On-line Blood Ordering System

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

The Welcome Screen

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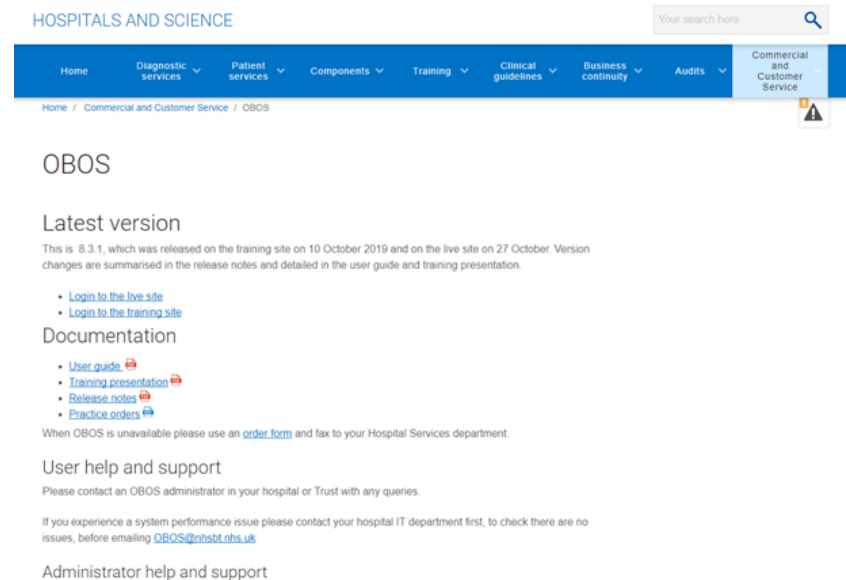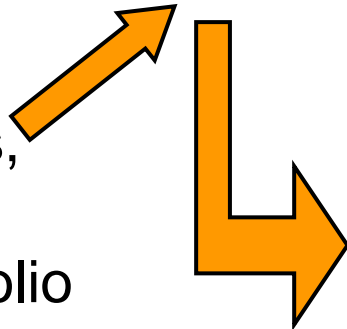