# On-line Blood Ordering System

Welcome to NHS Online Ordering System	Blood	Username	
***Welcome to OBOS LIVE*** Have you visited the Hospitals & Science we information, updates, monthly communications and much more. Follow the for the transfusion community. Do you have any feedback, comments or id website? If so send OBOS ideas to OBOS@nhsbt.nhs.uk or website to NH	link below to find out what's available eas on how to improve OBOS or the	Password	Forgotten password?  Log in
Hospital and Science Website	NHS Blood and Transplant		For support please contact your administrator 8

## Learning Objectives

- By the end of this session you will be able to:
  - Log on to OBOS
  - Create an order
  - Preview an order
  - Create an emergency order
  - View the status of orders
  - Create a standing order
  - Search OBOS
  - Reconcile an Order
  - Recover a forgotten password
  - Create a new user and account management

## Logging on to OBOS

Welcome to NHS Online Ordering System	Blood	Username	
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#### **IMPORTANT**

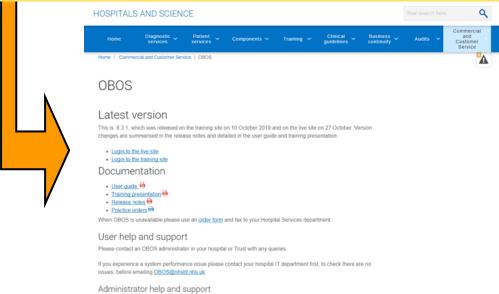
How you log on informs OBOS of who you are (and where you are) – you will use the same log-in for linked hospitals (from the same Trust) but different log-ins for separate hospitals.

#### The Welcome Screen

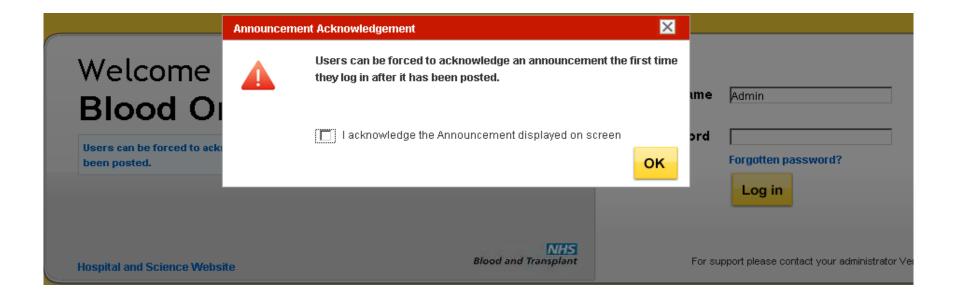
 Direct link to the Hospital & Science website

This OBOS
 presentation,
 release notes,
 user guide,
 product portfolio
 etc...



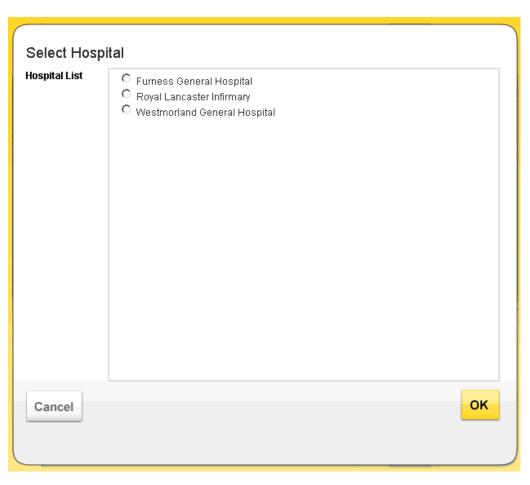


#### Logging In

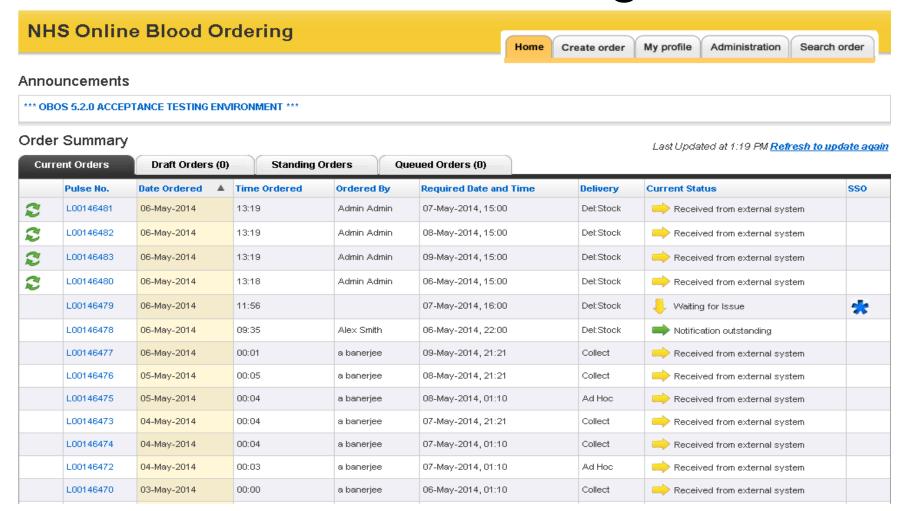


 If an announcement has been posted users will need to acknowledge before entering the system. This is required only once per new announcement.

#### Select Hospital



- Users with more than one hospital (set up on their account) will be asked to select which one they wish to order for
- Users with access to only one hospital or with a hospital set as default will be taken directly to the home page



Home Create order My profile Administration Search order

- The tabs will indicate where you are in OBOS
- The page you are on will be coloured gold

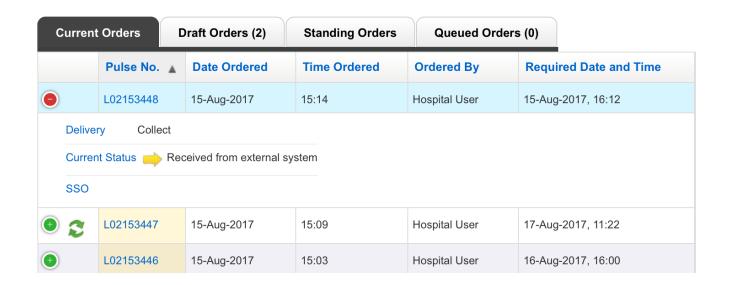
	Pulse No.	Date Ordered ▲	Time Ordered	Ordered By	Required Date and Time	Delivery	Current Status	SSO
2	L00146481	06-May-2014	13:19	Admin Admin	07-May-2014, 15:00	Del:Stock	Received from external system	
2	L00146482	06-May-2014	13:19	Admin Admin	08-May-2014, 15:00	Del:Stock	Received from external system	
2	L00146483	06-May-2014	13:19	Admin Admin	09-May-2014, 15:00	Del:Stock	Received from external system	
2	L00146480	06-May-2014	13:18	Admin Admin	06-May-2014, 15:00	Del:Stock	Received from external system	
	L00146479	06-May-2014	11:56		07-May-2014, 16:00	Del:Stock	- Waiting for Issue	*
	L00146478	06-May-2014	09:35	Alex Smith	06-May-2014, 22:00	Del:Stock	Notification outstanding	
	L00146477	06-May-2014	00:01	a banerjee	09-May-2014, 21:21	Collect	Received from external system	

 The homepage consists of order summary screens for current, draft, standing and queued orders.



- The top line contains information on your name and the hospital you are currently viewing or placing orders for.
- The Log Off facility is also on this line.
- If your account allows you access to more than one hospital site then to change the hospital you are viewing orders from or placing orders for click on change and the selection of hospitals available to you will appear.
- Select the correct hospital and click on OK.

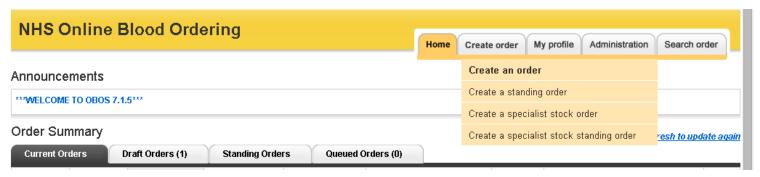
 When using mobile devices, the screen size will depict the lay out. Columns can be expanded and collapsed using the and buttons.



# Creating an Order

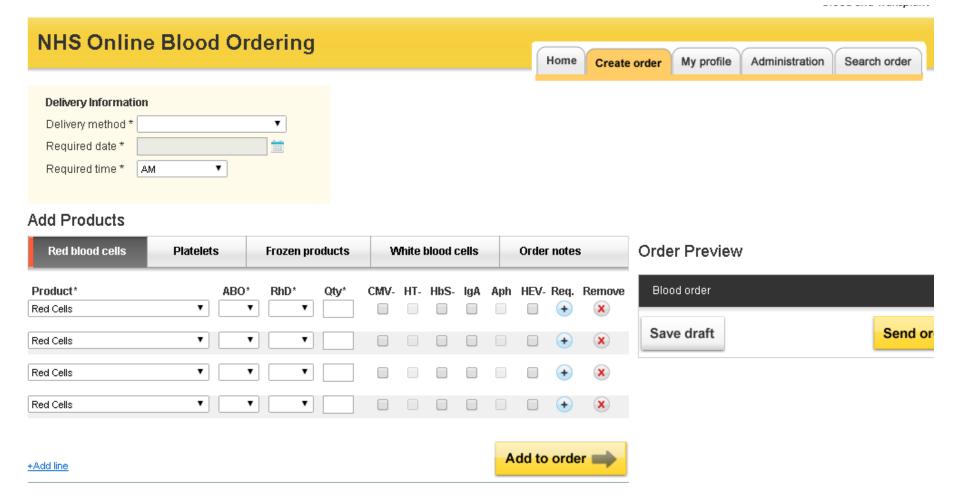
Home Create order My profile Administration Search order

#### Creating an Order



- To create an order click on the Create order tab
- You will be given a choice:
  - Create an order/specialist stock order
    - A one off order (which can be duplicated if required)
  - Create a standing order/specialist stock standing order
    - An order containing the same components which can be repeated either weekly/alternate weeks, on one or more days

## The Ordering Screen

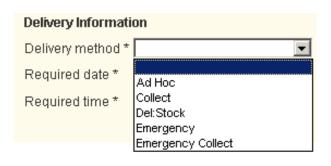


# The Ordering Screen

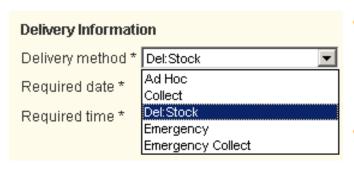
#### Add Products

Red blood cells	Platelets	Frozen products	White blood cells	Order notes
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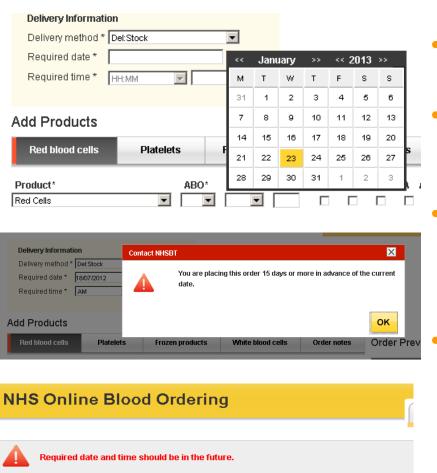
- On the create an order screen there are 5 tabs across the screen – one for each of the product types and one for 'Order notes'.
- The product tabs allow an individual product type to be ordered.
- 'Order notes' allow general comments to be added to the whole order. Not for product specification requirements.



