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OPCS-4 Requests Portal User Guide

Amendment History:

Version	Date	Amendment History
0.1		First draft for comment
0.2		Draft including comments from NCS
0.3		Further updates
0.4		Draft including screenshots, comments
0.5		Incorporating document template and final amendments
0.6		Final review to create issued version Final 1.0. Added screenshots
1.0	21 /9/07	Final: published on Portal site
2.0	19/11/2009	Removal of references to Chemotherapy regimens because the DH will be launching a collection service

Forecast Changes:

Anticipated Change	When

Reviewers:

This document must be reviewed by the following. Indicate any delegation for sign off.

Name	Signature	Title / Responsibility	Date	Version
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Approvals:

This document requires the following approvals:

Name	Signature	Title / Responsibility	Date	Version
Lynn Bracewell		NHS Classifications Service Content Manager		

Distribution:

All users of the OPCS-4 Requests Portal

Document Status:

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

On receipt of a new issue, please destroy all previous issues (unless a specified earlier issue is baselined for use throughout the programme).

Related Documents:

These documents will provide additional information.

Ref no	Doc Reference Number	Title	Version
1		OPCS-4 Requests Portal Question and Answer document	
2		OPCS-4 Requests Portal Submission Guidelines Document	
3			

Glossary of Terms:

List any new terms created in this document. Mail the NPO Quality Manager to have these included in the master glossary above [1].

Term	Acronym	Definition
OPCS		Office of Population Census and Surveys
OPCS-4		OPCS Classification of Interventions and Procedures, Version 4.

Contents

1. Purpose of document.....	5
2. Introduction	5
3. Background.....	6
4. OPCS-4 Requests Portal Overview	6
5. Quick Start Guide	7
6. OPCS-4 Request Portal Step-by-Step Guide	8
6.1 Getting started	8
6.2 Making your requests	11
6.3 Tracking your submissions	13
6.4 Managing your account	17

1. Purpose of document

The purpose of this document is to document instruction to use the OPCS-4 Requests Portal. The OPCS-4 Requests Portal is an online facility to enable requests for change for the OPCS-4 classification to be submitted all year around. It also allows stakeholders to track their suggestions thereby improving the review and enhancement of OPCS-4 classification.

The portal was launched by NHS Classifications Service in September 2007.

2. Introduction

OPCS-4 is reviewed annually by the NHS Classifications Service of NHS Connecting for Health to ensure it continues to reflect current clinical practice in the NHS. The review improves the accuracy of NHS coded clinical detail, the quality of NHS coded data and supports the needs of all NHS users to improve planning and delivery of patient care.

To facilitate the review, NHS Connecting for Health has launched a request system to further improve the OPCS-4 annual review process. The OPCS-4 Requests Portal launched in September 2007 enables you to submit change requests for new interventions and procedures directly to the authors of the classification - the NHS Classifications Service.

www.connectingforhealth.nhs.uk/OPCS4requestportal

3. Background

A statistical classification of surgical operations was introduced in the UK in 1944. Over subsequent decades it was periodically revised, culminating in the introduction of the OPCS-4.2 classification, which was fully implemented across the NHS in 1990. This has formed the basis for the recording of clinical procedures since, but no significant changes had been made to the classification. As a result it had not kept pace with changing clinical practice or the new clinical interventions that have been developed since its original release until the enhancement to create OPCS-4.3 released in April 2006.

It was recognised that there has been a longstanding requirement to update or replace the OPCS classification to reflect current clinical practice and to better meet the needs of the user. It also supports the requirements of the Financial Reforms programme of Payments by Results (PbR) which requires revised HRGs, which in turn rely on an up-to-date intervention classification.

OPCS-4 now has a scheduled annual review undertaken by the NHS Classifications Service.

4. OPCS-4 Requests Portal Overview

The OPCS-4 Requests Portal is a content management system that has been built with the needs of coders, clinicians and all NHS and their suppliers interested in the OPCS-4 classifications system in mind. It will enable them to individually submit, store and track change requests via one easy-to-use system. Additional information to support a change, where requested by the NHS Classifications Service as the authors of the classification, can also be easily added via the Portal.

The Portal will enable everyone submitting a request for change to track the progress of their requests being considered by the OPCS-4 Review Team. Requests can be submitted via the Portal at any time. Please refer to the *Submission Guidelines* document for more detail on making requests.

5. Quick Start Guide

More detailed instructions on using the OPCS-4 Requests Portal can be found in the Step-by-Step Guide section. In the meantime Quick Start steps are below: **Note: These Quick Start instructions are not meant to be comprehensive and you will need to read the Step-by-Step Guide to be able to interact fully with the Portal.**

- Paste the following into your internet browser:
www.connectingforhealth.nhs.uk/opcs4requestportal
- **Register** as a user;
- After registration, **log in**, continue to the NHS Connecting for Health (OPCS-4 Requests) home page;
- Before making any submissions read the OPCS-4 Submission Guidelines; for explanation of the fields and other important guidance about making requests for change. These can be accessed by connecting via '**guidance document**'.
- Then click on **New Request** on the right hand menu;
- Click on **Major or Minor** depending on your requirement.
- Complete all fields in the form fully, and then click on **Submit**.
- Repeat the above if you need to submit more than one request.

You can see a summary of your request(s) by clicking on **My Requests** from the menu. My Requests will enable you to track the progress of your submissions via **Status** tab.

Click on the **Export to Excel** for the full details of your submission in a format that you can save to your computer.

