

## OptoRec 1.0.0 Help Guide

The 'OptoRec 1.0.0 Help Guide' explains how to use the basic features of the OptoRec app.

### Contents

1. [Introduction to OptoRec](#)
  - a. [Main Features](#)
  - b. [Multiple Users](#)
  - c. [Data Export](#)
2. [Overview](#)
  - a. [Users](#)
  - b. [Clients](#)
  - c. [Clinical](#)
  - d. [Transactions](#)
3. [Setup and Edit User Account](#)
  - a. [User Account Centre](#)
  - b. [New User Account](#)
  - c. [Edit Account Info](#)
4. [Client Centre](#)
  - a. [Search Clients](#)
  - b. [New Clients](#)
  - c. [Editing Client Records](#)
5. [Clinical Data](#)
  - a. [Consult Portal](#)
  - b. [Consultations](#)
  - c. [Consultation History](#)
  - d. [Clinical Form](#)
6. [Transactions](#)
  - a. [Transaction Centre](#)
  - b. [Products and Services](#)
7. [Export Centre](#)
  - a. [Export Consultation Data](#)
  - b. [Export Transaction Data](#)
8. [Quick Message](#)
  - a. [Client Centre Quick Message](#)
  - b. [Clinical window Quick Message](#)

## 1. Introduction to *OptoRec*

### a. Main Features

*OptoRec* is an optometric record management system made for the working optometrist to solve his or her everyday data needs. It is a great tool for the standard clinical setting and it is useful during outreach scenarios as well. *OptoRec* is designed to record and manage the information that is produced during the day-to-day operations of an optometry clinic.

This information includes:

- Client personal information.
- VA exam results.
- Patient history.
- Internal and external eye exam results.
- Diagnoses, prescriptions and management plans.
- Other optometric data.
- Records of financial transactions.
- Products and services on offer.

### b. Multiple Users

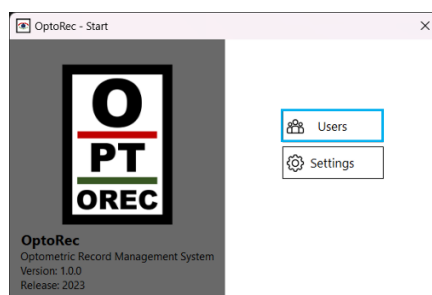
*OptoRec* allows a single user account to be simultaneously accessed across different computers that have the *OptoRec* app installed. Staff can therefore manage non-clinical records while the clinician can record clinical data at the same time, streamlining the workflow in clinical setting.

### c. Data Export

*OptoRec* also has a data export feature. This allows the user to export anonymous clinical and financial data for further analysis outside of the app. This useful for doing data collection, research or even for doing financial accounting.

## 2. Overview

When the *OptoRec* app starts, it opens into the Start window. To enter the app, click “Users” to either setup or login to a user account to start using the features of the app.



The *OptoRec* user interface consists of three main window environments: (a.) Users, (b.) Clients and (c.) Clinical, which are all indicated in the window title bar.

a. Users:

The Users window is the window a user first encounters when they click “Users” in the [Start window](#). In this window, the user can setup a user account and start using the features of the app.



b. Clients:

The Clients window environment contains most of the features, including the [Client Centre](#) and the [Transaction Centre](#). The environment is accessible once a user has logged in to their account.



c. Clinical:

The Clinical window is the *only* environment in which clinical data can be recorded, therefore there is restricted access to this window. The Clinical window environment can only be accessed through the [Consult Portal](#).



d. Transactions:

This is the environment in which all financial transactions and records are managed. This environment is accessed through the [Client Centre](#).