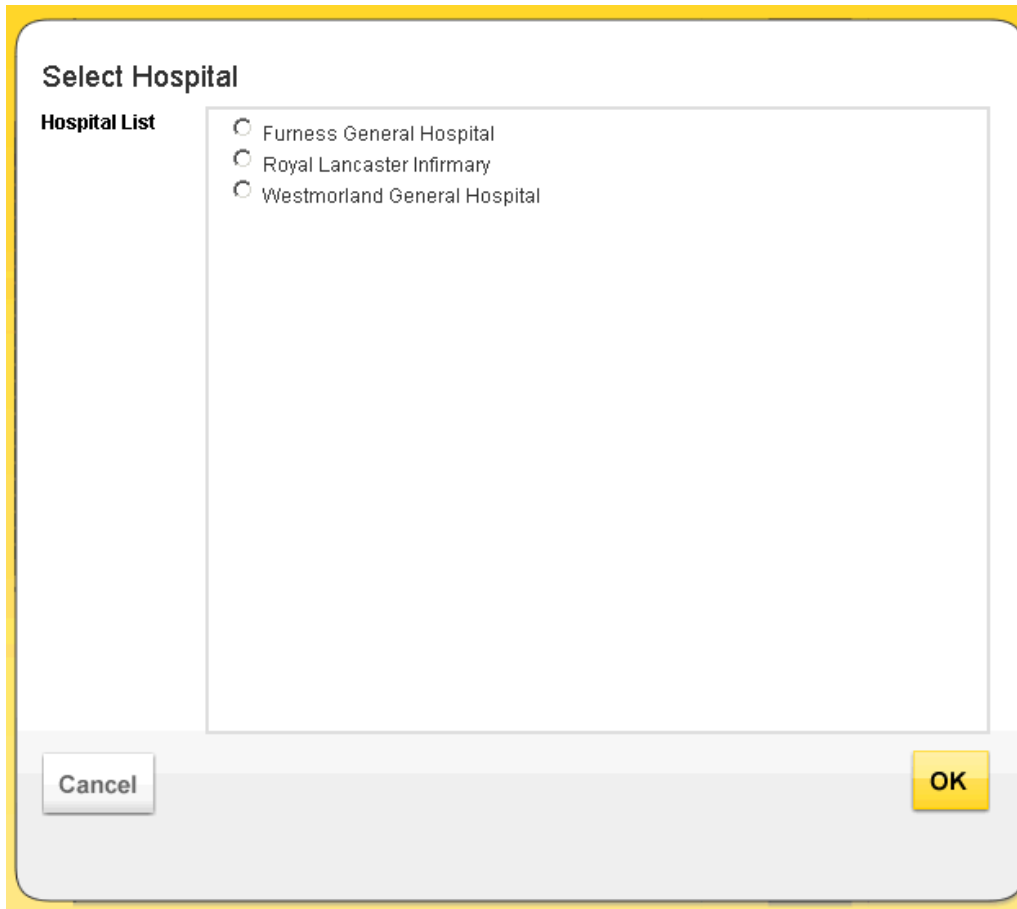
Logging In
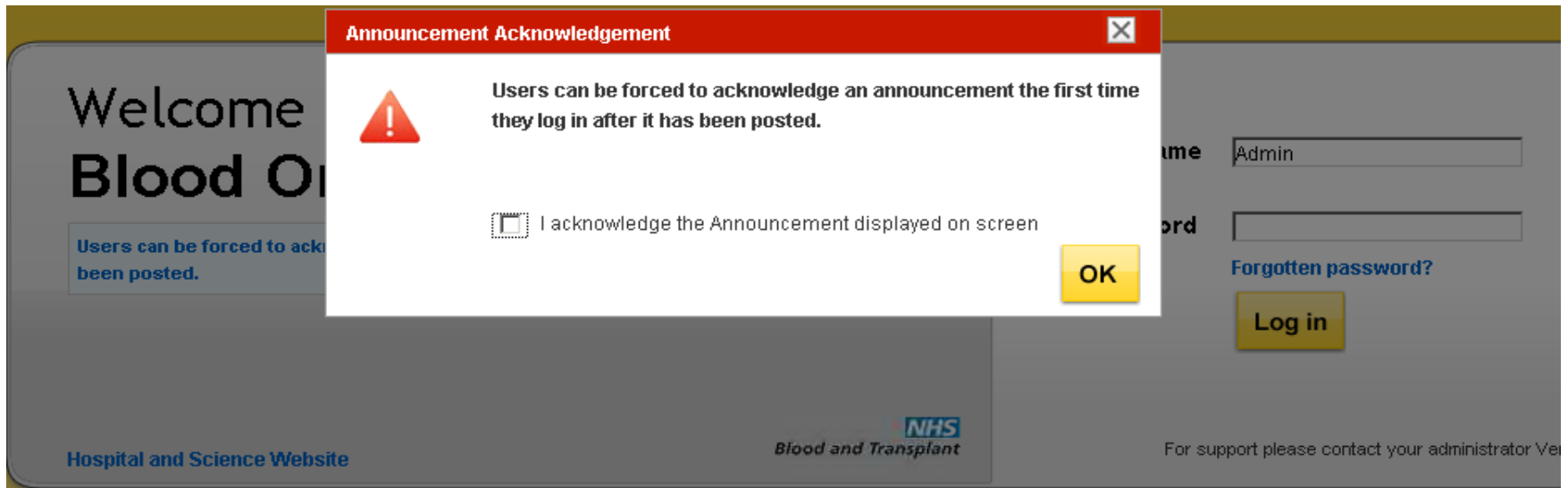
- If an announcement has been posted users will need to acknowledge before entering the system. This is required only once per new announcement.

