Instructions

Welcome to the OHSM software instructions. This software is for Occupational Health Service records and is designed to be simple and easy to use for doctors, nurses and clerical staff.

It is not intended for networks of hundreds of users simultaneously. It is intended for up to twenty users at one time. It will easily cope with occupational health records for up to 20,000 employees or clients.

With the software you will be able to do the following basic tasks:

- Record clinical records following consultations.
- Store documents (scanned from paper or electronic).
- Run a health surveillance recall programme.
- Run a vaccination recall programme.
- Run a First Aid training programme.
- Run simple management searches to audit your clinical work and help with invoicing customers.

The software aims to do what traditional paper systems did very well, add the benefits of being able to access records from multiple workstations and reduce the workload from filing, storing and extracting paper. In addition, the system has an audit trail which ensures that practitioners can prove when they made records and when they were changed.

The OHSM software is based on Microsoft Access and will run on any version from 2003 onwards. The minimum hardware and software you will need to run the software efficiently will be:

- Microsoft Windows x64 10 1507 or later
- Microsoft SQL Server 2019 or later
- Microsoft Access 2016 or later
- Processor speed 2GHz 64Bit or more
- Memory size 8 GB or more
- Hard Drive size 200 GB or more
- Network speed 1 GigaBits per second or more

For details about your present hardware, please ask your IT department.

How to set up as an Administrator and set up other Users

- Load the program by using the OHSM shortcut from the start menu or by opening OHApp.mdb from the OHSM installation directory and make sure to allow OHSM to run any of its macros. Next you will see a Security Notice. Just click "Open".
- Now you will be asked to enter your username and password. Your default Administrator has "**Administrator**" as the username and "**Administrator**" as the password.
- You will now see the OHSM Welcome screen.

Creating users and changing user details

- From the welcome screen, to set up your default users, click on "Admin Panel", the far right button.
- Click on the button "Modify User Accounts"
- To change your password click on the "New Password" button next to your username. (**HIGHLY RECOMMENDED**)
- To add another user click on the "Add" button.
- Enter a username, password and full name for the new user, and select whether they will be an Administrator.
- Click "Save" if you want to confirm the new user.
- Click "Abort" if you want to cancel the new user.
- To remove a user click on the "Remove" button next to that username.

Please note, we recommend that you only have one or two administrators since this will help you to keep control of your system defaults and reduce the risk of unwanted changes to your system. Your administrators must take managerial and clinical responsibility for changes made to your OHSM system.

If you remove a user, this does not delete any of their clinical activity. Their records and clinical activities remain visible on the system. You can reinstate them later as a user if you wish.

If you have any problems, please visit our website at http://www.wilsonsn/ohsm for our contact information

How to change administrator defaults for departments, employers, consultation types, outcomes, documents vaccines and hazards

- From the welcome screen, to set up your system defaults, click on “Admin Panel”, the far right button.
- Click on the each menu button it turn such as “Modify Departments”
- For each menu button, change, add or remove from the existing system defaults as required.
- We have entered some defaults to help you, but you can amend or delete these as required.

How to view the audit trail on a consultation record

1. Open the required employee record
2. Click the “Consultation” button
3. Scroll up or down to view the correct date record
4. Hold down the CTRL key and click in the consultation notes field until the audit trail information is displayed

How to view the audit trail on an attached document

1. Open the required employee record
2. Click the “Documents” button
3. Scroll up or down to view the correct date record
4. Hold down the CTRL key and click the “View” button. The audit trail information will be displayed

How to register an employee/client on the system

From the Welcome Screen:

1. Click the “Add New Employee” button.
2. Enter the First Name, Surname, Date of Birth and Employer – this is the minimum data for every employee or trainee.
3. Enter any other data for this employee.
4. Click the “Save” button.

How to find, select, recall and close an employee record

From the Welcome Screen:

1. Click the “Find Employee” button.
2. Enter all or part of the Surname or First Name or Date of Birth and Employee.
3. Press “Enter”.
4. Double click the employee from the list or press Enter when the correct employee is highlighted.
5. To close the record click “Close Employee Record”.

How to add a new consultation record

1. Open the required employee record
2. Click the “Consultation” button
3. Click the “Add Record” button
4. Type the clinical record in the blank white box
5. For a new line space press “CTRL” and “ENTER” together
6. Select the type of consultation from the drop down menu
7. Select the optional outcome and date for review if needed from the drop down menus
8. Click the “Spelling” button to spell check your text
9. Click “Save”
10. Note – you can edit an existing clinical record from the consultation display form

How to view or print an existing consultation record

1. Open the employee record
2. Click the “Consultation” button
3. Scroll up or down to view the correct date record
4. Click the “>” or “<” buttons to enlarge the field of view
5. Check the “Select to Print” box
6. Click the “Print Selected” button
7. Click the document with the magnifying cursor to enlarge or shrink
8. Click “Print” or “Close Print Preview” according to need.