There are two searches available in the OPCS-4 Requests Portal:

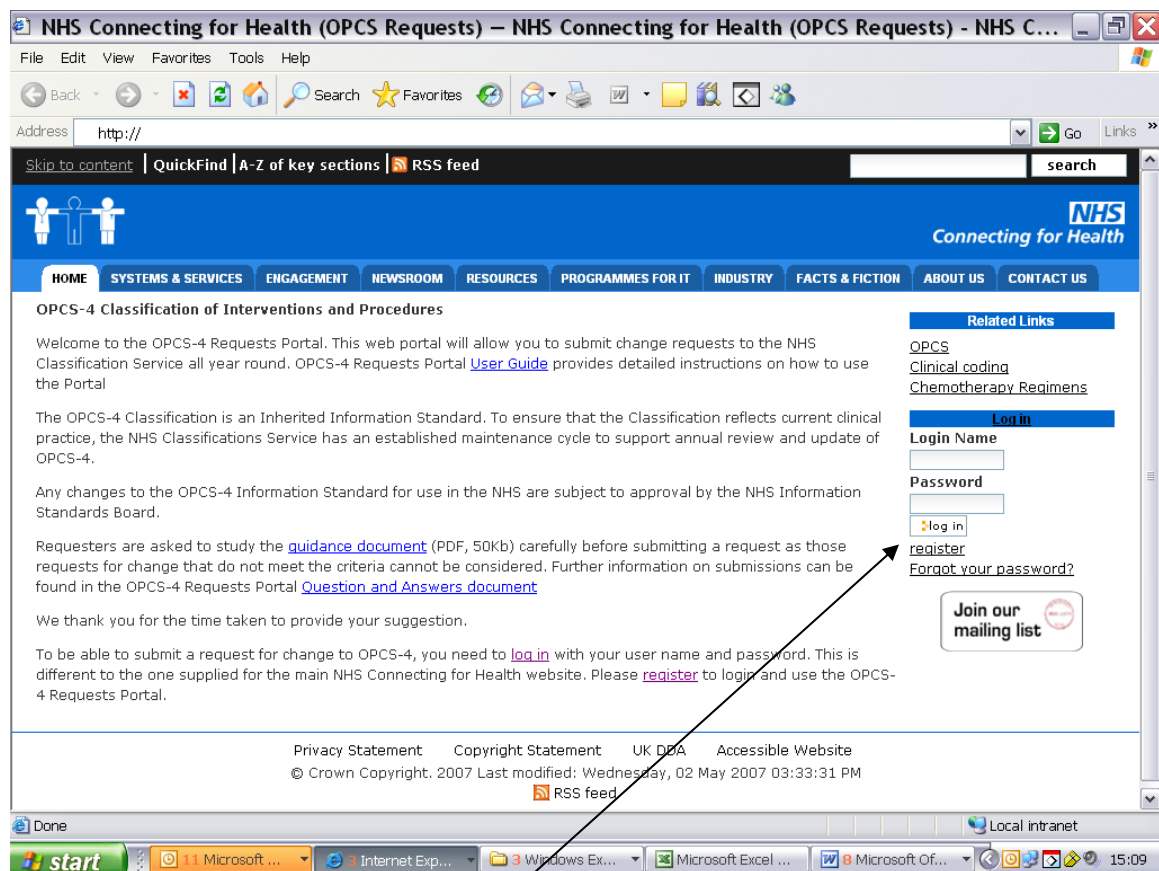
- Select (count) all requests designated minor or major. Select (count) Change Requests logged between specified dates, for example 01 October 2008 to 1 November 2008.