Select Hospital

Select Hospital

Hospital List
- ○ Furness General Hospital
- ○ Royal Lancaster Infirmary
- ○ Westmorland General Hospital

Cancel   OK

- 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

The Home Page

The Home Page

- 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
♻	L00146481	06-May-2014	13:19	Admin Admin	07-May-2014, 15:00	Del:Stock	➡ Received from external system	
♻	L00146482	06-May-2014	13:19	Admin Admin	08-May-2014, 15:00	Del:Stock	➡ Received from external system	
♻	L00146483	06-May-2014	13:19	Admin Admin	09-May-2014, 15:00	Del:Stock	➡ Received from external system	
♻	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 Home Page

- 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.

The Home Page

- 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

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

NHS Online Blood Ordering

Delivery Information

Delivery method *

Required date *

Required time * AM

Add Products

| Red blood cells | Platelets | Frozen products | White blood cells | Order notes |

Order Preview

Product*	ABO*	RhD*	Qty*	CMV-	HT-	HbS-	IgA	Aph	HEV-	Req.	Remove
Red Cells				☐	☐	☐	☐	☐	☐	+	✖
Red Cells				☐	☐	☐	☐	☐	☐	+	✖
Red Cells				☐	☐	☐	☐	☐	☐	+	✖
Red Cells				☐	☐	☐	☐	☐	☐	+	✖

Blood order

Save draft   Send or

+Add line

Add to order ➡

The Ordering Screen

Add Products

| Red blood cells | Platelets | Frozen products | White blood cells | Order notes |

- 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.

Delivery Information

- 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

Delivery Information

- 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)

Delivery Information

- 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.

Delivery Information

- 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

Ordering Red blood cells

Product*

Red Cells ▼

Red Cells
Red Cells Irradiated
Exchange RBC Irradiated (Neonatal)
IUT Red Cells Irradiated
LVT in SAGM (Neonates and Infants)
LVT in SAGM Irradiated (Neonates and Infants)
Neonatal Red Cells
Neonatal Red Cells Irradiated
Washed Cells Ext. Life
Washed Cells Irradiated Ext. Life

ABO

- 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

Ordering Red blood cells

- 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)

Ordering Red blood cells

Red blood cells	Platelets	Frozen products	White blood cells	Order notes

Product*	ABO*	RhD*	Qty*	CMV-	HT-	HbS-	IgA	Aph	HEV-	Req.	Remove
Exchange RBC Irradiated (Neonatal) ▾	▾	▾		☑	☑	☑	☐	☐	☐	+	✕
Red Cells ▾	▾	▾		☑	☐	☐	☐	☐	☐	+	✕
Red Cells ▾	▾	▾		☐	☐	☐	☐	☐	☐	+	✕
Red Cells ▾	▾	▾		☐	☐	☐	☐	☐	☐	+	✕

- Any special requirements? Use the tick boxes.

- Do not use the line/order notes for special requirements.

- Certain components will automatically select additional requirements.

Ordering Red blood cells

Red blood cells	Platelets	Frozen products	White blood cells	Order notes

Product*	ABO*	RhD*	Qty*	CMV-	HT-	HbS-	IgA	Aph	HEV-	Req.	Remove
Exchange RBC Irradiated (Neonatal) ▾	▾	▾		✔	✔	✔	☐	☐	☐	⊕	✖
Red Cells ▾	▾	▾		✔	☐	☐	☐	☐	☐	⊕	✖
Red Cells ▾	▾	▾		☐	☐	☐	☐	☐	☐	⊕	✖
Red Cells ▾	▾	▾		☐	☐	☐	☐	☐	☐	⊕	✖

+Add line

Add to order ➡

- If more then four types of red cells are required additional lines can be added by clicking the +Add line 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 hand pane, repeat if needed

- Then press **OK** 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)

Phenotypes (Negative for these antigens)   ☐ RhC   ☐ Rh E   ☐ Rh c   ☐ Rh e   ☐ K

Tick here if order is for a Sickle Patient   ☐

Tick here if order is for a Thalassaemic Patient   ☐

You cannot order negative for non-clinically significant antigens in isolation or just in combination with K negative.

Type a characteristic or select from the list :

Blood Characteristics (Negative for these antigens)

Characteristic	Description ▼
FY001	Fya
FY002	Fyb
JK001	Jka
JK002	Jkb
LU001	Lua
MN001	M
MN003	S

Characteristic	Description
KE003	Kpa

Cancel   OK

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

Red blood cells	Platelets	Frozen products	White blood cells	Order notes

Product*	ABO*	RhD*	Qty*	CMV-	HT-	Aph	IgA	HEV-	Req.	Remove
Platelets ▼	▼	▼		☐	☐	☐	☐	☐	+	✕
Platelets ▼	▼	▼		☐	☐	☐	☐	☐	+	✕
Platelets ▼	▼	▼		☐	☐	☐	☐	☐	+	✕
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?

- Click and requested platelets will appear in the Blood order summary

- 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

- 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

Notes: Please select from drop-down box (one comment only)

Select Comment ▼

Select Comment
See order notes for standing order information
Order for stock: Long dated as possible. Please call if not possible
Patient requires this TODAY
Patient requires this TOMORROW
Delivery today but in date for tomorrow
Emergency delivery- Please call if any delay
Send with previous order if possible
Collect order. Please call when ready.
Adhoc order. Please send as soon as possible
Will accept compatible substitution. Please call to discuss
FREE TEXT BOX

Confirmation Message ✕

⚠ Text already exists in the line notes. Do you want to replace the existing text? Or add this comment to the existing text?