- Select delivery type from the drop down menu (default setting is blank)
- Del Stock is your routine round you receive from NHSBT.



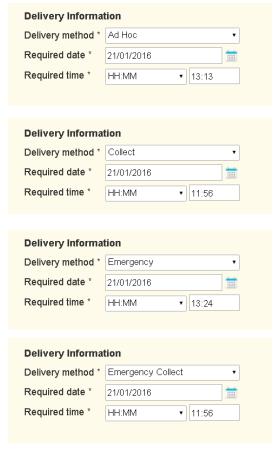
- Only needs to be selected once per order not for each product
- Caution: Only a few Trusts use the emergency collect option

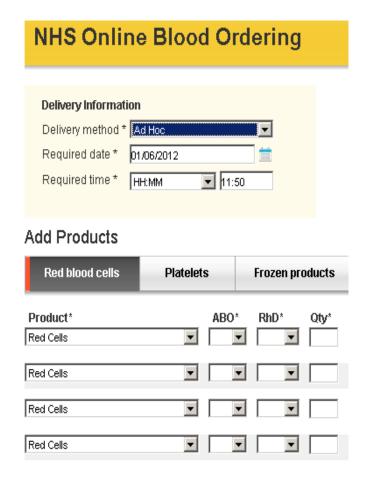


- Required Date
- Select delivery date from the drop down calendar
- A pop up box appears if you place an order 15 days or more in the future
- Note: If you select a date in the past OBOS will inform you when you try and place the order (and will not accept the order)

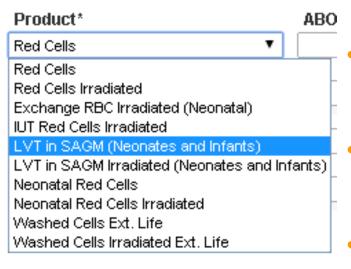


- When selecting Del:Stock the system will present the delivery slots available showing your delivery times as stated in your SLA.
- For Adhoc/collect/emergency and emergency collects the times will be calculated in accordance with your SLA times.
- These times can be manually changed if the quoted time does not suit.

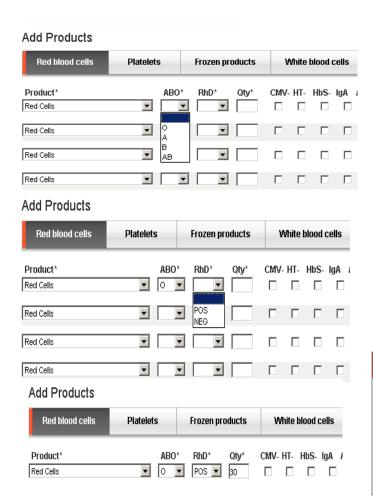




- Once you have entered all of the delivery details, check them
- OBOS will send the order to NHSBT with these details (Ensure no details are inadvertently changed using the mouse scroll wheel)
- OBOS will only send the order once components have been added and send order is selected

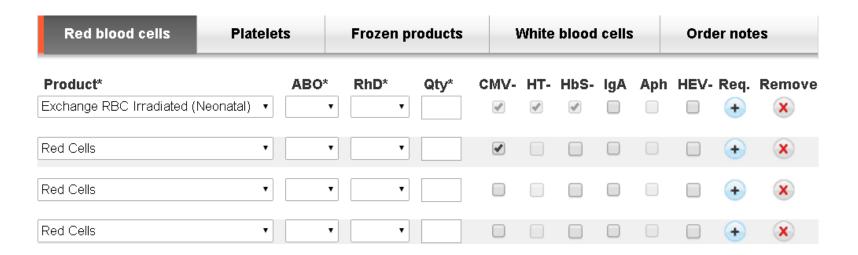


- On the Red blood cell tab the default product is standard red cells.
  - To select different red cell products use the drop down menu.
- Irradiated components appear on the product lists.
- Select the type of product you require by clicking on it
- Ensure no details are inadvertently changed using the mouse scroll wheel

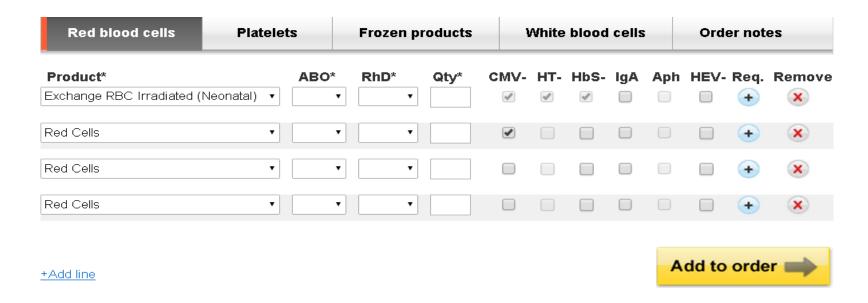


- Select the ABO group from the drop down menu
- Select RhD pos or neg
- Enter Qty required (a pop up box will appear for orders over 30 units)



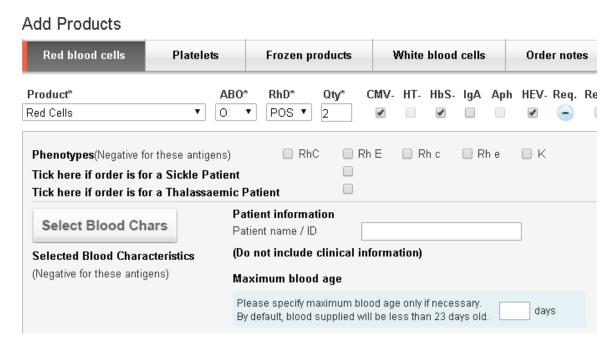


- Any special requirements? Use the tick boxes.
- Do not use the line/order notes for special requirements.
- Certain components will automatically select additional requirements.



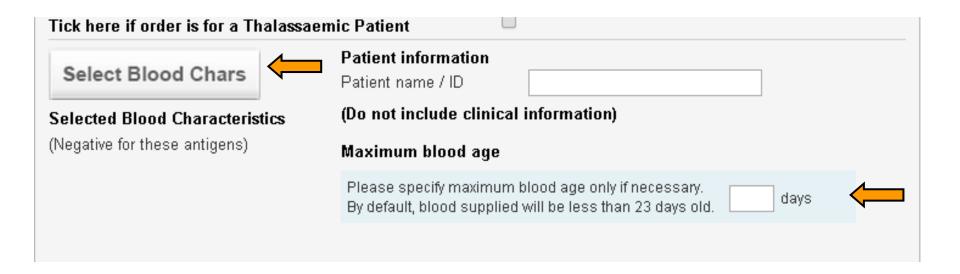
- If more then four types of red cells are required additional lines can be added by clicking the <u>+Add line</u> icon.
- If phenotyped units are required click on the icon in the Req. column.

#### Phenotyped Red Cells



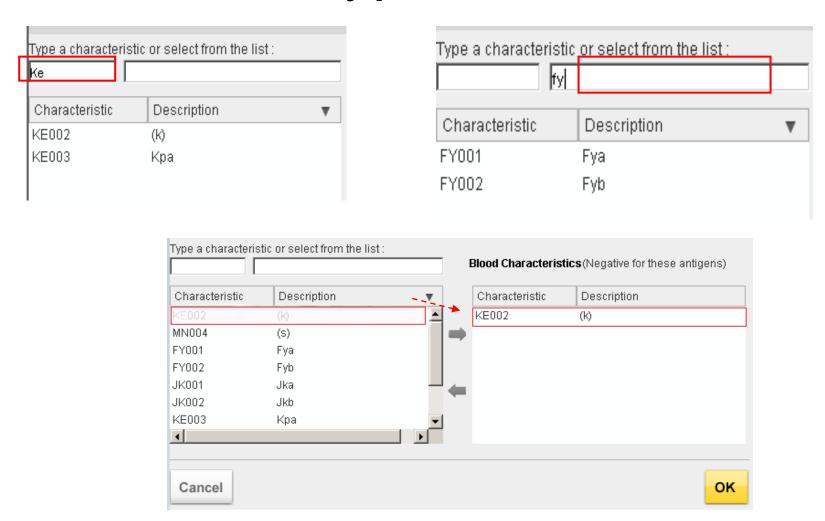
- Ordering Rh and K neg units.
- Enter the patient ID
   (NHS number or surname or hospital number or left blank
   depending on Trust policy)

#### Phenotyped Red Cells



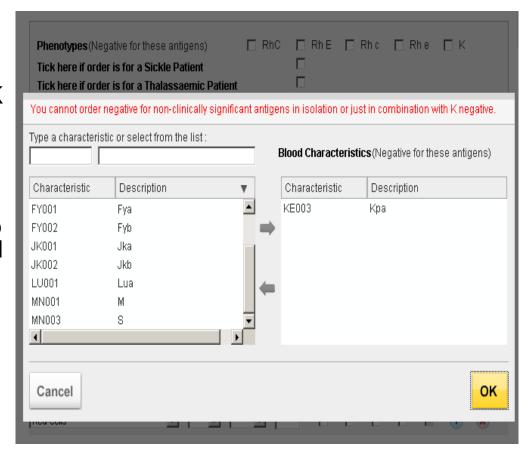
- To order additional phenotypes press the 'Select Blood Chars' button.
- If red cells of a specified maximum age are required enter the maximum age in the appropriate box

#### Phenotyped Red Cells

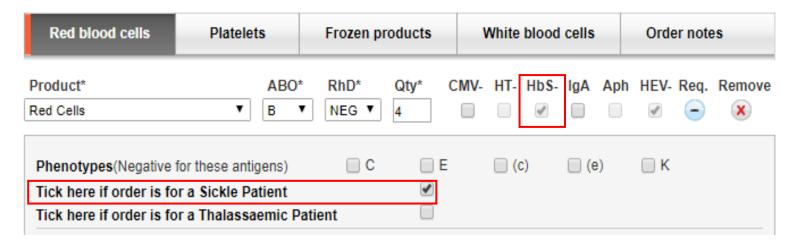


#### In Isolation Rule

- Certain antigen negative specificities can not be ordered in isolation. e.g. Kp(a), Lu(a), Cw if selected in isolation or just in combination with K (Kell) the user will see the advisory notice.
- The specificity will need to be selected he left hand pane, then click the icon to move it across to the right han ne, repeat if needed
- Then press to continue.
- (\*Phenotypes contained within the characteristic table can be added or deleted by NHSBT but will only be done after consultation and agreement with hospital representatives that form part of the OBOS stakeholders group)



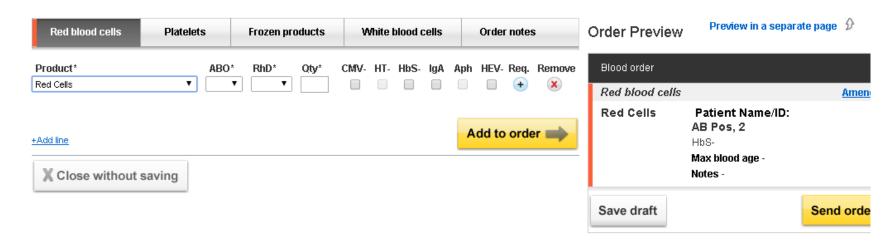
# Haemoglobinopathy Patient?