6. OPCS-4 Request Portal Step-by-Step Guide

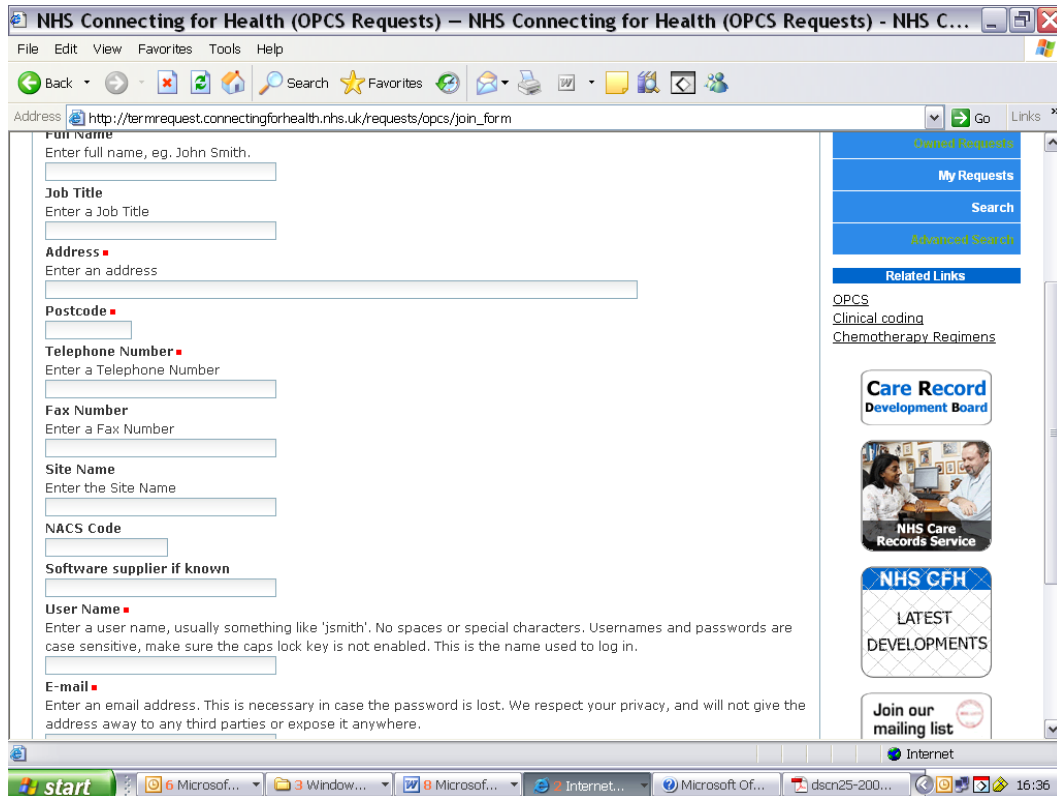
6.1 Getting started

6.1.1 Paste the following address into your internet browser and press return to access the portal:

www.connectingforhealth.nhs.uk/opcs4requestportal The screen below will be displayed.

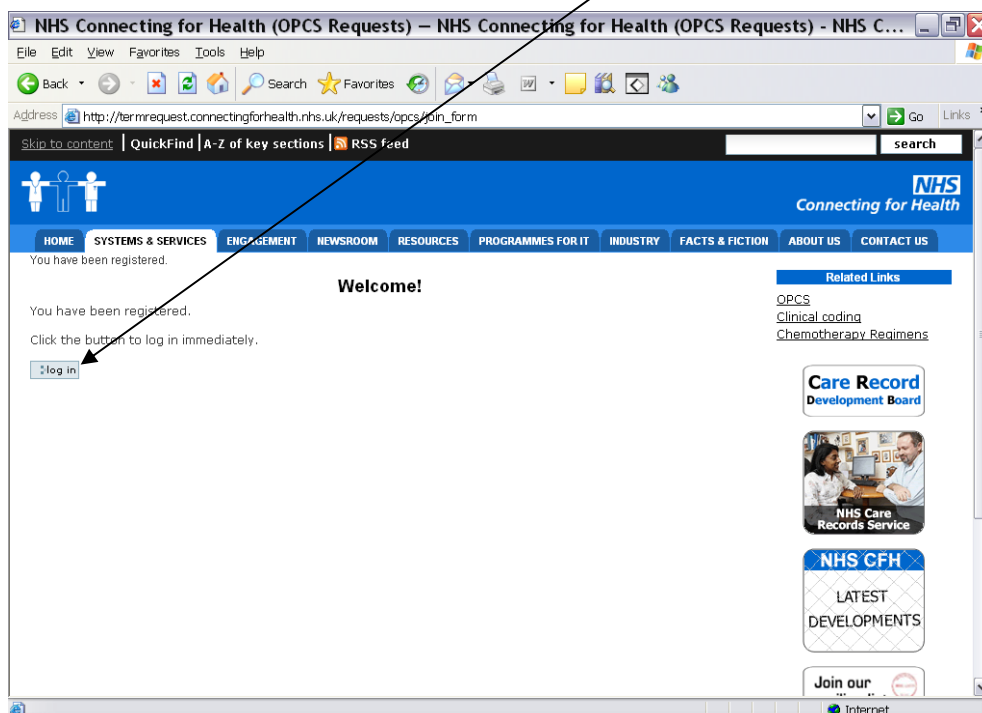


6.1.2 Click on the link [Register](#) at the bottom of the screen. The following page will be displayed. Please complete all fields in the form accurately.