[Replace] [Add Text] [Cancel]

- 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

ONLY to be used for follow up product requests

- Select product type. Only one type of product per order

- Select order type (HLA matched, HLA/HPA matched or HPA matched

Specialist Stock Orders

- Select the product required

- Submit order

- After reading the advisory message select OK

Specialist Stock Orders

- 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
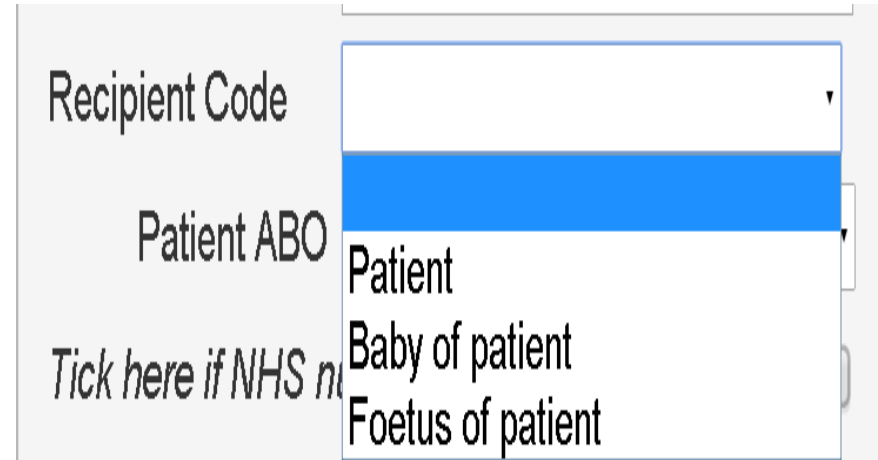
Specialist Stock Orders

- 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.

Specialist Stock Orders

Important Announcement for HLA/HPA Orders

To ensure your order is processed promptly please contact:

Between 09:00 and 17:00 hours ring local HLA Platelet Service on 0208 957 2814 (South) or 0114 358 4806 (North).

Between 17:01 and 08:59 hours ring your local Hospital Services department.

OK

Important Announcement for HPA Orders

To ensure your order is processed promptly please contact:

Between 09:00 and 17:00 hours ring Platelet Immunology on 01179125728.

Between 17:01 and 08:59 hours ring your local Hospital Services department

OK

- 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

Specialist Stock Orders

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.

Specialist Stock Orders

- 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 maximum end date that can be selected for SSO orders is one month from the start date**

Delivery Information

Delivery method * `Del:Stock`

Start date * `13/05/2015`

Start time * `HH:MM`

End date `25/06/2015`
The maximum end date that can be
selected is one month from the start date

Standing Order Delivery Schedule

Frequency * `Every week`

On * ☑ Mon `15:30`
☐ Tues
☑ Wed `10:05`
☐ Thur

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.

Specialist Stock Orders

Order Summary

Last Updated at 1:24 PM *Refresh to update again*

	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)	

Tabs: **Current Orders** | Draft Orders (0) | Standing Orders | Queued Orders (0)

- 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

- Click *Preview in a separate page* to see a full page view to check before sending

Order Preview

Order Preview Page

Order Preview

Order Preview   Ad Hoc Order For **1/21/2016; 16:14**

Red Cells *Red blood cells*	**O Neg** Requested: **2**	
Platelets *Platelets*	**A Pos** Requested: **1**	
Fresh Frozen Plasma *Frozen products*	**AB Pos** Requested: **5**	
Granulocytes Pooled (Irradiated) *White blood cells*	**O Neg** Requested: **1**	

- 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.

Order Preview
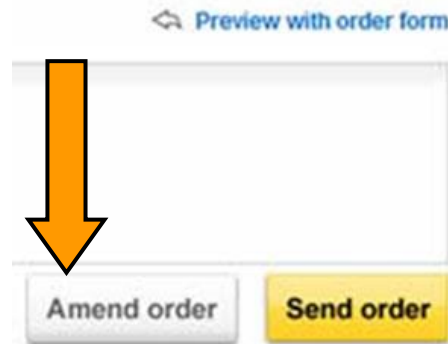
- Once the order has been checked any amendments can be made by clicking on the Amend order button.

