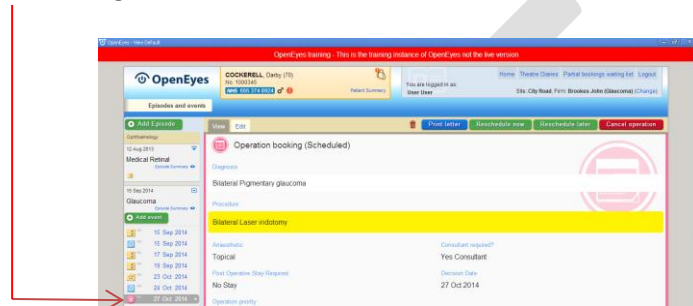
8. Print admissions form. This option can be selected from the pane located at the top of the 'operation booking screen.'

9. Select home to exit Screen



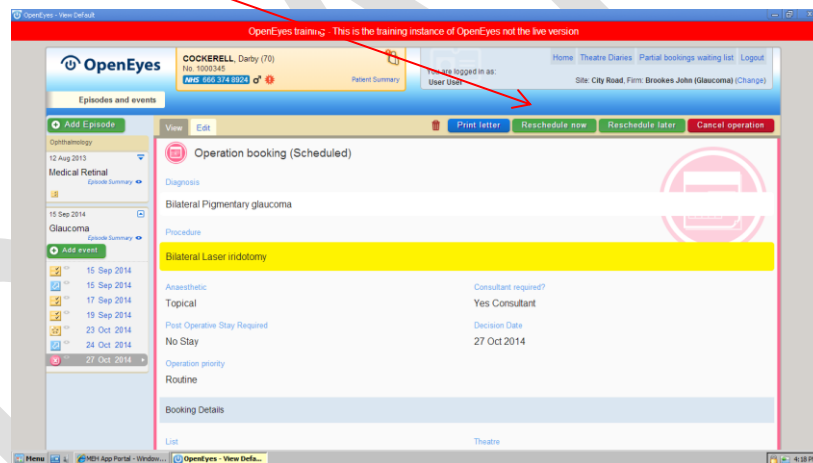
Cancel and Reschedule a Booking

1. Launch Open Eyes application
2. Select required Episode
3. Select Operation booking event to be rescheduled.



4. Select

Reschedule now



5. Re-schedule screen opens displaying current booking details.

COCKERELL, Darby (1000345)

Operation duration: 40 minutes

Current schedule:
Firm: **Brookes John (Glaucoma)**
Location: **Theatre Six (City Road)**
Date of operation: **31 Oct 2014**
Session time: **13:30 - 18:00**
Admission time: **12:00**
Duration of operation: **40 minutes**

EROD: 18 Nov 2014 08:30 - 13:00, Gazzard Gus (Glaucoma)
Initially: 18 Nov 2014 06:30 - 13:00, Gazzard Gus (Glaucoma)

Viewing the schedule for Brookes John

Select theatre slot

Select a session date:

◀ previous month **October 2014** next month ▶

Fri	3	10	17	24	31
-----	---	----	----	----	----

Key: ■ Day of the week ■ Slots Available ■ Limited Slots ■ Full ■ Theatre Closed ■ Selected Date ■ Patient Unavailable

6. Use previous month / next month buttons to identify a new date of procedure. Note colour key chart.
7. Select chosen date. In this instance there is an offer for both am and pm sessions.

◀ previous month **November 2014** next month ▶

Fri	7	14	21	28
-----	---	----	----	----

Key: ■ Day of the week ■ Slots Available ■ Limited Slots ■ Full ■ Theatre Closed ■ Selected Date ■ Patient Unavailable

Select a session time:

Theatre Six (City Road)

08:30 - 13:00 (270 min available)	Consultant Anaesthetist (GA) Paediatric	13:30 - 18:00 (270 min available)	Consultant Anaesthetist (GA) Paediatric
--------------------------------------	---	--------------------------------------	---

- Select the appropriate session. Ward and admission time will be populated by default.

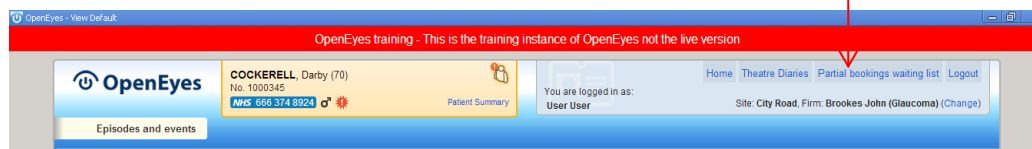
Select Session
Comments
field and free
text.

- Select appropriate **Reschedule Reason** from drop down menu.
- Select Reschedule Comments / Operation Comments/RTT Comments fields to free text additional information.
- Select **Confirm slot** to book. (select **Cancel re-scheduling** to cancel)
- By selecting **Confirm slot** the Operation booking (Rescheduled) screen opens. The information displayed will include, both the new appointment as well as the cancelled appointment.

- Select **Print letter**.