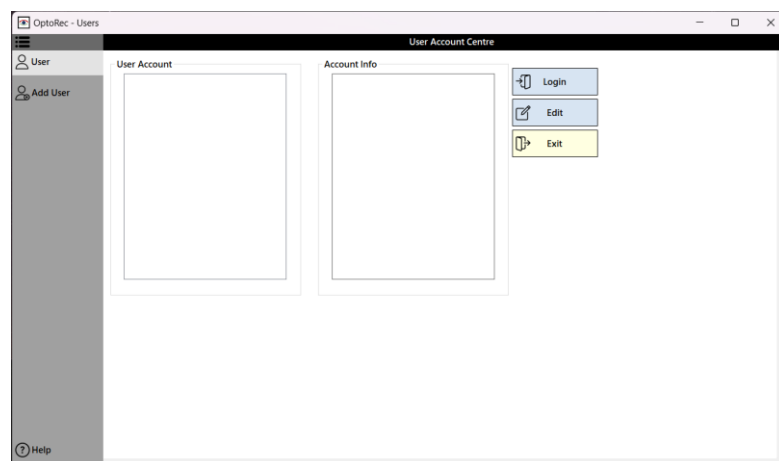


### 3. Setup and Edit User Account

All the user account features can be found in the Users windows including setting up, editing and logging into user accounts. The following are the main features of the [Users window](#):

a. User Account Centre

The User Account Centre is the form that it is opened when you click “Users” in the Start window. You can login to and edit user accounts from the User Account Centre.



### *Login to Account*

- i. Click "Login" in the User account centre.
- ii. Enter Username and General Password in the password prompt and click "Login" to enter the user account

### **b. New User Account**

User accounts are setup in New User Account form.

### *Setup Account*

- i. Click "Add User" in the User window menu to open the New User Account form.
- ii. In the New User Account form, supply the requisite information.
- iii. Click "Save" to save the information and create a new user account.
- iv. Click "Exit" to return to the User Account Centre form. The username of the new account you just setup will be visible in the "User Account" box.
- v. Select username to login to the account you setup.

### **c. Edit Account Info**

#### *Edit User Account*

- i. Go to the [User Account Centre](#) in the [Users](#) window.
- ii. Click the name of the user account you wish to alter and click "Edit".
- iii. Enter the username of the account and the General Password into the login prompt to open the Edit User Account form.
- iv. In the Edit User Account form, change the account information you wish to edit.

**OptoRec 1.0.0**

**Edit User Account**

**Account Information**

Username: Perfect Vision

Clinic Name: Perfect Vision Med Eye Care

Proprietor: Unknown

Location: Kotei

Clinician: Dr Felix Awuriki

Phone Number: 050310 , 054748

E-mail Address: perfectvision@gmail.com

**Account Security**

General Password: \*\*\*\*\* ☐ Show

Clinical Password: \*\*\*\*\* ☐ Show

- v. Click “Update” to save the changes you made.
- vi. Click “Exit” to return to the [User Account Centre](#).

#### 4. Client Centre

The Client Centre is the hub for managing all client records, including clinical and financial transaction data. Each client has an individual record that contains all their data. The Client Centre is initially accessed by logging into a user account through the [User Account Centre](#).

**OptoRec - Clients**

**Client Centre**

**Client Portal**

**Search Client**

Card number or name

Card Number	First Name	Surname	Other Name(s)	Date of Birth	Gender	Occ
A03345	Chelsea	Afriyie	Akua	18/08/2006	Female	Stu.
A05923	Rita	Aggreywaa	Nana	17/09/2003	Female	Tea
A05689	Lemuel	Yeboah	Boakye	25/04/1997	Male	Tra
A67455	Johnson	Fuseini	Watara	22/01/1990	Male	Par
A98445	Precious	Anuglah	Mawuli	13/08/2000	Male	Gr
A09234	Robert	Bempah	Owusu	08/01/1994	Male	Au
A78254	Nicholas	Gyampoh	Kwabena	20/12/1980	Male	Tra
A89557	Elom	Sowah	Adzo	15/05/1990	Female	Lec

**Client Details (A03345):**

Chelsea Akua Afriyie  
Female  
18/08/2006  
Student  
0540567345

The following are the main features of the Client Centre:

##### a. Search Clients

The “Search Client” box displays all the user’s clients and allows the user to select a client to access their individual records through the Client Portal. To look up a client, enter the clients card number or name into the search box which is above the list of clients.

##### b. New Clients

*Create New Client Record*

- i. Click “New” in the [Client Centre](#) to open the New Client Record form.

OptoRec 1.0.0

New Client Record

New Record

\*Card Number:

First Name:

Surname:

Other Names:

\*Date of Birth:

\*Gender: ☐ Male ☐ Female

Occupation:

Phone Number:

E-mail Address:

Religion:

\*These entries cannot be altered once they are saved!