- This takes the user back to the create order screens for amendments to be made.

Order Preview

- 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.

Order Preview

- 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.

Order Preview
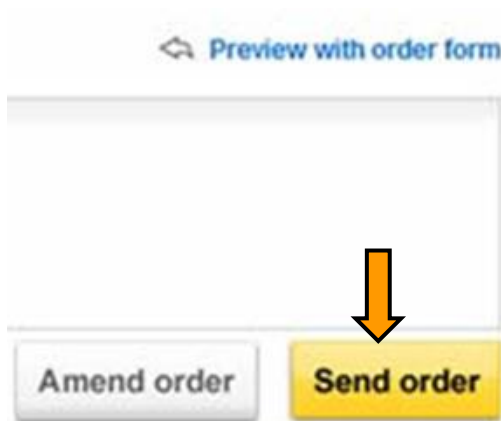
- Once the user is happy the request is complete and correct it should be submitted by clicking on the **Send order** button.

- 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

NHS Online Blood Ordering

Home | Create order

Delivery Information

Delivery method **Del:Stock**

Required date **02/06/2012**

Required time **AM**

Request Information

OBOS request 44970

Order Information

Hospital name

Submitted by

Submitted on 01/06/2012

Submitted at 10:24

Status ⊗ Queued

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 Hospitals & Science website

Order Confirmation

Order Information

Hospital name	
Submitted by	
Submitted on	31/05/2012
Submitted at	17:19
Hospital Services Dept.	NAT ACCEPT SITE 1
Status	Received from system
Pulse number	L00053803

- 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

Order Summary

	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**
↻	L00146481	06-May-2014	13:19	Admin Admin	07-May-2014, 15:00	Del:Stock	➡ Received from external system	
↻	L00146482	06-May-2014	13:19	Admin Admin	08-May-2014, 15:00	Del:Stock	➡ Received from external system	
↻	L00146483	06-May-2014	13:19	Admin Admin	09-May-2014, 15:00	Del:Stock	➡ Received from external system	
↻	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	
	L00146476	05-May-2014	00:05	a banerjee	08-May-2014, 21:21	Collect	➡ Received from external system	
	L00146475	05-May-2014	00:04	a banerjee	08-May-2014, 01:10	Ad Hoc	➡ Received from external system	

- 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

Emergency Order Details

Managing Clinician*

Patient name/ ID

Justification *
- [ ] Other haemorrhage
- [ ] GI bleed
- [ ] Obstetric haemorrhage
- [ ] Phenotyped units
- [ ] Ruptured AAA

- [ ] RTA/Trauma
- [ ] Surgical bleeding (in theatre/post Op)
- [ ] Severe coagulopathy
- [ ] Thrombocytopenia
- [ ] Any other reason

You will be prevented from adding more than one justification.

- Selecting emergency as the delivery type will produce a further selection of boxes which are mandatory (*) and must be completed.

- These ask for the same information that is currently requested on the 'request for emergency delivery fax', and it is information which may be required should a vehicle carrying emergency components be involved in an incident.

Order Status

(Order Summary Screen)

Order Status

Delivery	Current Status
Emergency	✖ Unfulfilled
Ad Hoc	⬇ Waiting for Issue
Del Stock	🔒 Locked by another user
Ad Hoc	➡ Received from external system
Del Stock	⬇ Awaiting allocation (external)
Del Stock	✔ Preparation in progress
Del Stock	⬇ Awaiting allocation (external)
Del Stock	▭ Notification received
Del Stock	✔ Prepared, Awaiting Dispatch
Del Stock	▭ Notification received
Ad Hoc	✔ Partially Issued
Del Stock	➡ Notif. outstanding-dispatched

Order Status
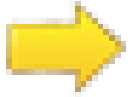
1. Received from external source
   - indicates that NHSBT have received the order and a Pulse order number had been allocated.
2. Awaiting allocation
   - indicates that staff at NHSBT have viewed the order, but have not yet allocated specific donations to fulfil the order.
3. Waiting for issue
   - indicates that units have been allocated to the order but the order has not yet been prepared.
4. 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.

Order Status

 7. Prepared awaiting dispatch

- indicates that the order is complete but had not yet left NHSBT

 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.