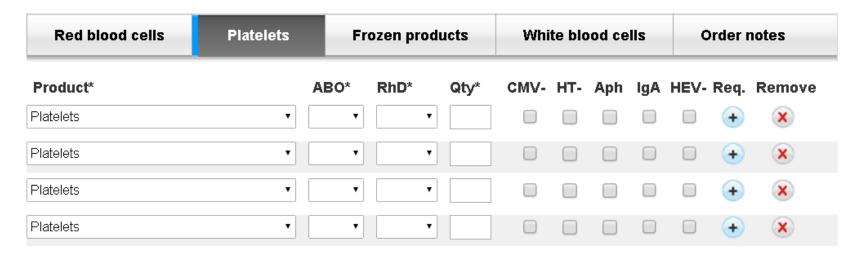
- This is a non mandatory question but it will enable NHSBT to gather information on the patient types additional phenotypes are ordered for.
- Ticking 'Sickle Patient' will automatically select HbS neg units and the user will be unable to untick the HbS- box whilst the Sickle Patient box is ticked.

#### Red blood cell order complete?

- Enter all the red cell components required and then click on the Add to order button.
- The red cell components required will then be displayed on the right hand side of the screen under the Blood order heading.

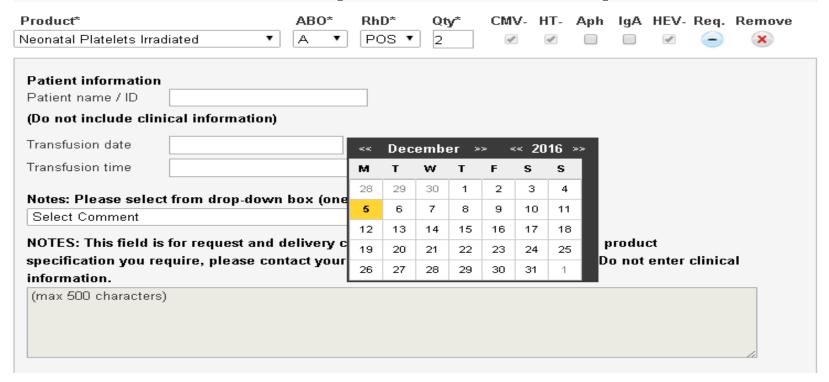


## Ordering Platelets



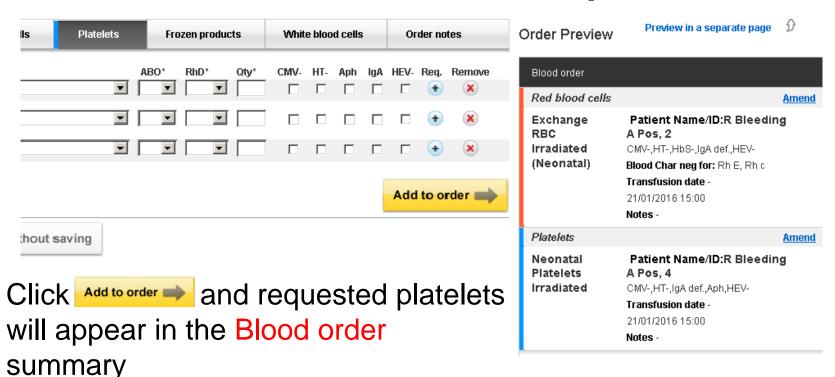
- Enter requests for platelets in similar manner.
- Selecting the icon in the Req column to enter a patient ID and transfusion date and time if the platelets are non stock platelets.
  - These are not mandatory but will help effective supply and demand.

#### Platelets - Special Requirements



- If you enter a date you must enter a time and vice versa
- The time of transfusion should be as accurate as possible especially for components with a 24 hour shelf life such as platelets in PAS.

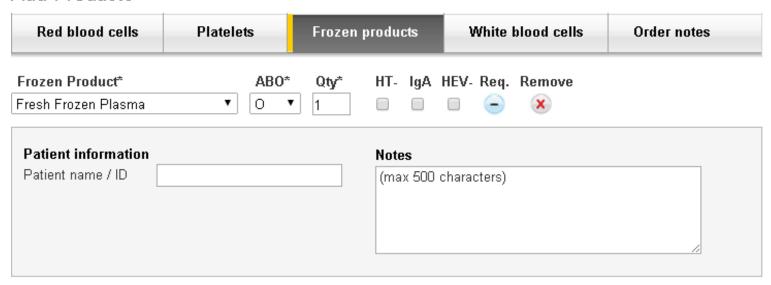
## Platelet Order Complete?



 Your Blood order will contain anything you have set up on this occasion, be it one unit of platelets or twenty different blood components – each new addition will be "added to the list"

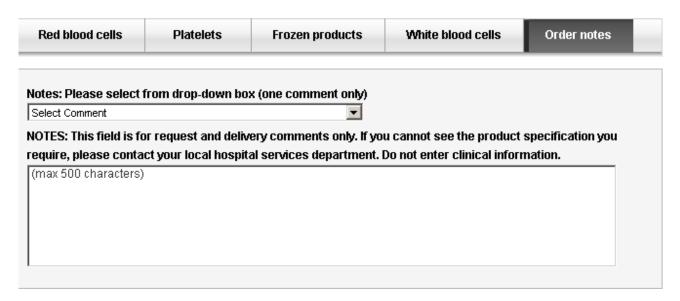
# Ordering FFP

#### Add Products



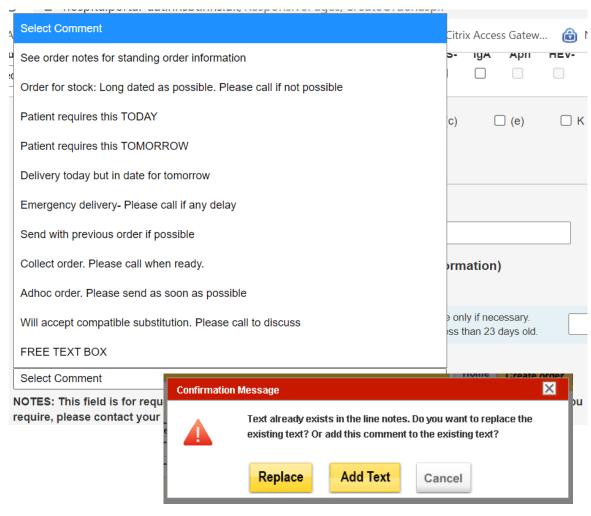
 FFP is ordered in the same way, although there is no requirement to enter an Rh type and the requirements box just contains space for patient information if required and notes

#### Line and Order Notes



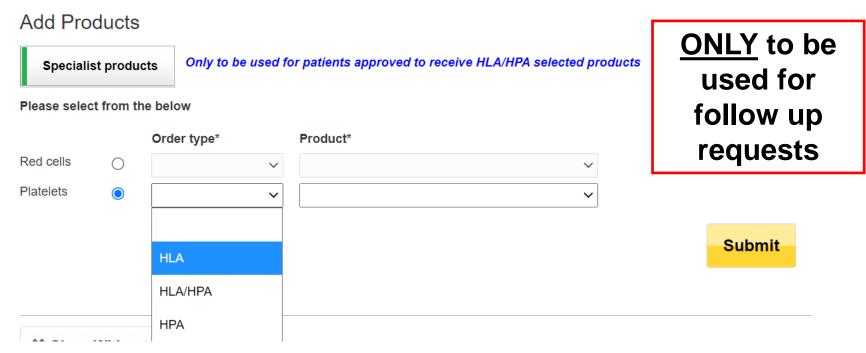
- Free text note sections for individual and overall orders should only be used for supporting information.
- Product characteristics such as phenotype requirements and transfusion dates should not be placed in these fields. Please use the tick boxes and dedicated fields for such requirements

#### Line and Order Notes



- The comment can be amended or if appropriate an additional comment can be added.
  - If changes are required once added to the order select amend and the details will move to the left hand side of the screen.
  - -Select the changes required and the options to 'Replace' the comment or 'Add Text' to add additional comment (s) will be displayed.

## Specialist Stock Orders

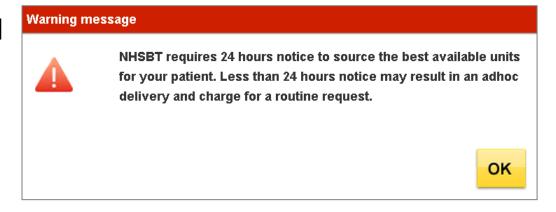


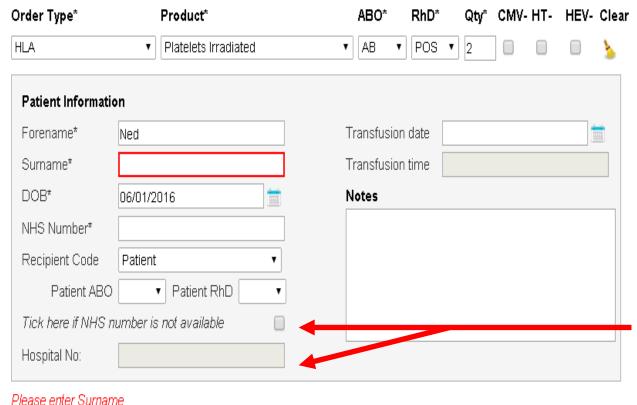
- Select product type. Only one type of product per order
- Select order type (HLA matched, HLA/HPA matched or HPA matched

#### Specialist Stock Orders

# Add Products Only to be used for patients approved to receive HLA/HPA selected products Please select from the below Red cells Platelets HLA HLA SELECTED PLATELETS ONE ADULT DOSE HLA SELECTED PLATELETS ONE ADULT DOSE HLA SELECTED PLATELETS ONE ADULT DOSE IN PAS Submit

- Select the product required
- Submit order
- After reading the advisory message select OK





- Add the product requirements
- Complete the Patient information
- Any mandatory field (\*) will be highlighted if missed off the order
- NHS number is preferred but if not available check the tick box and enter a hospital number

Mandatory fields are marked \*: Product, ABO, RhD, Qty, Fore/Surname, DOB, NHS or Hospital number



- Recipient Code, Patient ABO, Patient RhD fields are not mandatory
- But are required details when requesting products for a neonate or foetus without the mandatory details of their own, but use the mother's details instead.

