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

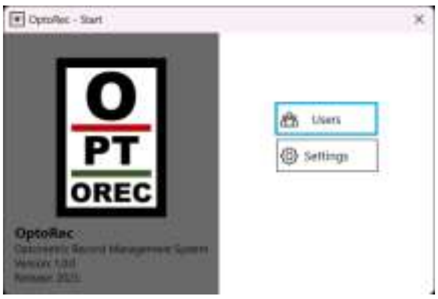
1. Introduction to *OptoRec*
   a. Main Features
   OptoRec is an optometric record management system made for the working optometrist to solve his or her everyday data needs. It is a great tool for the standard clinical setting and it is useful during outreach scenarios as well. *OptoRec* is designed 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

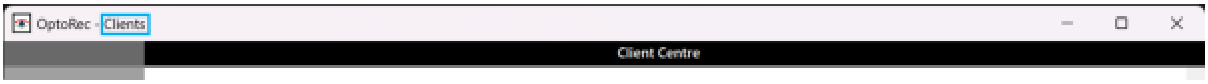
When the OptoRec app starts, it opens into the Start window. To enter the app, click “Users” to either setup or login to a user account to start using the features of the app.



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.



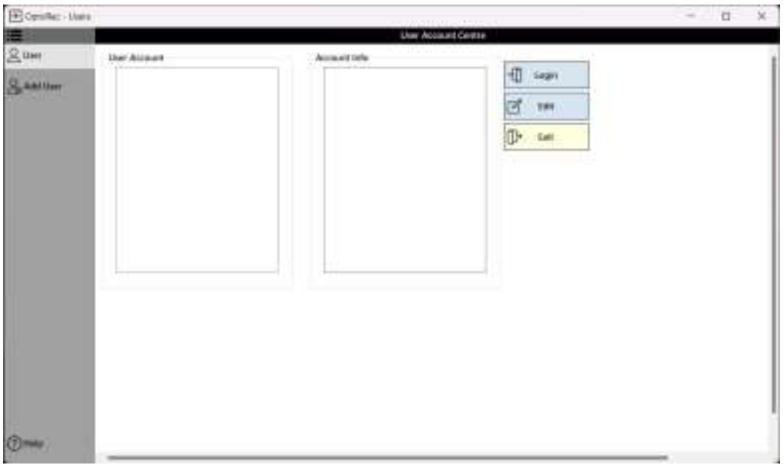
c. Clinical:
The Clinical window is the *only* environment in which clinical data can be recorded, therefore there is restricted access to this window. The Clinical window environment can only be accessed through the Consult Portal.

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.