How to attach a new document

1. Open the required employee record
2. Click the “Documents” button
3. Click on the “Modify” button
4. Click the “Insert/Overwrite” button
5. The recommended document image format is MDI (Microsoft Document Imaging). This program is available on all office install disks.
6. The default file extension filter is .MDI. For example, if you wish to attach a .PDF file, you must change the default file extension filter (in the File type box)
7. Browse to its file location and select the document that you wish to attach.

How to add a vaccination event or recall

1. Open the required employee record
2. Click on the “Vaccination Recall” button
3. Click on the “Add” button

How to add a health surveillance event or recall

1. Open the required employee record
2. Click on the “Health Surveillance Recall” button
3. Click on the “Add” button

How to add a first aid entry

1. Open the required employee record
2. Click on the “First Aid” button
3. Enter First Aid data

How to Mail Merge from Health Surveillance Recall Form

1. Prepare a MS Word template for the document to mail merge
2. Click the Health Surveillance Recall button
3. Click the button "Report - Health Surveillance Recall"
4. Choose the hazard from the drop down menu
5. Enter a date range from and to
6. Click the Mail Merge button
7. Click on the MS Word template prepared above
8. Click "Open"
9. Place the cursor over the place in your document to insert a merged field
10. Click Insert Merge Field
11. Choose a field to merge, e.g. Surname
12. Move the cursor to the next place and repeat selection of field to merge
13. When all fields have been entered click Finish and Merge
14. Select to edit, print or email
15. Note - you can save the file of merged documents for printing later if necessary

How to use management reports

Management reports are accessible via the "Management Reports…" drop-down box and also on the "Vaccination Recall", "Health Surveillance Recall" and "First Aid" sections of OHSM. A brief description of each report follows:

Vaccination Recall reports – Immunisation Recall List

- Selects employees due for immunisation check-up by filters on Date range and one or more Vaccines.
- Displays results as Vaccine, Surname, First name, Date of Birth, Date Due and result/comment

Health Surveillance Recall reports – Health Surveillance Risk List

- Selects Employees by filters on their association with one particular hazard. **Mail merge** feature is provided.
- Displays results as Surname, First names, NI Number, Date of Birth, Department, Employer, Date last seen, Surveillance due

Health Surveillance Recall

- Selects employees by filters on their association with one particular hazard and date range. **Mail merge** feature is provided
- Displays results as Surname, First name, Date of Birth, Date Due, Department, NI Number

First Aid reports

All first aiders

- Selects employees who have first aid information
- Displays results as Surname, First name, Title, NI Number, Date of Birth, Department, Certificate, Primary course, Last course.

First aiders – due for refresher

- Selects employees who require a refresher first aid course
- Displays results as Surname, First name, Title, NI Number, Date of Birth, Department, Certificate, Primary course, Last course.

Management Reports drop down box

Consultation Search

- Selects consultations by filters on Date Range, Practitioner and Consultation Type.
- Displays results as First Name, Surname, Date of Birth and Date of Consultation

Employer List

- Selects Employees by filter on one or more employer
- Displays results as Employer, Surname, First names, Title, NI number, Date of Birth

Workload by Employer

- Selects consultation type workload information by filters on Date range and one or more employer
- Displays results as Employer, per Employer count of Consultations by Consultation Type and per Employer count of Consultations total

Workload by Practitioner

- Selects consultation type workload information by filters on Date range and one or more practitioner
- Displays results as Practitioner, per Practitioner count of Consultations by Consultation Type and per Practitioner count of Consultations total

Consultation Outcomes by Employer

- Selects consultation outcomes workload information by filters on Date range and one or more employer
- Displays results as Employer, per Employer count of Consultations by Consultation Outcome and per Employer count of Consultations total

Consultation Outcomes by Practitioner

- Selects consultation outcomes workload information by filters on Date range and one or more practitioner
- Displays results as Practitioner, per Practitioner count of Consultations by Consultation Outcome and per Practitioner count of Consultations total

Consultation Recall

- Selects Employees due for a “Review” Consultation by a filter on Date Range
- Displays results as Surname, First name, Date of Birth and Date due