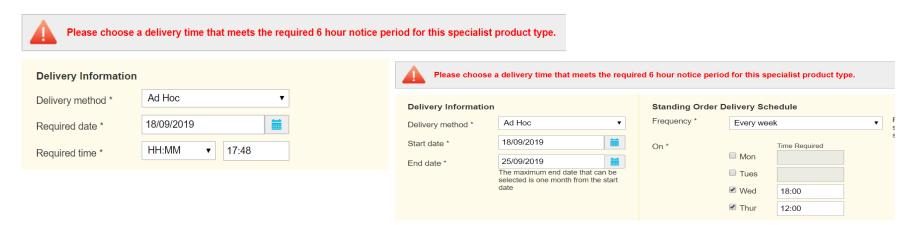


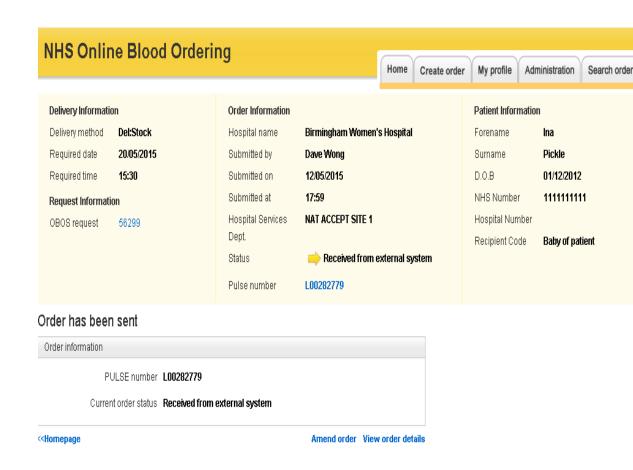
- When your order is complete 'Add to Order' will move the details over to the right hand side allowing you to 'Send Order'.
- When the order is sent the advisory message will appear, click
   ok to continue

OBOS will alert users that there is insufficient notice time if an order is placed with less than 24 hours' notification and request the day/time is adjusted before the order can be submitted.

If orders are required with less than 24 hours' notice, please our specialist platelet service to discuss on 020 895 72814

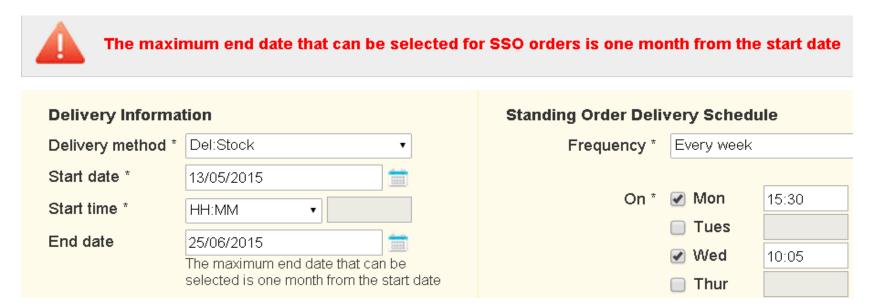
Emergency orders will not change. Please contact your local Hospital Service department when placing an emergency order.





- Once an order has been sent it will appear in the current orders tab on the home page between 0 and 14 days before the delivery date dependent on the local configuration.
- It will not appear on the home page in advance of 14 days.

## Specialist Stock Standing Orders



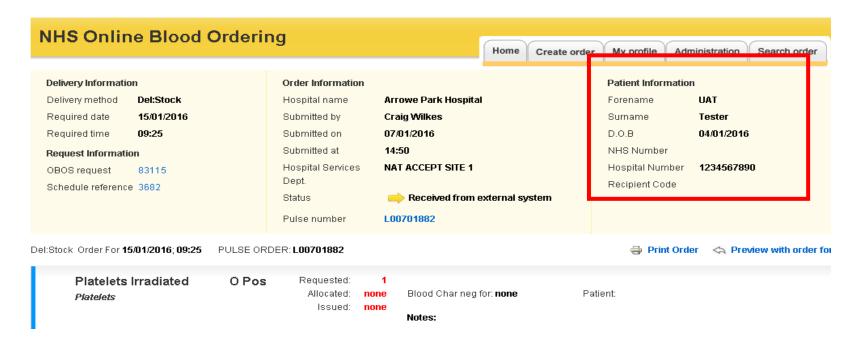
#### The only difference with SSO standing orders is:

- The additional patient information will be requested as in a normal specialist stock order described above.
- Due to the need to review all patients and treatment effectiveness the end date for specialist stock standing orders can not be more than one month from the start date.

Order Summary						Last Updated at 1:24 PM Refresh to update again	
Current Orders Draft Orders (0) Standing Orders Queued Orders (0)							
Pulse No.	Date Ordered	Time Ordered	Ordered By	Required Date and Time	Delivery	Current Status	sso ▼
L00146479	06-May-2014	11:56		07-May-2014, 16:00	Del:Stock	Waiting for Issue	*
L00146045	02-May-2014	09:07		05-May-2014, 12:00	Collect	Awaiting allocation (external)	
L00139565	01-May-2014	15:44	Admin Admin	01-May-2014, 22:00	Ad Hoc	Awaiting allocation (external)	

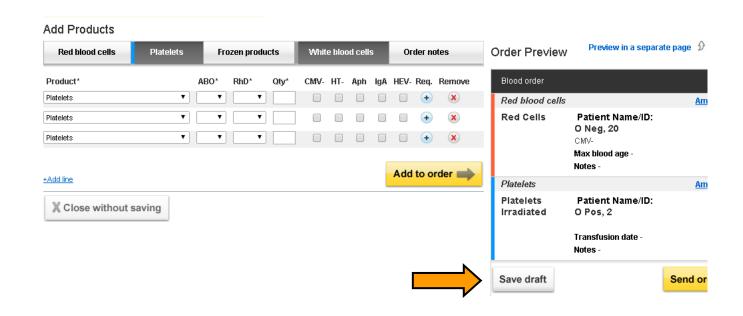
- From the home page it is possible to track the progress of Specialist Stock Orders, indicated by the 'SSO' column and the icon.
- This column can be ordered so that all Specialist Stock Orders appear at the top of the list.

## Tracking Specialist Stock Orders



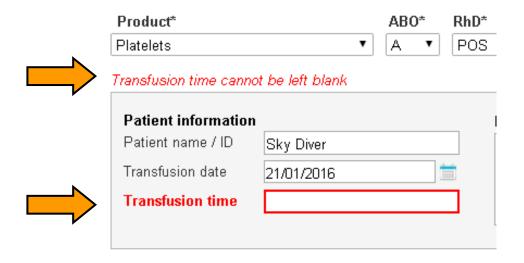
- Clicking on the SSO icon/ Pulse number will take you into a read only screen.
- Patient information will be visible in the upper right hand pane where available.

#### **Draft Orders**



- The order can be saved as a draft order at anytime by clicking on the 'save draft' button – NHSBT cannot view draft orders.
- The order is only submitted to NHSBT for processing when the send order button is clicked.

## Required Fields

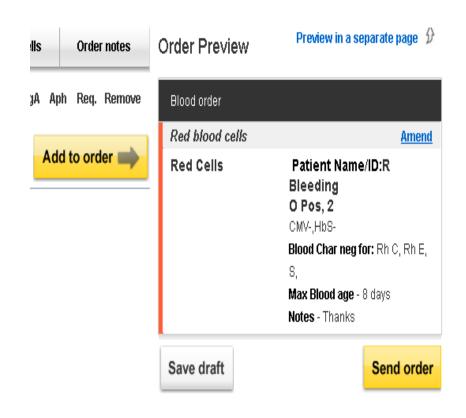


- Failure to complete a required field will be highlighted in red and a prompt displayed.
- You should complete the missing information and resubmit the order by clicking on the 'send order' button.
- Remember if you need to leave the order to find additional information the order can be saved to draft at anytime.

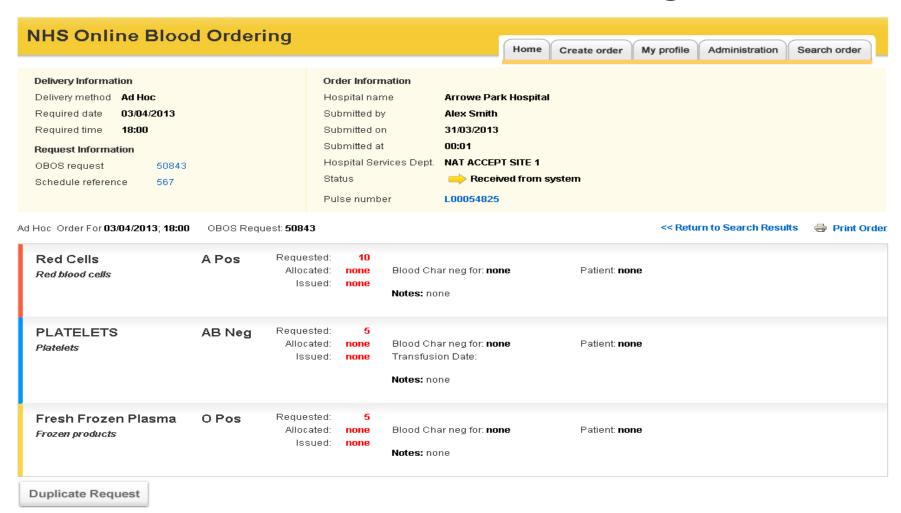
## Submitting the order

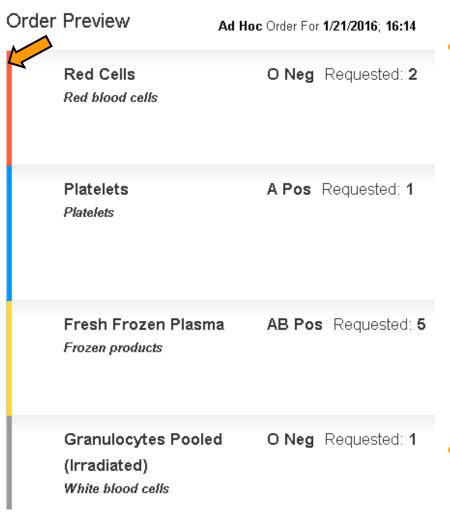
 When the whole order is complete click send order to submit the order to NHSBT.