Save Exit

- ii. Enter the requisite information in New Client Record and click “Save” to create a new client record.
- iii. Click “Exit” to return to the Client Centre.
- iv. In the [Client Centre](#), click the refresh icon to display the new client record you created.

10	Male	Pas	0540567345
10	Male	Gr	
14	Male	Au	
10	Male	Tra	
10	Female	Lec	

Logout

### c. Editing Client Records

#### *Biographic Data*

Client personal records consists of personal information known as “biographic data”. Client records (biographic data) can only be edited in the Biographic Data form in the Clients window.

OptoRec - Clients

Biographic Data

Consult Portal

Open

Card Number:

First Name:

Surname:

Other Names:

Age:

Date of Birth:

Created On:

Gender:

Occupation:

Phone Number:

E-mail Address:

Religion:

Update Delete Exit

Help

*Change Biographic Data:*

- i. Select a client from the list of clients in the “[Search Client](#)” box. A summary of the selected client info will appear next to the list of clients.
- ii. Click “Client” in to open the Biographic Data form.
- iii. In the Biographic Data form, change the client information you wish to edit.
- iv. Click “Update” to save the changes.
- v. Click “Exit” to return to the Client Centre click the refresh icon to display changes you made.

## 5. Clinical Data

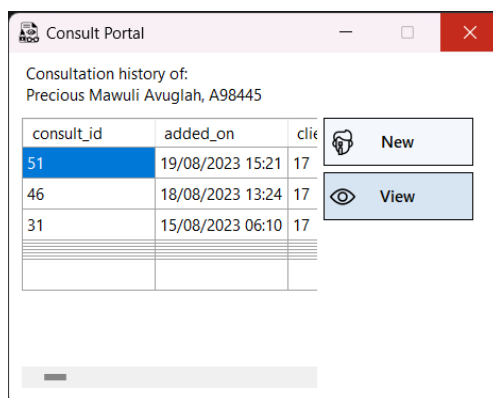
Clinical data refers to optometric data that can only be entered by a clinician. This clinical data includes:

- Cardiovascular examination results.
- VA exam results.
- Patient history.
- Internal and external eye exam results.
- Diagnoses, prescriptions and management plans.
- Clinical comments.

(There is a form for each clinical data category I just mentioned in the [Clinical window](#) menu.)

### a. Consult Portal

All clinical records can be viewed and accessed through the Consult Portal window.



The Consult Portal is opened by clicking “Open” on the [Biographic Data](#) form in the [Clients window](#).

To enter [clinical data](#), you must click “New” in the Consult Portal window to start a new consultation session.

### b. Consultations

#### *New Consultation*

- i. In the Consult Portal, click “New” and follow the prompts to open the open the Clinical window and start a new consultation session. (The Consult Portal is minimized to the task bar when the Clinical window is opened.)

- ii. In the Clinical window menu are the different clinical forms clinical data can be entered into. Either click through the items on the menu or the direction arrows to go through the different clinical forms.

The screenshot shows a software window titled "OptoRec - Clinical" with a sub-header "Cardiovascular Examination". On the left is a vertical menu with icons and labels: "Cardiovascular", "Visual Acuity", "History", "Examination", "DDx/Rx", "Quick Message", "Exit" (highlighted in yellow), and "Help" at the bottom. The main area of the window contains a patient identifier field with the text "A89556, Michael Kofi Appiah-Kubi, 45 years old" and a right-pointing arrow button. Below this are two input fields: "Blood Pressure (mmHg):" followed by a small graph icon and a text box, and "Blood Glucose Level (mmol/L):" followed by a text box. A "Save" button with a floppy disk icon is located at the bottom right of the form area.

- iii. Enter the clinical data you wish to record into the requisite forms.
- iv. Save the data you wish to record in each form.
- v. Click "Exit" in the Clinical window menu or close the window to end the consultation session close the clinical record.

**WARNING:** Once the Clinical window is exited or closed, the clinical consultation session ends. This means whatever data was recorded can no longer be altered once the window is closed. The records of the consultation can still be viewed in the [Clinical Form window](#).

#### c. Consultation History

The [Consult Portal](#) contains a list of the records of the past consultation sessions with the client.