 9. Notification received

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

 10. 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.

Order Status

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.

Order Status

- 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

Order substitutions

	Red Cells *Red blood cells*	B Pos	Requested: Allocated: Issued:	2 none none	HbS-, Blood Char neg for: **K, Rh C, Rh E,** Max blood age: **14 days** **Notes:**	Patient: **60428244**
	Red Cells *Red blood cells*	B Neg	Requested: Allocated: Issued:	0 2 2	HbS-, Blood Char neg for: **K, Rh C, Rh E,** Max blood age: **14 days** **Notes:**	Patient: **60428244**

- 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 an O pos platelet has been substituted for the A pos originally requested.

Standing Orders

Standing Order

Standing Order

Delivery Information

Delivery method * | Del:Stock
Start date * | 22/01/2016
End date | 11/01/2017
If no end date is selected the standing order will continue until further notice

Standing Order Delivery Schedule

Frequency * | Every week

Time Required

On * | ☐ Mon
☐ Tues
☐ Wed
☐ Thur

Except on

- 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.

Standing Order

- 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.

Standing Order

Delivery Information

Delivery method * [Del:Stock ▼]

Start date * [22/01/2016]

End date [11/01/2017]
If no end date is selected the standing order will continue until further notice

Standing Order Delivery Schedule

Frequency * [Every week ▼] Please check to see if your hospital services dept. delivers on the days selected

On * ☑ Mon Time Required [09:25] ☑ Fri Time Required [16:30]
      ☐ Tues [   ] ☐ Sat [   ]
      ☑ Wed [09:25] ☐ Sun [   ]
      ☐ Thur [   ]

Except on [27/01/2016]

Require on [28/01/2016~16:30]

- 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.

Standing Order

- 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

Order Summary

Last Updated at 2:03 PM **Refresh to update again**

Current Orders	Draft Orders (0)	Standing Orders	Queued Orders (0)

Schedule ref		Patient name/ID	Required time	Start date ▼	Delivery type
605	Amend schedule or ordered product	Miss Take	15:00	06-May-2014	Del:Stock

Next deliveries

1. 12-May-2014	4. 15-May-2014	7. 20-May-2014
2. 13-May-2014	5. 16-May-2014	
3. 14-May-2014	6. 19-May-2014	

606	Amend schedule or ordered product	R Bleeding Little Fella Andy Body	10:00	07-May-2014	Collect

Next deliveries

1. 14-May-2014

2. 20-May-2014

Cancelling or Amending Standing Orders

Cancel order ☒

⚠️ **Please confirm that you want to cancel this standing order.**

This will cancel
- all order lines not currently shown on the Home Page
- all product types(all tabs)

Any orders generated by this standing order that have been sent to Pulse and appear on the home page **will not** be cancelled. These Orders will need to be cancelled Individually.

[No, don't cancel]   [Cancel order]

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

Searching OBOS

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

SSO Patient Search (Only orders directly created by hospitals will be shown)

Forename: Granny   DOB: _____

Surname: _____   NHS Number: _____

Search

Search results for forename **Granny**

OBOS no.	Pulse no.	Date Ordered ▼	Time Ordered	Ordered By	Requested Date	Requested Time	Delivery	Current Status	SSO
83951	L00703331	10-Jun-2016	16:43	Craig Wilkes	13-Jun-2016	09:00	OBOS Late	Received from system	✳
83952	L00703332	10-Jun-2016	16:43	Craig Wilkes	14-Jun-2016	09:00	OBOS Late	Received from system	✳
83953	L00703333	10-Jun-2016	16:43	Craig Wilkes	15-Jun-2016	09:00	OBOS Late	Received from system	✳
83954	L00703334	10-Jun-2016	16:43	Craig Wilkes	16-Jun-2016	09:00	OBOS Late	Received from system	✳
83955	L00703335	10-Jun-2016	16:43	Craig Wilkes	17-Jun-2016	10:00	OBOS Late	Received from system	✳