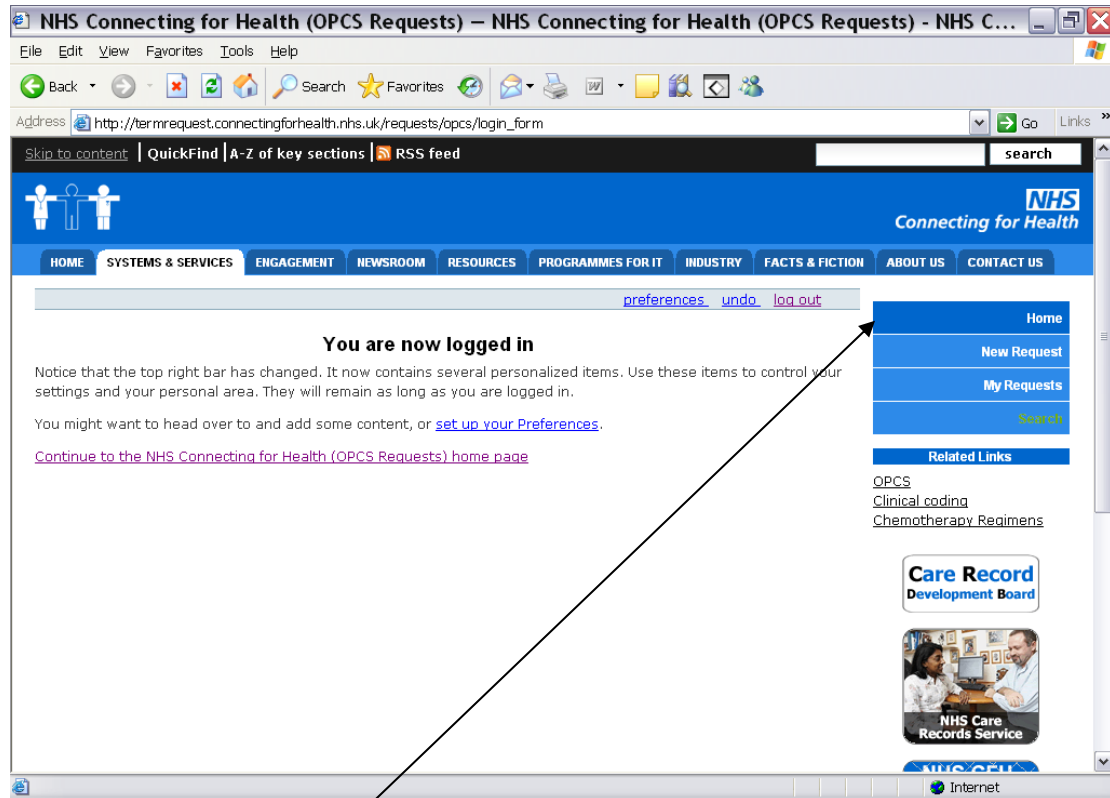


Your email address and telephone number will only be used to contact you regarding your submission.

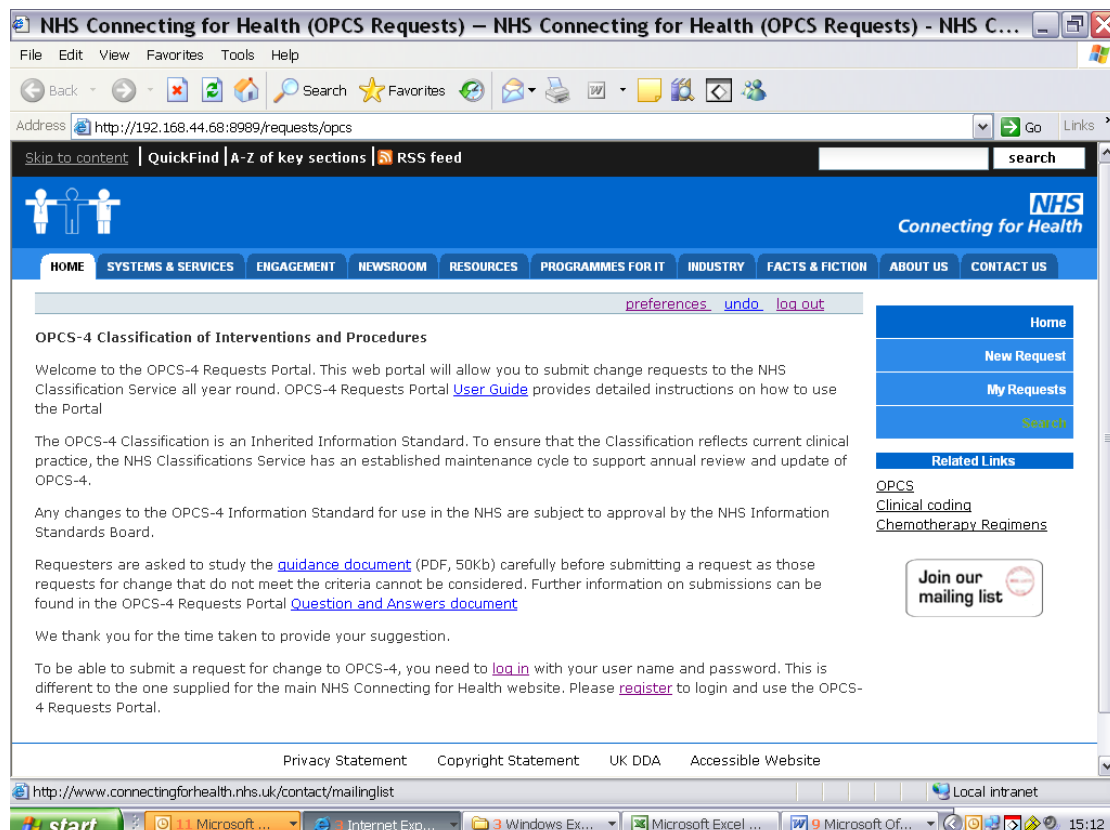
6.1.3 Following successful registration you will be presented with the following screen. Please click the **Log in** button to begin.



The following screen will then be displayed:



6.1.4 Click on **Home**. The following screen is displayed:

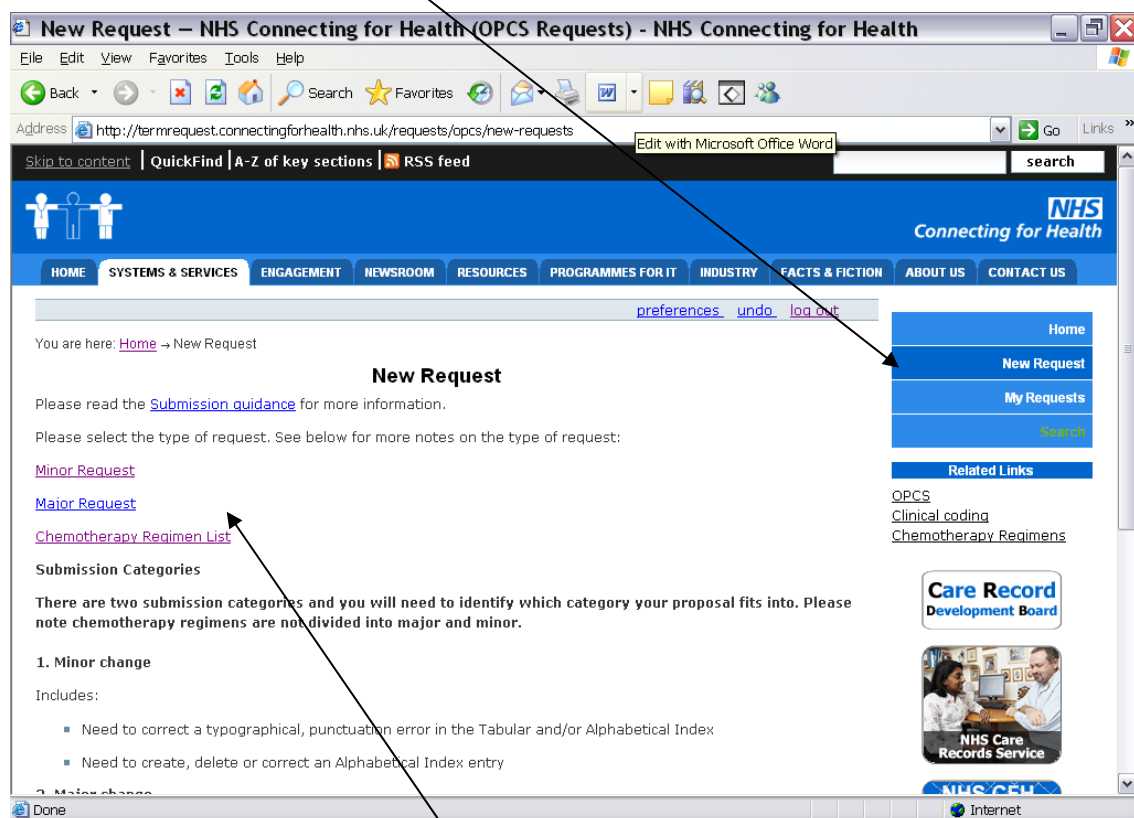


6.2 Making your requests

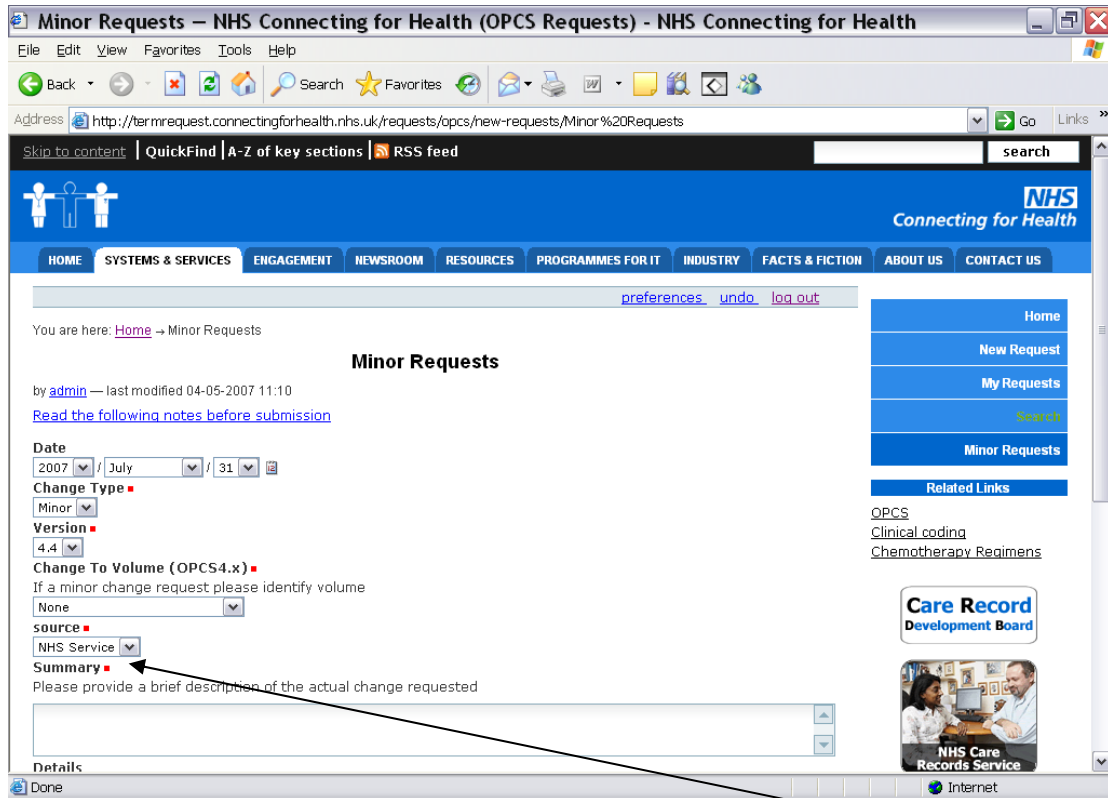
6.2.1 On the home page click on the words '[guidance document](#)' to connect to the OPCS-4 Submission Guidelines and for details on the OPCS-4 Editorial Policy - including suitable content for a change request to the classification.

This will open a new window as the OPCS-4 guidance document is available as a downloadable PDF file. (The software to read this document is readily available free from www.adobe.com) You can then save the guidance document to your computer or close the window to return to the [Home](#) page of the OPCS-4 Requests Portal.