##### *View Consultation History*

- i. Select the consultation you wish to view in the [Consult Portal window](#).
- ii. Click "View" to display the client record in the [Clinical Form window](#).

#### d. Clinical Form

The Clinical Form window displays the complete record of a clinical consultation that is selected from the [Consult Portal window](#).



**Clinical Form**

**PERFECT VISION MED EYE CARE  
EYE HEALTH EXAMINATION FORM**

Page 1 of 2

**Biographic Data**

Card Number: A03345 Gender: Female  
 First Name: Chelsea Occupation: Student  
 Surname: Afriye Phone Number: 0540567345  
 Other Names: Akua E-mail Address: chels.afriye@gmail.com  
 Age: 17 Religion: Christian  
 Date of Birth: 18/08/2006 Date of Entry: 20/08/2023

**Visual Acuity Examination**

PD (mm): /  
 Monocular PD (mm): RE LE  
 VA Unaided Aided +1 Blur PH Test  
 OD OS

**Cardiovascular Examination**

Blood Pressure (mmHg): Blood Sugar (mmol/L):

**Client History**

PC/CC: DH:  
 HPC: Allergies:  
 ODQ: SH:  
 POH: FOH:  
 PMH+PSH: FMH:  
 Differential Diagnosis:

## 6. Transactions

To record a financial transaction with a client or record the products and services the user offers, go to the [Transactions window](#).

### a. Transaction Centre

In the Transaction Centre, you can record and view receipts of financial transactions with a client. Click the “Transactions” button in the [Client Centre](#) to access the Transaction Centre or click on “Transactions” in the [Transactions window](#) menu.

**OptoRec 1.0.0**

**Transaction Centre**

Client name, card number: Chelsea Akua Afriye, A03345

**Receipt**

ITEM	QTY	UNIT (€)	TOTAL (€)

Final Cost:

**Search**

Enter product or service to search

Name	Cost	account_id	item_id	added_on
Lens wipe	50.00	1	3	17/08/2023 19:19
Ray Bands Blac...	1500.00	1	2	17/08/2023 19:04
OptoRec Test It...	0.00	1	1	17/08/2023 19:00

Buttons: Save, History, Clear, Add

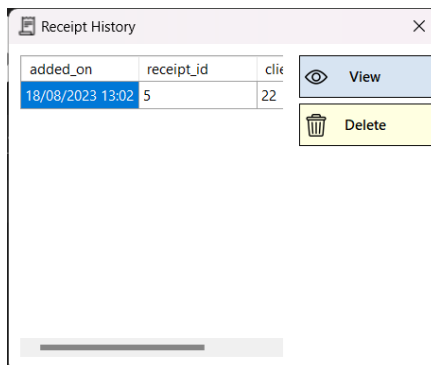
### Create and Save Receipt

- Choose an item you want to add to the receipt from the list of products and services in the “Search” box. You can also search for an item in the search bar by entering the name of the product or service.

- ii. Click the product or service to select it and click “Add” to add it to the “Receipt” box.
- iii. After adding the products or services you want to the receipt, click “Save” and follow the prompts to save the receipt.

#### *View Client Receipt History*

- i. Click “History” to open the Receipt History window.



- ii. In the Receipt History window, click on the receipt you wish to view from the list of receipts.
- iii. Click “View” to view the selected receipt.

#### *Delete Receipt*

- i. Click History to open the Receipt History window.
- ii. In the “Receipt History” window, click on the receipt you wish to delete from the list of receipts.
- iii. Click “Delete” and follow the prompts to delete the selected receipt.

#### *Print Receipt*

- i. Click “View” of the selected receipt in the Receipt History window to display the Receipt window.

Perfect Vision Med Eye Care Kotei 0503105367, 0547484611			A03345, Chelsea Akua Afriyie			Print
ITEM			QTY	UNIT (C)	TOTAL (C)	Exit
OptoRec Test Item for Accounting			2	0.00	0.00	
Final Cost: ₦ 0.00						

- ii. Click Receipt window and follow the prompts to print the receipt.

b. Products and Services

As the name suggest, the Products and Services form manages all the products and services the user offers to their clients.