Or



## Order Preview Page

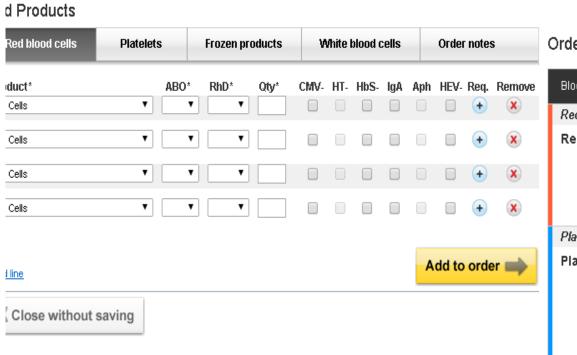




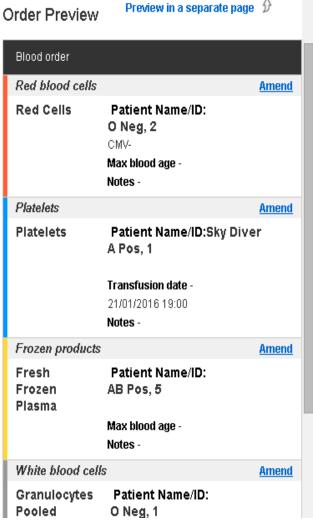
- Note on the left hand side:
  - Orders with a red stripe are for red cell components
  - Orders with a blue stripe are platelet components
  - Orders with a yellow stripe are frozen components
  - And Orders with a grey stripe are white cell components.
- This is to make checking the orders easier.

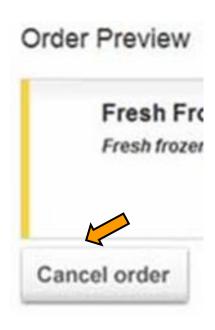


- Once the order has been checked any amendments can be made by clicking on the Amend order button.
- This takes the user back to the create order screens for amendments to be made.



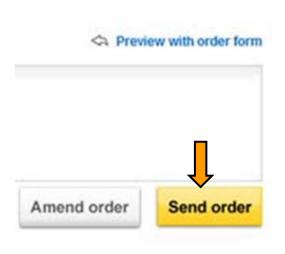
- Once back in the create order screen you can move lines back to the left hand side to change them.
- Clicking on amend moves only the individual component type back.





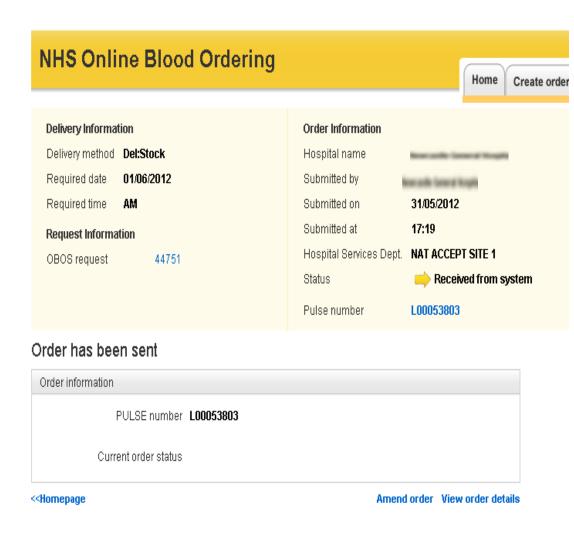
 If the order is no longer required it can be cancelled by clicking on the
 Cancel order button

Users should be aware that this will delete the whole request and any components which are required will need to be re-entered.



- Once the user is happy the request is complete and correct it should be submitted by clicking on the button.
- The order will now be sent to the NHSBT computer issue system PULSE

## Order Queuing



- Once a request is submitted, OBOS displays a screen showing that the order has been submitted.
- If PULSE is operational it will display both the Pulse and OBOS numbers.
- If PULSE is down, it is not possible for the order to be submitted to pulse and the order will be placed in the queued orders list.

### When PULSE is Not Functioning



Your order has not been sent to Pulse due to a communication failure between OBOS and Pulse

If this order is urgent,

Please print this order and fax it to your hospital services dept.

When connection has been re established, the OBOS request number will automatically be recorded in Pulse.

For any amendments to this order in the meanwhile please contact your hospital services dept. directly.

Request number 44970 Preview and print this Order

The queued order will be sent to PULSE when it becomes functional again

- If the order is urgent then you will need to PRINT the order and fax it to the relevant Hospital Services Department
- This is done by clicking on the 'Preview and print this order' link

### If OBOS is Not Functioning

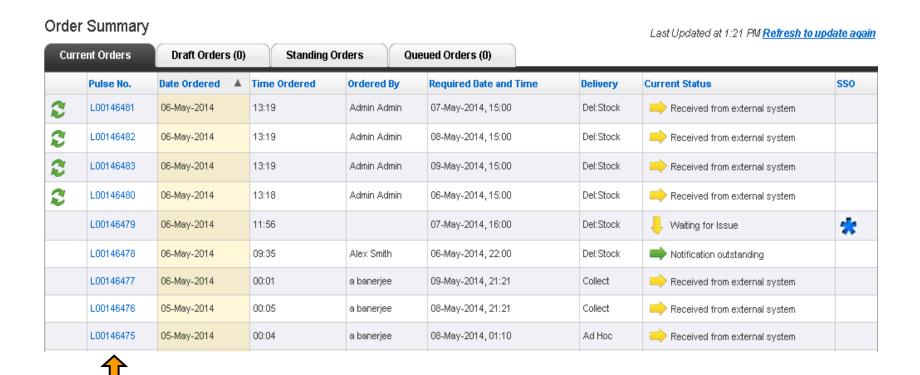
- If you can not place an order using OBOS please use the contingency fax forms for all standard/non-standard form.
- For SSO orders please use the For Specialist Stock Orders please use the following:
  - FRM559 Request for HLA Selected Products -Second and subsequent Orders
  - >FRM609 Request for HPA Selected Blood Products
  - All the above forms can be found on the <u>Hospitals & Science website</u>

#### Order Confirmation



- OBOS will also store information about who placed the order and when.
- The PULSE number is the NHSBT way of recognising your order.
- If you have any queries about the order then having this number will help NHSBT staff locate your order.

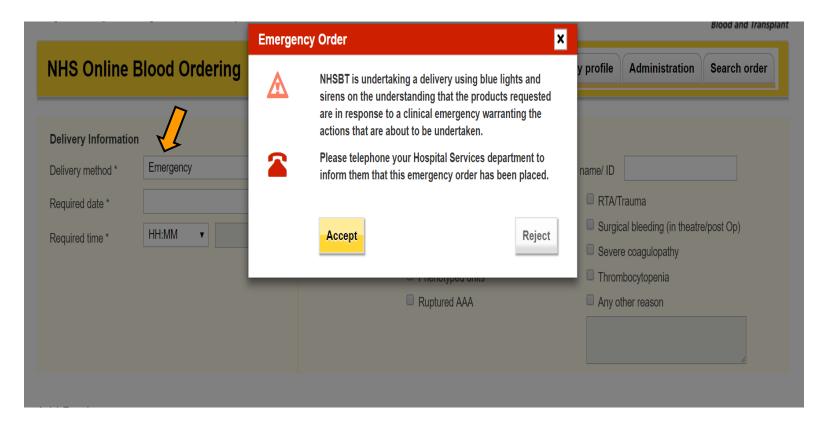
## Reviewing an Order



Orders can be reviewed by clicking Pulse number on the left.

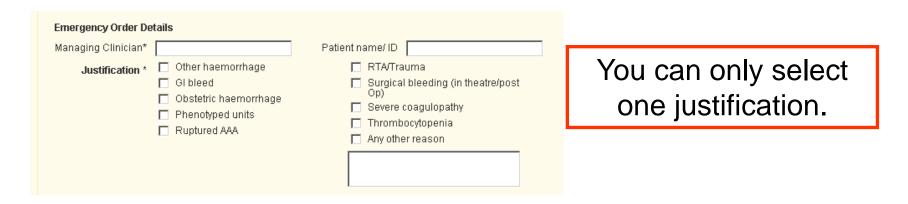
# Emergency Orders

## **Emergency Orders**



If you request an emergency delivery, users must accept the conditions shown below to proceed and **must** telephone their Hospital Services department to inform them that the order has been placed.

## **Emergency Orders**



If you require and emergency delivery additional mandatory (\*)
information is required before the order can be submitted.

(Order Summary Screen)

Delivery	Current Status			
Emergency	ン Unfulfilled			
Ad Hoc	Waiting for Issue			
DetStock	Locked by another user			
Ad Hoc	Received from external system			
DeltStock	Awaiting allocation (external)			
DeltStock	Preparation in progress			
DetStock	Awaiting allocation (external)			
Del:Stock	Notification received			
DeltStock	Prepared, Awaiting Dispatch			
DetStock	Notification received			
Ad Hoc	Partially Issued			
DetStock	Notif. outstanding-dispatched			













- Received from external source
  - indicates that NHSBT have received the order and a Pulse order number had been allocated.
- 2. Awaiting allocation
  - indicates that staff at NHSBT have viewed the order, but have not yet allocated specific donations to fulfil the order.
- 3. Waiting for issue
  - indicates that units have been allocated to the order but the order has not yet been prepared.
- Partially issued
  - indicates that some components have been issued but the order is not yet complete.
- 5. Locked by another user
  - indicates that staff at NHSBT are currently viewing the order.
- 6. Preparation in progress
  - indicates that staff at NHSBT are currently issuing components to the order.



7. Prepared awaiting dispatch





8. Notif. Outstanding dispatched

 indicates that the order has been dispatched from NHSBT but the paperwork confirming receipt at the hospital has not been received.



Notification received

 indicates that the paperwork has been received by NHSBT and the process is complete.



Unfulfilled



 no component is available of the type requested and the order has not been completed.

- 11. Awaiting patient link (SSO)
  - indicates H&I staff have viewed the Specialist stock order, but have not yet linked the order to the NHSBT patient record.



- 12. Awaiting assignment (SSO)
  - indicates H&I staff have not yet allocated specific donations to fulfil the order.



- 13. Awaiting authorisation (SSO)
  - indicates H&I staff have not yet submitted the order to be issued.



- 14. To be updated by the hospital
  - indicates the specialist stock order received from OBOS can not be processed. H&I staff have returned the order for it to be amended or cancelled by the hospital.