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.
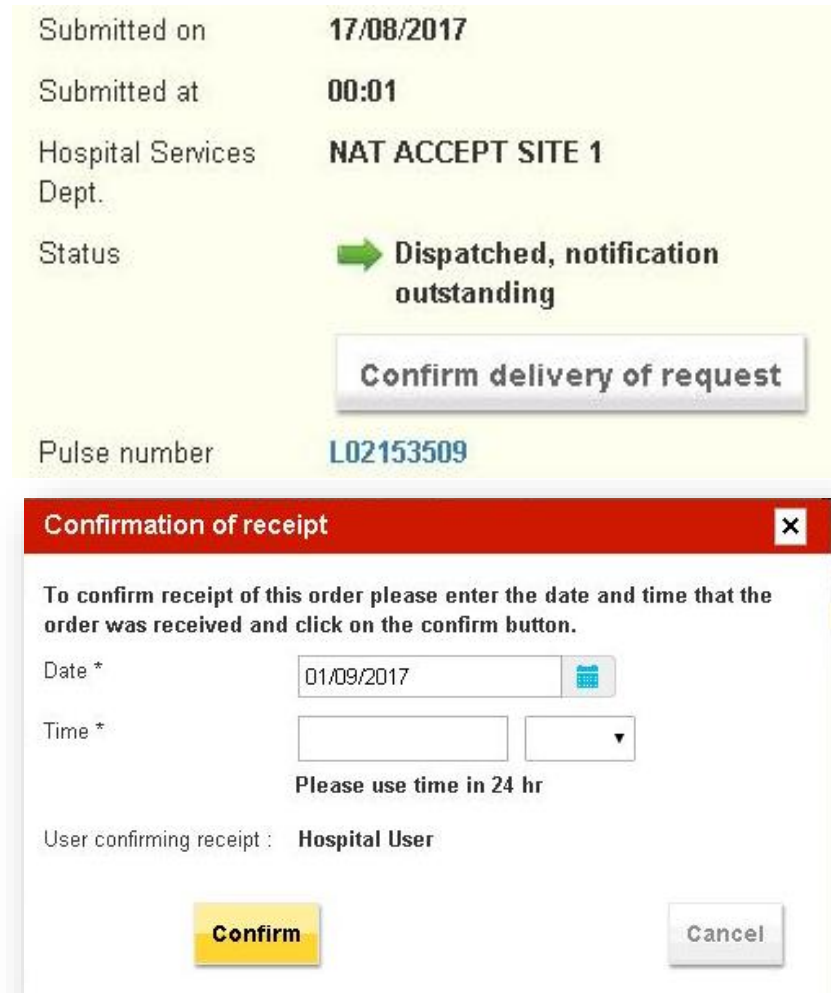
Reconciling an Order

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** .

Submitted on	17/08/2017
Submitted at	00:01
Hospital Services Dept.	NAT ACCEPT SITE 1
Status	➡ Dispatched, notification outstanding
	Confirm delivery of request
Pulse number	L02153509

Confirmation of receipt ✕

To confirm receipt of this order please enter the date and time that the order was received and click on the confirm button.

Date * 01/09/2017

Time *

Please use time in 24 hr

User confirming receipt : **Hospital User**

Confirm   Cancel

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.

Submitted at	00:01
Hospital Services Dept.	NAT ACCEPT SITE 1
Status	📒 **Notification received**
Pulse number	L02153509

Confirmation of receipt ✕

To confirm receipt of this order please enter the date and time that the order was received and click on the confirm button.

Date * 02/09/2017

Time * 02:00   02:00 ▼

Please use time in 24 hr

Date entered must be in between Order Date and Current Date

User confirming receipt : **Hospital User**
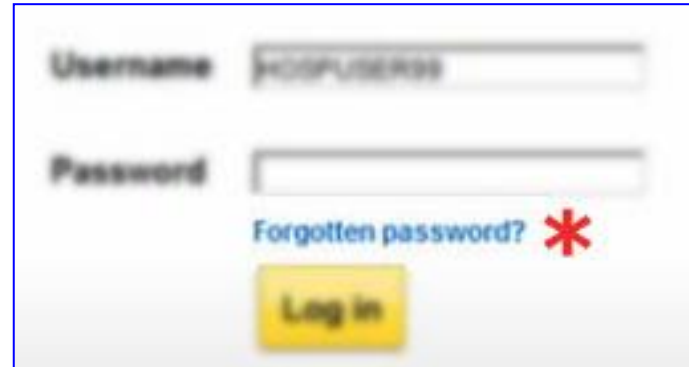
Confirm   Cancel

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

Step1

To reset your password please provide your username

Username [   ]

[Next]

For support call the NHSBT Service Desk on 0113 214 8777

- 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. You have 4 attempts remaining.

Username   wayn0001

Password

Forgotten password?