Schedule from Partial Booking Waitlist

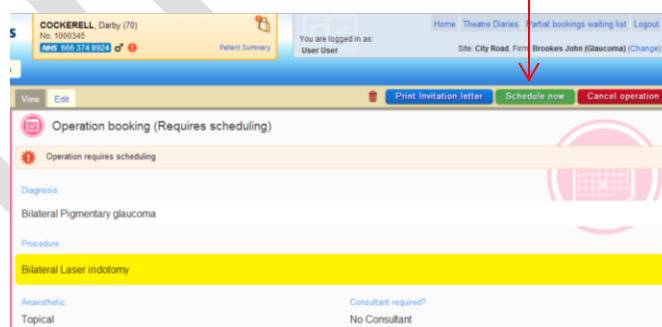
1. Select **Partial bookings waiting list**.



2. Partial booking list opens.

- Search Filters
- Search results based on search filter set.
- Key code for waiting list at bottom of list.

3. Point out search results list show columns for Letters sent, Patient, Hospital number, Location, Procedure, Eye, Firm, Decision date, Priority and Book status.
4. Demonstrate the use of the search filters.
5. Select patient from list by selecting their name in the Patient column.
6. Operation booking (Requires scheduling) screen opens. Select **Schedule now**.



7. Schedule Operation screen opens.
Ensure you have the correct firm and site selected.
8. Select theatre slot required(Chooses a date).
9. Select a session time.
10. Select the **Confirm slot** located at the bottom right hand side of the screen.
11. The 'Operation booking (Scheduled)' screen open .

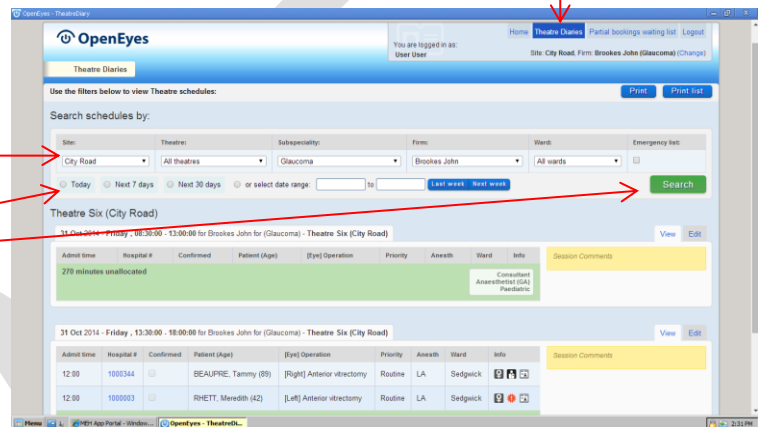
12. Print letter. This option can be selected from the pane located at the top of the 'operation booking screen.'
13. Print admissions form. This option can be selected from the pane located at the top of the 'operation booking screen.'
14. Select home to exit Screen



Review Theatre Lists

1. Select **Theatre Diaries** on the Home Page

- Filter by Site, Firm, Specialty and Ward.
- Select the days or date range.
- Select Search



Info column icons-



(Patient gender) (Consultant required) (Created & Edited by) (Alert / allergies on patient)

2. View list of patients booked and session comments.
3. Click **Print** to print Theatre List.
4. Select **Landscape** from Printer Properties to print List.

Theatre Diary Session

5. To change order of patient and Admit time.
6. Select Edit.



The screenshot shows the 'Theatre Seven (City Road)' interface. At the top, it displays the date and time: '22 Feb 2012 - Wednesday, 08:30 - 13:00 for Aylward Bill for (Vitreoretinal)'. Below this is a table with columns: Admit time, Sort, Hospital #, Confirmed, Patient (Age), [Eye] Operation, Anesth, Ward, and Info. The table contains three rows of patient data. To the right of the table is a 'Comments' section with a text input field. At the bottom right, there are 'Save' and 'Cancel' buttons. A red arrow points from the 'Edit' button in the top right corner of the interface to the 'Edit' button in the list of patients.

Admit time	Sort	Hospital #	Confirmed	Patient (Age)	[Eye] Operation	Anesth	Ward	Info
08:30	5	1000121	☐	Debbie Marcus (76)	[R] Oil	LA	Sedgewick	?
10:40	5	1000009	☐	Rosaleen Chinn (92)	[B] ILM	Topical	Sedgewick	?
07:30	5	1000220	☐	Chet Payne (61)	[R] IOL	Topical	Mackellar	?

190 minutes unallocated
Consultant

Save Cancel

7. Drag to move Patient up or down the list.
8. Change Admission Time.
9. Click on Save to Save Changes.
10. Print list as required.

Logging Off

1. Select **Logout** from the tab located top right hand corner of the screen. *This can be seen from any screen within OpenEyes.*



The screenshot shows the OpenEyes navigation bar. It contains several tabs: 'Home', 'Virtual Clinic', 'Theatre Diaries', 'Partial bookings waiting list', and 'Logout'. The 'Logout' tab is highlighted with a red box. Below the tabs, it says 'You are logged in as: Enoch Root' and 'Site: City Road, Firm: Barton Keith (Glaucoma) (Change)'.

Home Virtual Clinic Theatre Diaries Partial bookings waiting list Logout

You are logged in as: Enoch Root Site: City Road, Firm: Barton Keith (Glaucoma) (Change)