- Pulse numbers are listed to the left hand side of the screen.
- There may also be an icon in the far left hand column an icon which indicates that the OBOS request:

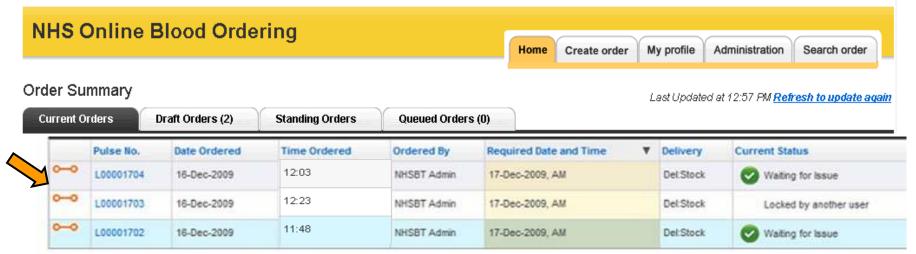


Has been split by NHSBT into multiple Pulse orders.

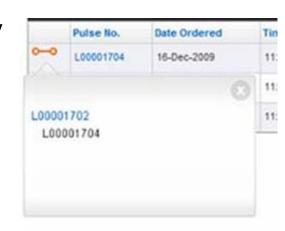


Originated from a standing order

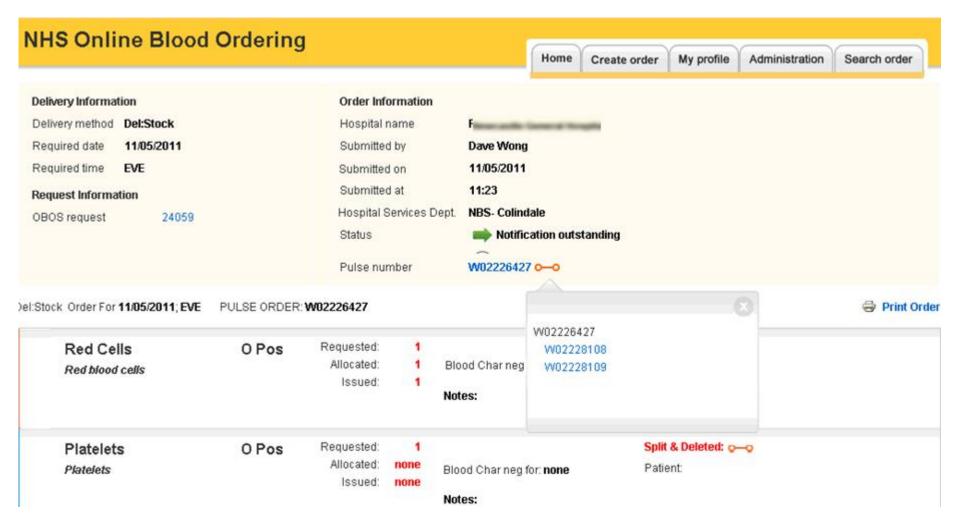
# Split Orders



- The three orders on this screen have been split by NHSBT into several PULSE orders as indicated by the bar on the left hand side of the screen
- By clicking on the pulse number the original order can be viewed
- By clicking on the blue (active) link you can go to that part of the split order.
- The inactive link is the current order.



# Split Orders



## Split Orders

**NOTE:** Users may notice that when an order is split, the details displayed on screen for the part of the order moved to the new split order may display differently.

In the example below the original order shows certain blood characteristics for AB Pos K, E, (c) units



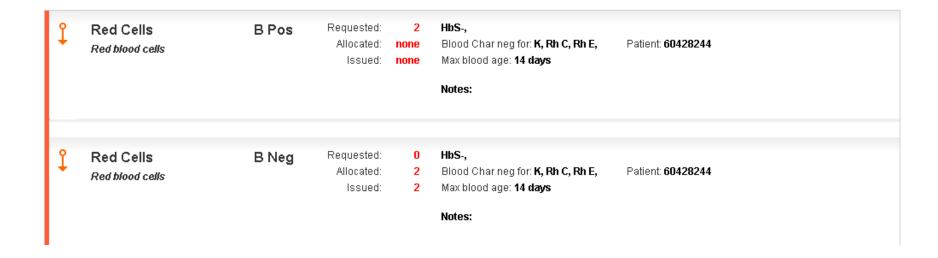
The AB units were split from the original order to a new order as shown below. The K, E, (c) are no longer displayed



These blood characteristics are carried over to the new split order which can be seen by viewing the newly created part of the order, as seen below.

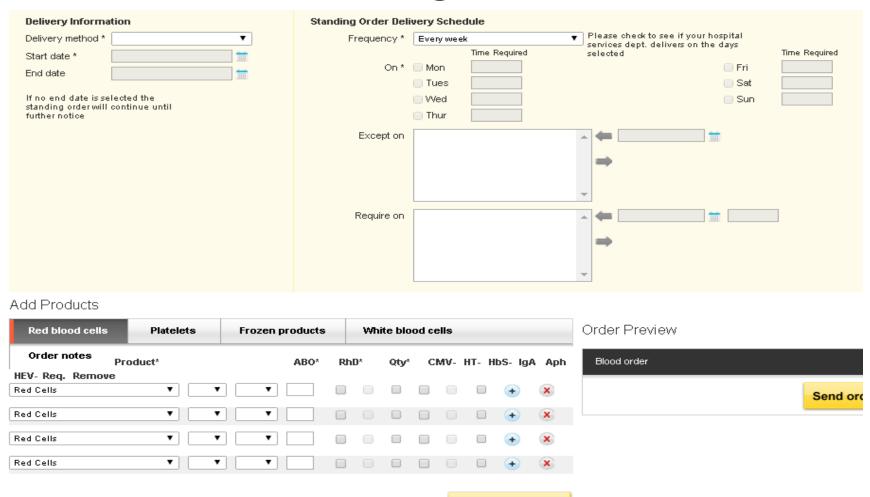


#### Order substitutions



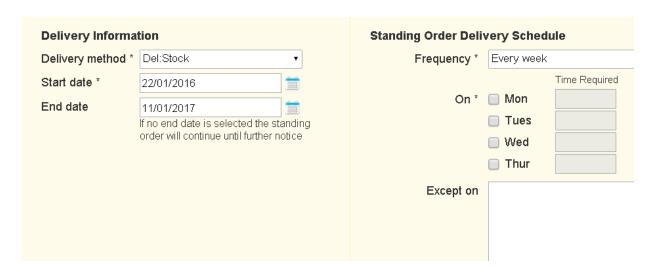
- If NHSBT has to substitute one product /group for another this will be agreed by phone as it is now.
- Substituted lines are indicated by the 

   icon as shown here
   where a B Neg red cell has been substituted for the B pos
   originally requested.

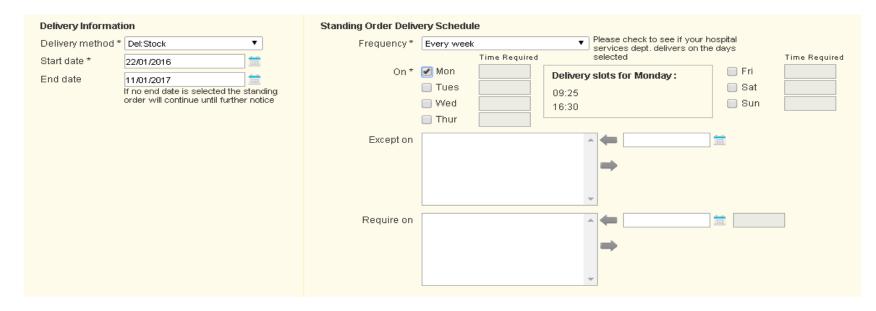


Add to order

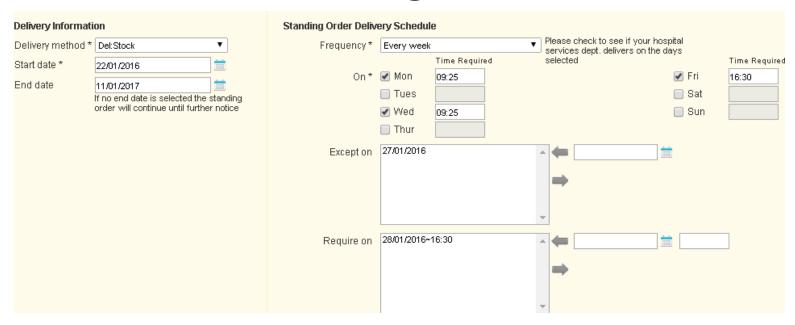
+Add line



- Standing orders have a start date instead of a delivery date.
- There is an option to enter an end date.
- If no end date is entered the order will continue until you instruct it to end.



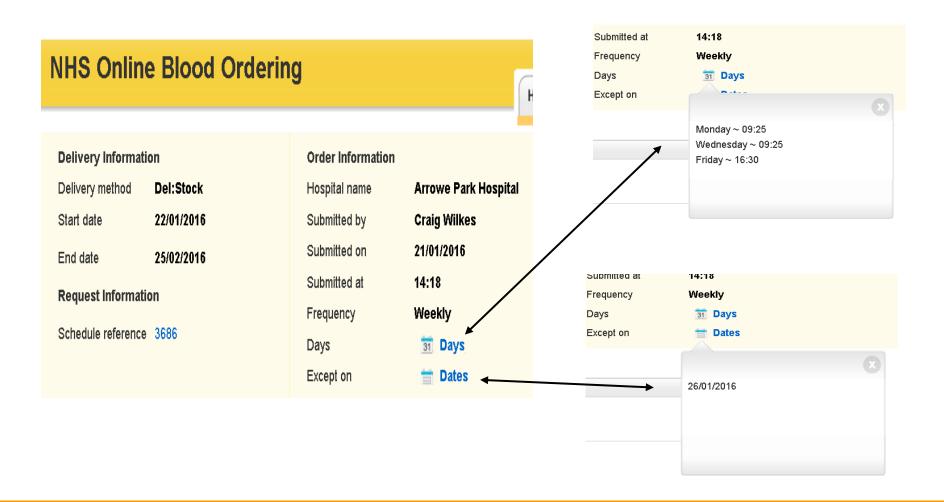
- Then the schedule information is entered and the frequency of the order can be either every week or alternative weeks
- Select days required and the time slots.
- Except on dates can be added either by entering the date (DD/MM/YYYY) or by selecting from the calendar and clicking the left arrow.