Log in

Log in failed. You have 3 attempts remaining.

Username   wayn0001

Password

Forgotten password?

Log in

Log in failed. You have 2 attempts remaining. Please click on the Forgotten password link if you have forgotten your password.

Username   wayn0001

Password

Forgotten password?

Log in

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

Password

Forgotten password?

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

Adjust The Home Page

Order Summary

Last Updated at 1:21 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
⟳	L00146481	06-May-2014	13:19	Admin Admin	07-May-2014, 15:00	Del:Stock	➡ Received from external system	
⟳	L00146482	06-May-2014	13:19	Admin Admin	08-May-2014, 15:00	Del:Stock	➡ Received from external system	
⟳	L00146483	06-May-2014	13:19	Admin Admin	09-May-2014, 15:00	Del:Stock	➡ Received from external system	
⟳	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	
	L00146476	05-May-2014	00:05	a banerjee	08-May-2014, 21:21	Collect	➡ Received from external system	
	L00146475	05-May-2014	00:04	a banerjee	08-May-2014, 01:10	Ad Hoc	➡ Received from external system	

NHS Online Blood Ordering

Home | Crea

Current Orders display range

Days Before* [1]

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
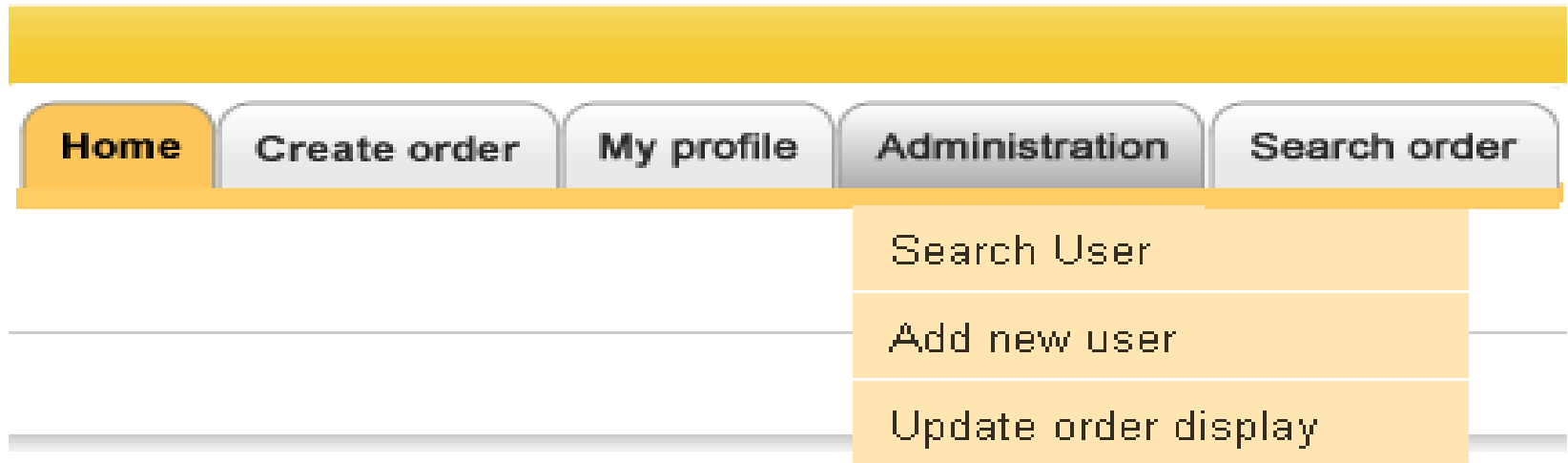
- From the administration tab select 'Add new user'.

Hospital Administrators: Adding New Users

- 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

Hospital mapping and permissions

All Hospital
Darent Valley Hospital
Basildon Hospital
Charing Cross Hospital
The John Radcliffe Hospital, Oxford

Add to user ⬇   Make default ✳   Remove from user ⬆

Hospitals assigned to this user
(select one as default hospital)
Freeman Hospital, Newcastle
Royal Brompton Hospital
Stoke Mandeville Hospital
Plea

- 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

- Access user search via the administration tab.
- Enter search details and select search (part details may be used)
- To view or edit a user click on the username in blue on the search results

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

OBOS Training System

Practice orders, User Guide and copy of this presentation on the H&S website

The End

OBOS@nhsbt.nhs.uk