Name	Cost	account_id	item_id	added_on
Lens wipes	50.00	1	3	18/08/2023 12:53
Ray Bands Blac...	1500.00	1	2	17/08/2023 19:04
OptoRec Test IL...	0.00	1	1	17/08/2023 19:00

These products and services can then be added to the client's receipt in the Transaction Centre. The Products and Services form is found in the Transactions windows. Click "Products etc." on the Transactions window menu to open the Products and Services form.

*Add Product or Service*

- To add a product or service, type the name in the "Product or Service" box and the cost in the "Cost (€)" box.
- Click "Add" to add the item to the list of products and services.
- Click "Refresh" to view the product or service you just added in the list of products and services.

*Edit Product or Service*

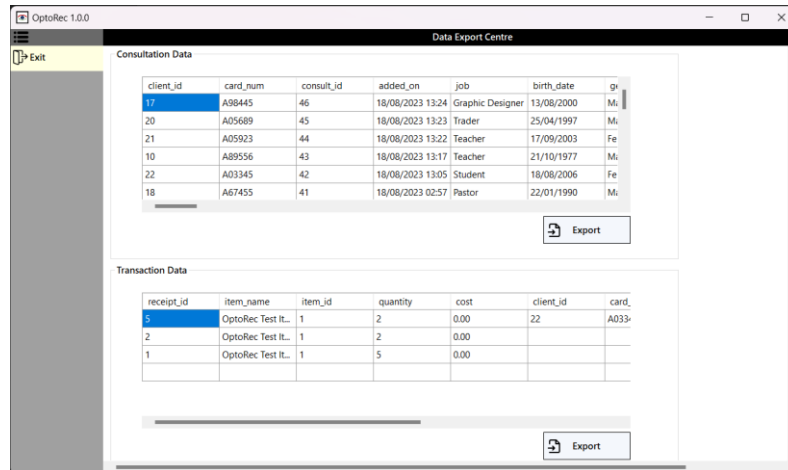
- To change the name or cost of a product or service, select the item from the list of products and services. Once selected, the item's name will appear in the "Product or Service" box and the item's cost will appear in the "Cost (€)" box.
- Edit the name or cost of the item in their respective text boxes and click "Update" to save those changes.
- Click "Refresh" to view the changes you made to the product or service you just updated in the list of products and services.

*Delete Product or Service*

- To delete a product or service, select the item from the list of products and services. Once selected, the item's name will appear in the "Product or Service" box and the item's cost will appear in the "Cost (€)" box.
- Click "Delete" and follow the prompts to delete the product or service you selected.
- Click "Refresh" to view the changes you made to the list of product and services by deleting a product or service.

## 7. Export Centre

The Data Export Centre is where client and clinical data can be exported as a CSV file, which can be further analysed in spreadsheets like Excel or in database software. Click “Export” in the [Client Centre](#) to open the Data Export Centre.

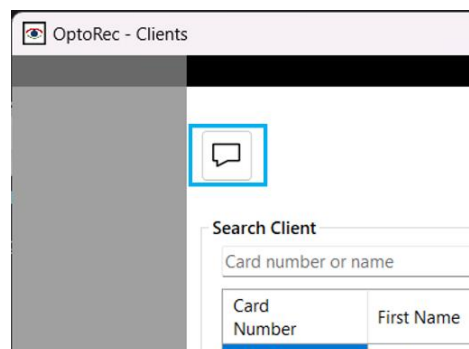


- a. Export Consultation Data
  - i. Click “Export” in the “Consultation Data” box to export consultation data.
  - ii. Click “Exit” in the Export window menu to return to the Client Centre.
- b. Export Transaction Data
  - i. Click “Export” in the “Transaction Data” box to export transaction data.
  - ii. Click “Exit” in the Export window menu to return to the Client Centre.

## 8. Quick Message

Quick Message is a message board feature in the *OptoRec* App that allows users to post brief messages in the app. Quick Message can be accessed through two different window environments which allows different users on the same account to message one another. This leveraging of the [multiple user](#) function of the *OptoRec* app enables the clinician and his staff to communicate across different computers on the same user account.

- a. Client Centre Quick Message
  - i. Click the Quick Message icon in the [Client Centre](#) form to use the feature in the Clients environment.



b. Clinical Window Quick Message

- i. Click Quick Message in the [Clinical window](#) menu to use the feature in the Clinical environment.