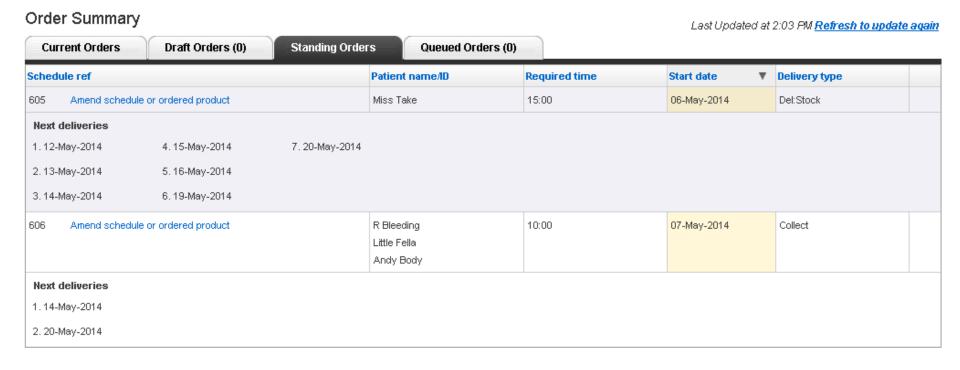
- If you choose the 'except on' date, it allows you to either cancel that individual instance altogether or choose an alternative date (for example, you may want your standing orders each Monday, except on certain bank holidays where you would 'require on' the Tuesday).
- Exclude dates if required.

- Components are then entered in the same way and added to the order.
- Once the order is complete it is submitted by clicking on the Send order button.
- A warning message will show if a standing order date added to the list falls on a Bank Holiday or a weekend – this is to make sure the date is acceptable.
- Standing orders get both a PULSE and individual OBOS number when they move.
- Standing order requests move to NHSBT Pulse eight days before they are due for delivery
- The original standing order reference can be seen by hovering over the icon on the home page.

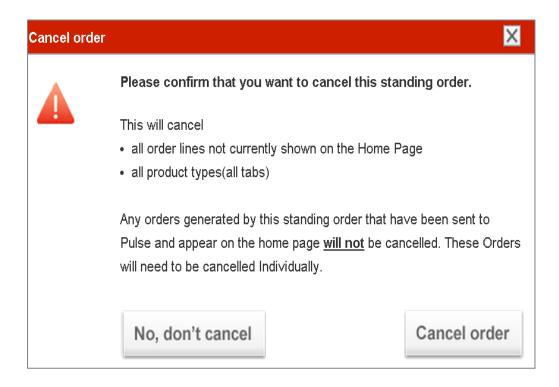
### Standing Order – Confirmation



#### Standing order tab on Home Page



# Cancelling or Amending Orders/Standing Orders

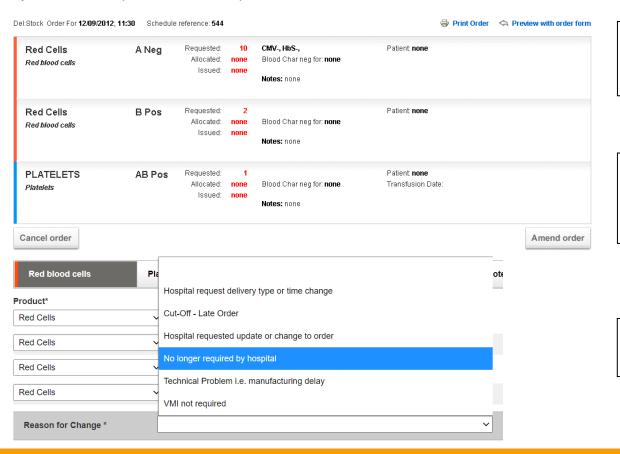


 Standing order schedules must be managed independently of individual instances of standing orders already on the home page.

#### Cancelling Orders

Orders can be cancelled on OBOS up to the point at which NHSBT start to process the request and can be done by accessing the order, selecting 'Cancel order' and following the on-screen instructions.

When the order is being processed the order is locked and the cancel order button will not appear, to cancel please contact your local Hospital Services department.



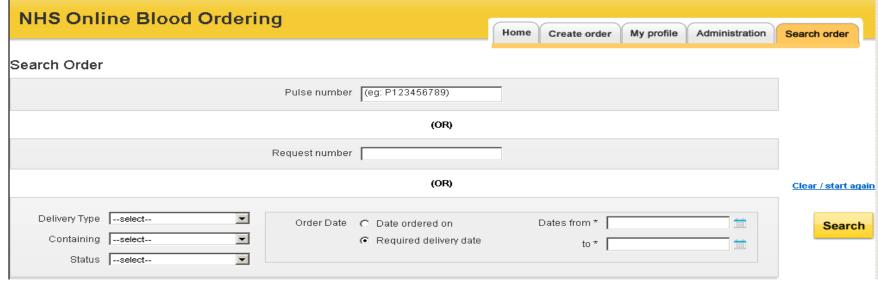
When the order is being processed the order is locked and the cancel order button will not appear, to cancel please contact your local Hospital Services department.

HLA platelet orders are cancelled in the same way as above, should the order be locked please contact the H&I Platelet Desk on 020 895 72814 Mon-Fri 09:00 to 17:00 or your local Hospital Service department at any other times

When cancelling or amending an order the user will be asked to confirm the actions and select a reason for the change.



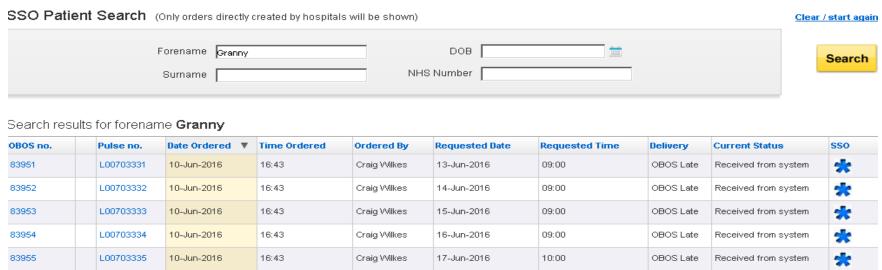
#### Searching OBOS



There are a number of ways to search on OBOS

- The PULSE number if you have it
- The OBOS number (Request number)
- Delivery Type (this includes NHSBT Adhoc-Free option)
- Containing specific product types (platelets, washed red blood cells etc..)
- Status of the request (dispatched, deleted etc..)
- Date ordered on
- Required delivery date

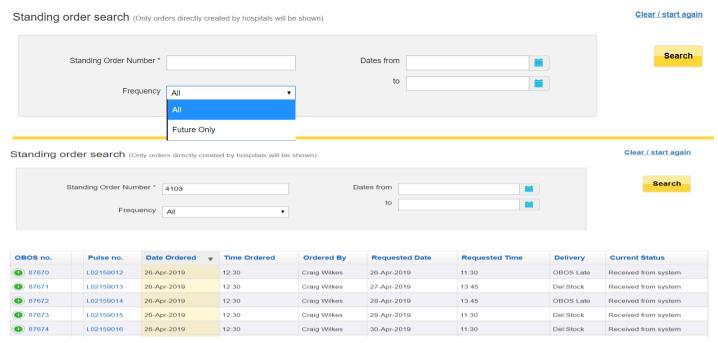
### Searching SSO



You can also search SSO orders created by hospitals (that have transferred across to NHSBT having being assigned a Pulse number) using any individual criteria or combination of the following:

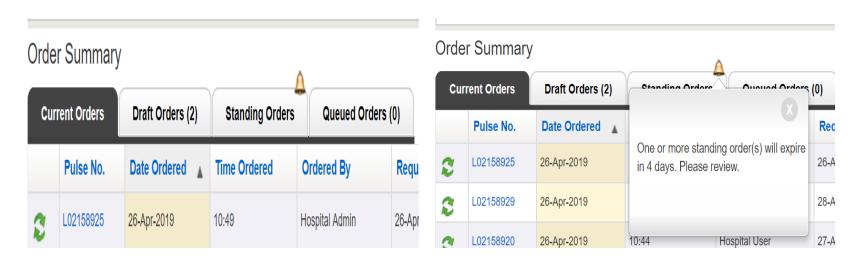
- Forename
- Surname
- DOB
- NHS Number

### Searching Standing Orders



- search using a standing order number. This can be for all orders or only future orders to be generated from that standing order using 'Future Only'
- This will generate orders as shown below. Using the date range will narrow the search if required. Users can then click on the order to view and duplicate individual orders or cancel, amend future orders.

### Monitoring Standing Orders



When a standing order is approaching its end date a bell icon will be displayed on the standing order tab on the home page.

Hovering over the icon will show an advisory message.

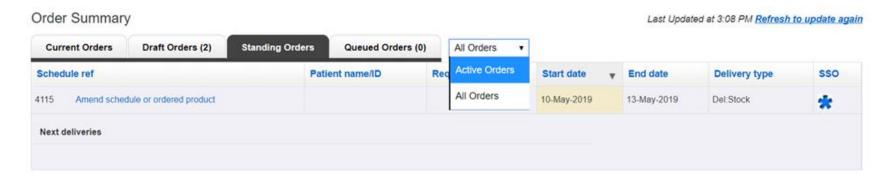
Users can view the details of the order by selecting the 'Amend schedule or ordered product' link

### Monitoring Standing Orders

The expiry details of each order can be seen by hovering over the icon.



It is recommended that standing orders that have not future delivery dates are removed as part of good housekeeping. If you are required to keep all standing orders the page can be filtered to only show active orders as shown below.



#### Reconciling an Order

### Confirming Receipt of an Order

- From the home page or search order function, locate the Pulse number of the order you wish to confirm.
- Click the pulse number to see the order details.
- Click the Confirm delivery of request button below the status.
- This will produce a pop-up box.
- Please complete the boxes with the correct information and click confirm.



#### Correct time and date

- An error message will appear if a date prior to the order being submitted or beyond the current date is entered.
- The date must be between when the order was submitted and the current date.
- After receipt the status will appear as "Notification Received"
- Please aim to reconcile orders within 7 days of delivery.

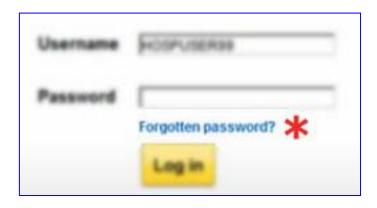




# Failed Log In Attempts and Forgotten Passwords

#### Forgotten Passwords

 If you forget your password it is possible to reset your password by clicking on the forgotten password link on the front page.



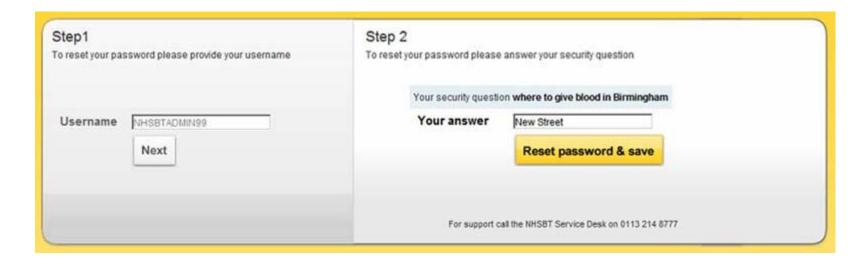
- The new password will be emailed to the email address you gave when the account was first set up.
- If you can't get into this email account you'll need to talk to your local administrator.