6.2.2 Click on [New Request](#) to bring up the request entry screen.



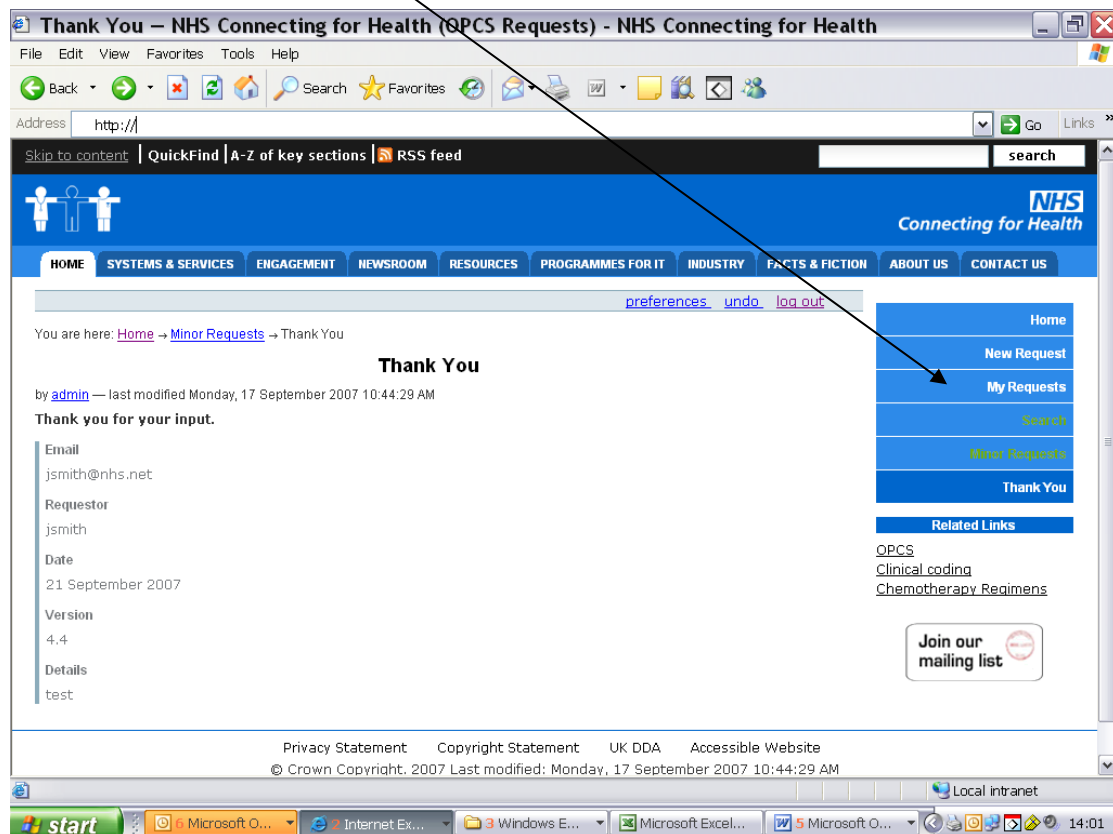
6.2.3 Click on [Minor Request](#) or [Major Request](#) list depending on your requirement. The selected screen will be displayed according to your choice. Please complete all fields as fully as possible in line with the Submission Guidelines (as detailed in Step 6.2.1).



Please enter a concise description of your change in the **Summary** field. This will help your application and enable the NHS Classifications Service to understand the substance of your change request more effectively.

6.2.4 Click the **Submit** button at the end of the fields to send-in your request and the **Thank You** screen (as shown below) will be displayed.

Tip: Click on **My Requests** if you want to review your request and associated Unique Identifier number (UID). Each request is issued with an UID.



6.2.5 If you wish to submit more than one request, click on **New Request** again, choose from **Minor or Major** and repeat the steps above.

6.3 Tracking your submissions

6.3.1 The OPCS-4 Requests Portal enables you to track your submissions for change requests. It also enables requesters to supply further information, if requested by the NHS Classifications Service authoring team, via the **My Requests** facility.

You can see a brief summary of your request and the associated status so you can track the progress of your request. The Unique Identifier number (UID) issued with every new request will be used to track your submission and it must be quoted in any communications with us. Please refer to the

Submission Guidance document for more detailed information on submitting additional information.

To access a summary of your requests made go through the following steps:

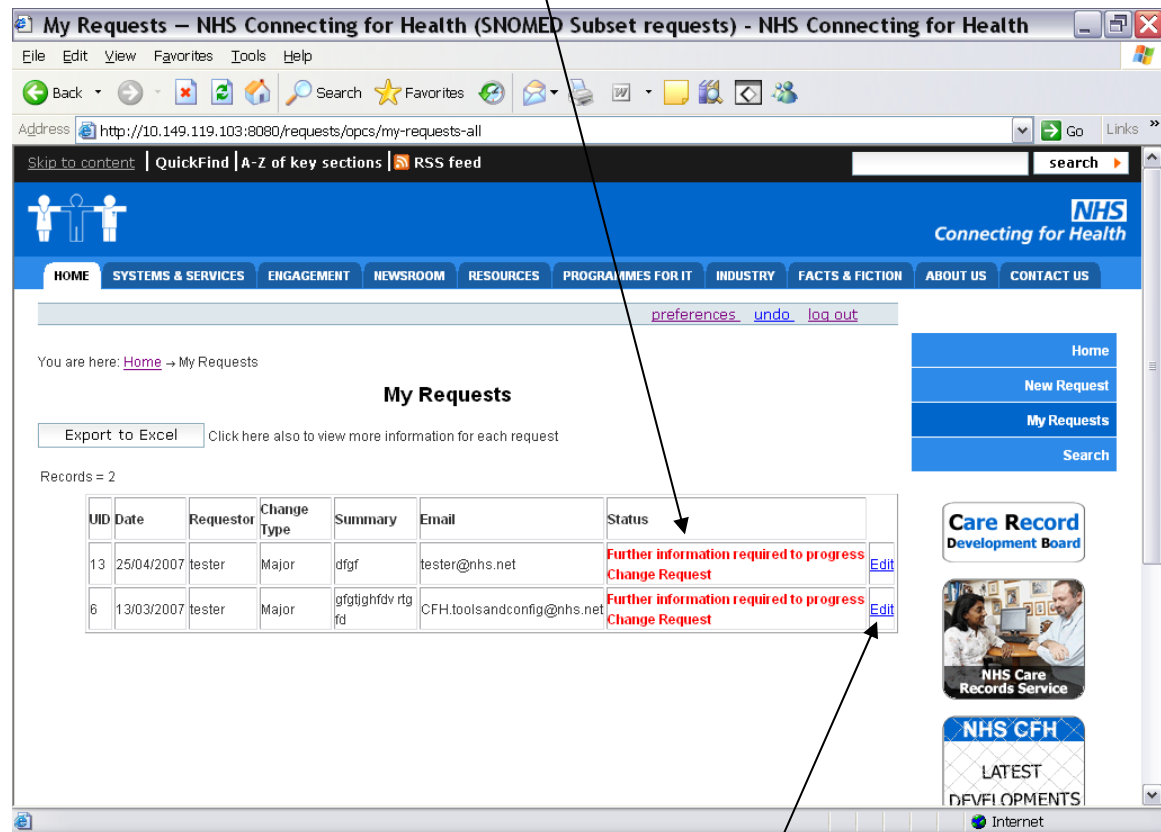
- Click on **My Requests** to go to the screen below
- Click on **Export to Excel** to view the full details of your submission(s)

UID	Date	Requestor	Change Type	Summary	Email	Status
79	21/09/2007	jsmith	Minor	test	jsmith@nhs.net	OPCS-4 Change Request to be evaluated

If you would like to save the Excel spreadsheet to your local computer for ease of access, we recommend the following steps:

- Once the spreadsheet is open, click on **Save**. You may be prompted to save the document in a 'tab separated value (TSV)', click 'No' to this alert and you will be prompted to select the location on your computer for the spreadsheet.
- Select the location on your computer where you wish to save the document and click on Save. Remember to rename the file according to recommended Microsoft guidelines. For further assistance on the use of Excel in your local systems please contact your local IT Support.

6.3.2 The NHS Classifications Service may respond with **Further information required to progress change**. This status will be highlighted in red as shown on the screen below.



The screenshot displays the 'My Requests' page in a web browser. The browser title is 'My Requests – NHS Connecting for Health (SNOMED Subset requests) - NHS Connecting for Health'. The address bar shows 'http://10.149.119.103:8080/requests/opcs/my-requests-all'. The page features a blue header with the NHS logo and navigation links. Below the header, there are links for 'preferences', 'undo', and 'log out'. The main content area is titled 'My Requests' and includes an 'Export to Excel' button. A table with 2 records is shown, with columns for UID, Date, Requestor, Change Type, Summary, Email, and Status. The status for both records is 'Further information required to progress Change Request', which is highlighted in red. An 'Edit' button is visible next to each row. On the right side, there are buttons for 'Home', 'New Request', 'My Requests', and 'Search', along with promotional banners for 'Care Record Development Board', 'NHS Care Records Service', and 'NHS CFH LATEST DEVELOPMENTS'.

UID	Date	Requestor	Change Type	Summary	Email	Status	
13	25/04/2007	tester	Major	dfgr	tester@nhs.net	Further information required to progress Change Request	Edit
6	13/03/2007	tester	Major	gfgtighfdv rtg fjd	CFH.toolsandconfig@nhs.net	Further information required to progress Change Request	Edit

To provide the additional information, click on the **Edit** button alongside status. A page displaying your request will open. Please add the additional information and press the **Submit** button.