#### Forgotten Passwords



- Note: the system sends out fairly complex passwords so it is useful to be able to open your email address on the same PC as OBOS so it can be copy and pasted in.
- Forgotten usernames will need to be referred to your local administrator which will be a senior member of transfusion laboratory staff.

#### Forgotten Passwords



- You will be asked for a security question when you first set up your account.
  - This question will need to be answered to reset your password.
- IF you can't remember the answer to the security question the local administrator will need to reset your account.

#### Failed Log In Attempts

Log in failed	l. You have 4 attempts remaining.	Log in failed.	You have 3 attempts remaining.	
Usernamo	e wayn0001	Username	wayn0001	
Password	1	Password		
	Forgotten password?		Forgotten password?	
	Log in		Log in	
Log in failed. You have 2 attempts remaining. Please click on the Forgotten password link if you have forgotten your password.		incorrect attempt.	Log in failed. Your account will be locked after the 5th incorrect attempt. Please try the Forgotten password link or contact the OBOS administrator for your hospital.	
Username	wayn0001	Username w	ayn0001	
Password		Password		
F	Forgotten password?	Fo	rgotten password?	
	Log in		Log in	

### Failed Log In Attempts

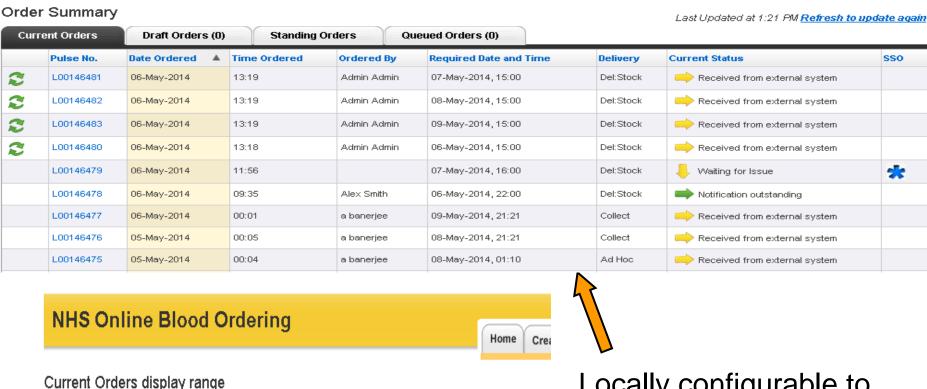
Your account has been locked. Please contact the OBOS administrator for your hospital to unlock your account.

Username	wayn0001
Password	
	Forgotten password?
	Log in

#### Administration

Home Create order My profile Administration Search order

### Adjust The Home Page



Locally configurable to

Days Before\*

Days After\*

Days After\*

Days After 14

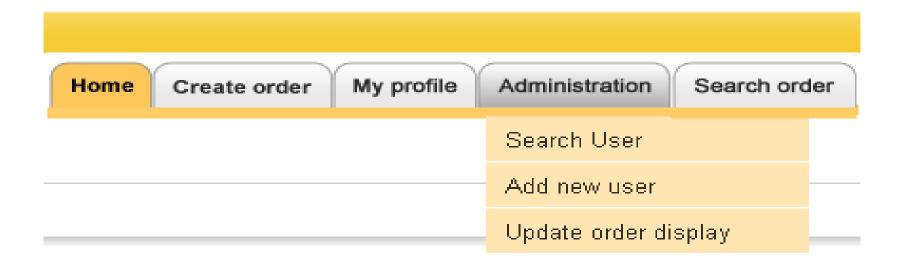
Note: Display Range will be changed for the selected hospital on clicking 'Save'.

Locally configurable to display a 15 day period from required date (max 14 days in advance)

# Three types of hospital account exist

- Reconciliation User
  - Can reconcile orders only
  - Can NOT create/cancel/amend orders
- Hospital user
  - Can place orders and standing orders
  - Can amend or delete orders and standing orders
  - Can update own profile
  - Can search for orders
- Hospital administrator
  - Can create accounts, activate users and reset passwords in addition to the functionality of a hospital user

#### Adding a New User

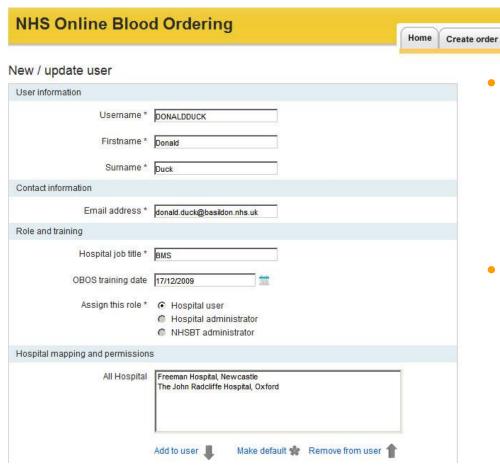


From the administration tab select 'Add new user'.

# Hospital Administrators: Adding New Users

My profile

Administration



- Enter the information into the boxes provided and select role as either hospital user or hospital administrator.
  - Email addresses can only be associated with one username. If a user moves hospitals out side of the Trust please ensure the account is deactivated.

#### Adding New Users

Select the required hospitals from the list and click Add to user, if required.



 Select a default hospital by highlighting as shown and then clicking on Make default \*\*

When details are correct click on save

Username and password will be emailed to the email address

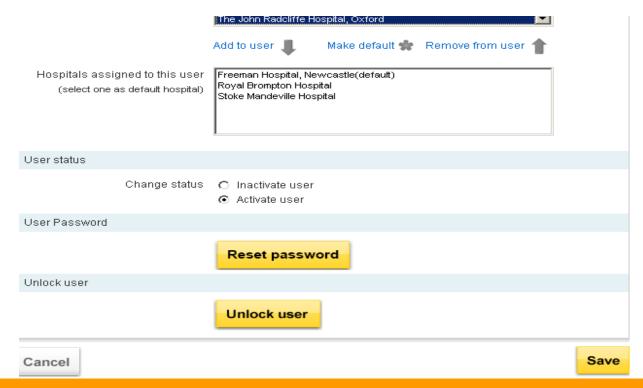
provided



Passwords require changing every 90 days. A reminder email will be sent 10 days before the password expires on the live system, if left unchanged a second email will be sent 5 days before expiry. If the deadline is missed, you will be prompted to change the password next time you log in.

## Activating/Inactivating and Re-setting Passwords

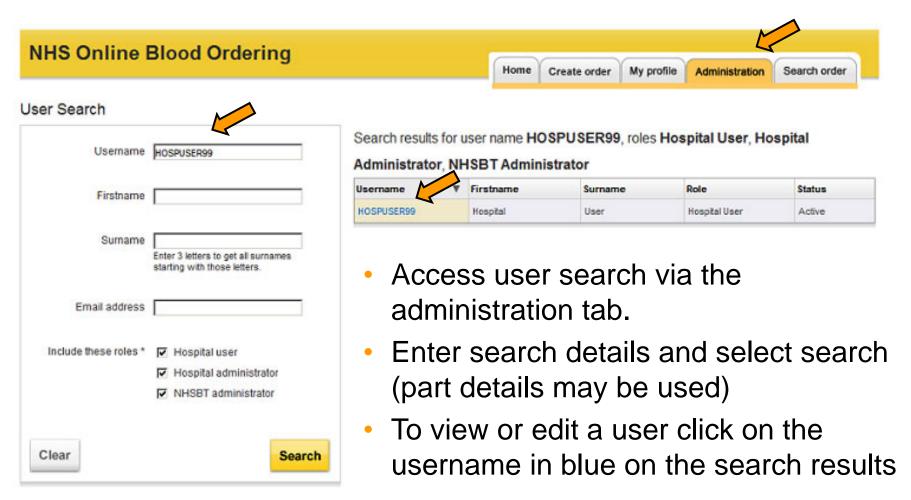
 The lower part of the new/update user screen for existing users offers the options to reset passwords, unlock users, and to activate/ inactivate users.



# Automatic deactivation of account

- You should deactivate any user accounts when the user leaves a hospital/Trust they no longer need to order components for. This will remove the possibility of accessing the wrong account and placing orders for the wrong location.
- If an account has not been accessed for 9 months, it will automatically be deactivated. User will receive prior email notification giving them the option to log in to the account to stop it being deactivated.
- These accounts can be reactivated by any user with administrator level access.

### Searching New Users



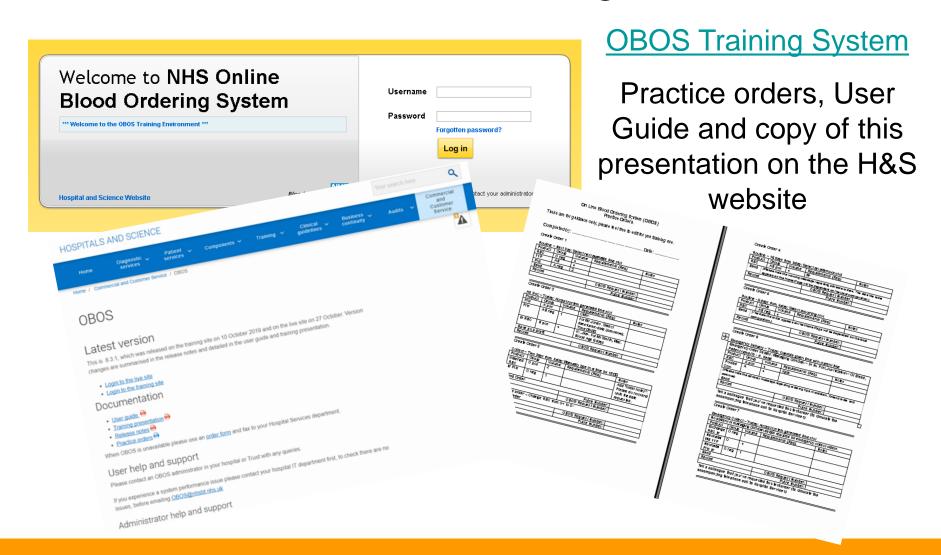
#### Training/Live System E-mails

- Two separate emails one confirming the chosen Username and one containing the system generated password
- From: no-reply@nhsbt.nhs.uk [mailto:no-reply@nhsbt.nhs.uk]
- Subject: OBOS Credentials

#### **Examples:**

- Your username to log into the Online Blood Ordering System (OBOS) is: Apli0001
- Your password to log into the Online Blood Ordering System (OBOS) is: &cq=r}\*Sj(O=&-

#### **OBOS** Training



#### The End

OBOS@nhsbt.nhs.uk