6.3.3 If your request for change is declined, the reason will be shown underneath the **Status** as shown, see below.

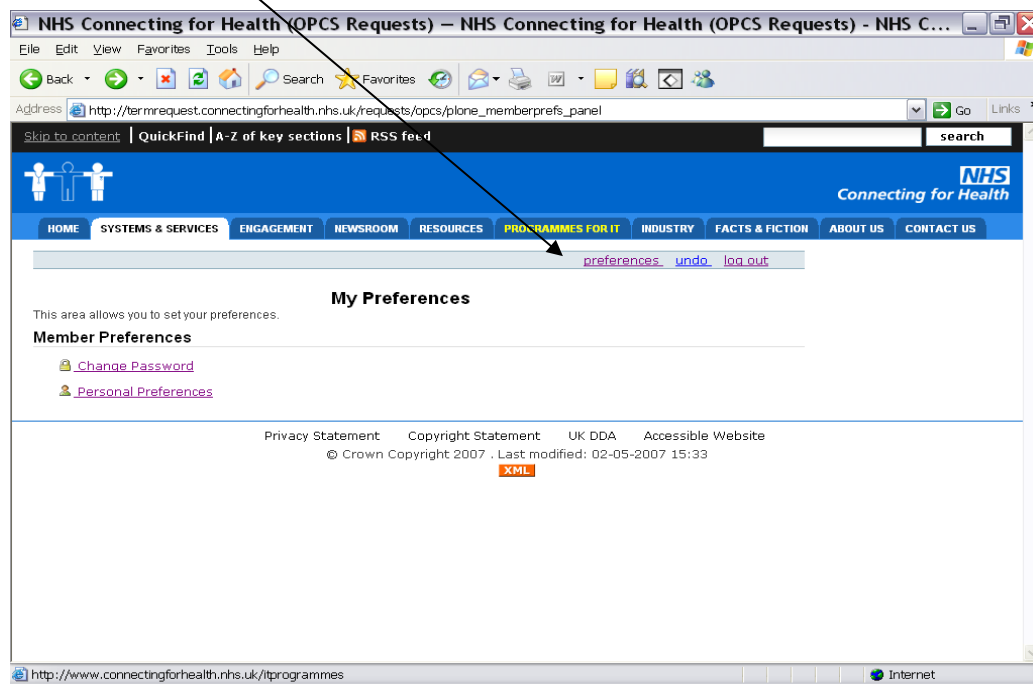
The screenshot shows a web browser window titled "My Requests - NHS Connecting for Health (OPCS Requests) - NHS Connecting for Health". The browser address bar shows "http://". The page header includes the NHS logo and navigation links: HOME, SYSTEMS & SERVICES, ENGAGEMENT, NEWSROOM, RESOURCES, PROGRAMMES FOR IT, INDUSTRY, FACTS & FICTION, ABOUT US, CONTACT US. Below the header, there are links for "preferences", "undo", and "log out". The main content area is titled "My Requests" and includes an "Export to Excel" button. A table displays one record with the following data:

UID	Date	Requestor	Change Type	Summary	Email	Status
79	21/09/2007	jsmith	Minor	test	jsmith@nhs.net	Change Request declined The request is more appropriate for Helpdesk submission

An arrow points from the text above to the "Status" column of the table. The status text is "Change Request declined" followed by "The request is more appropriate for Helpdesk submission". The page footer contains links for "Privacy Statement", "Copyright Statement", "UK DDA", "Accessible Website", and "RSS feed". The Windows taskbar at the bottom shows the start button and several open applications including Microsoft Office, Internet Explorer, and Windows Explorer.

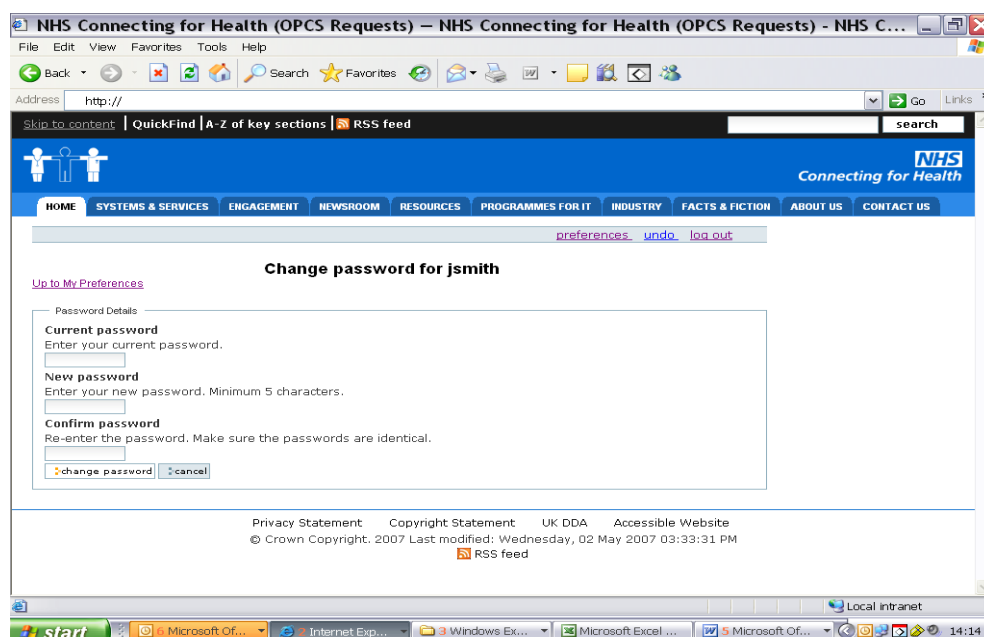
6.4 Managing your account

6.4.1 If you would like to change your password or other personal details click on **Preferences** situated in the light blue bar at the top of the screen.



From the **My Preferences** page you will be given the option to **Change Password** or amend your **Personal Preferences**.

Press the **Change Password** link to bring up the screen to change your password, as seen in the example below.



The **Personal Preferences** screen gives you the options to amend your other personal details as seen in the screen below:

The screenshot shows a web browser window titled "NHS Connecting for Health (OPCS Requests) - NHS C...". The address bar shows the URL: http://termrequest.connectingforhealth.nhs.uk/requests/opcs/personalize_form. The page content is titled "Personal Preferences" and includes the following sections:

- [Home](#)
- [Up to My Preferences](#)
- Your personal settings.
- Personal Details
 - Full Name**
 - E-mail**
 - Job Title**
 - Telephone Number**
 - Fax Number**
 - Address**
 - Postcode**
 - Location**
Your location - either city and country - or in a company setting, where your office is located.
 - Language**
Your preferred language.
Language neutral (site default)
 - Biography**
A short overview of who you are and what you do. Will be displayed on the your author page, linked from

The browser's taskbar at the bottom shows several open applications, including "Microsoft Office", "OPCSdraft.doc", "OPCS-4 request...", "a_requesting u...", and "NHS Connecting ...". The system clock shows 12:00.