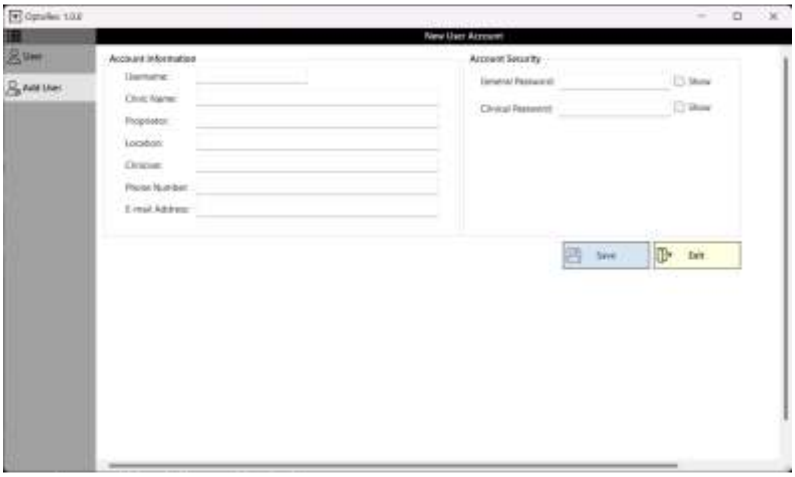
Login to Account

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

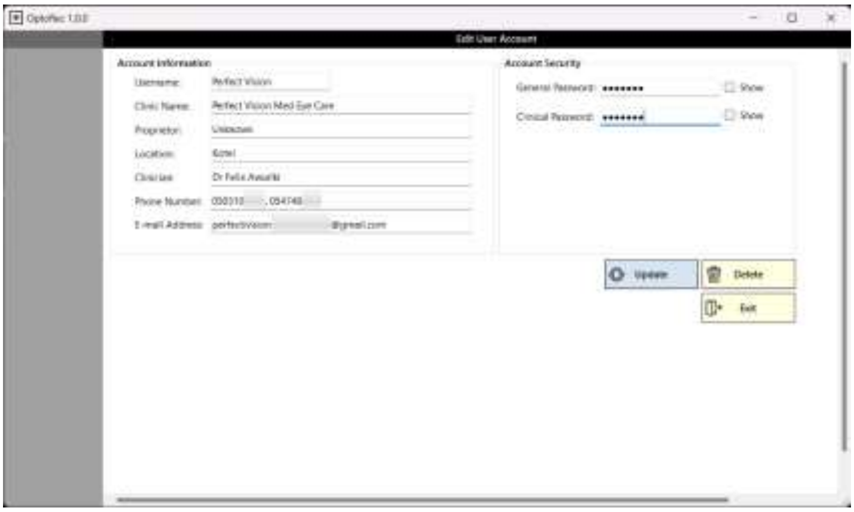
Edit User Account

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.

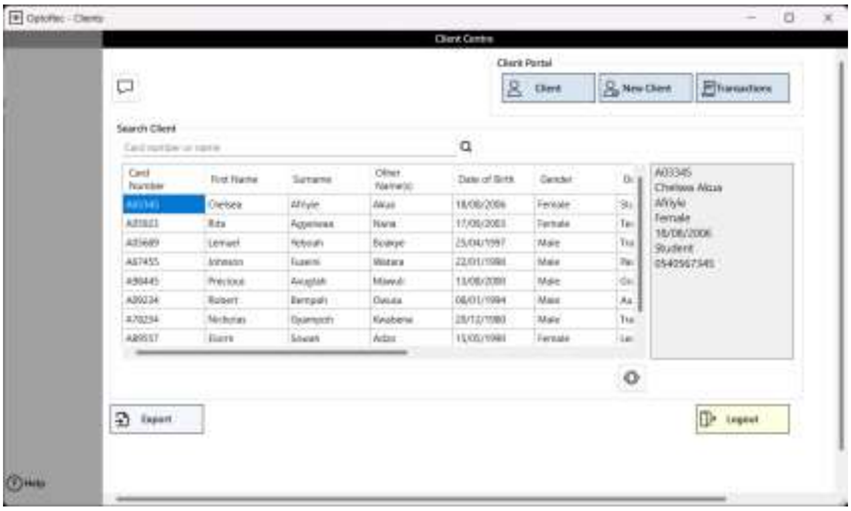


v. Click “Update” to save the changes you made.

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.



The following are the main features of the Client Centre:

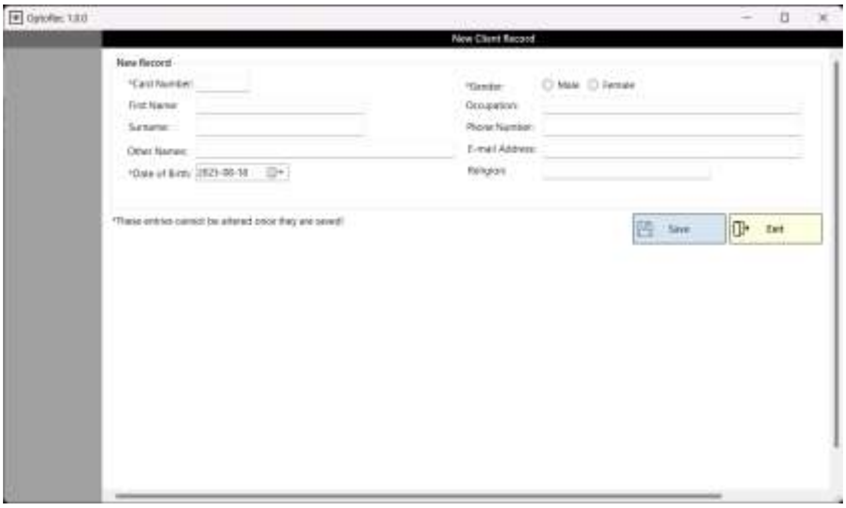
a. Search Clients

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.



ii. Enter the requisite information in New Client Record and click “Save” to create a new client record.

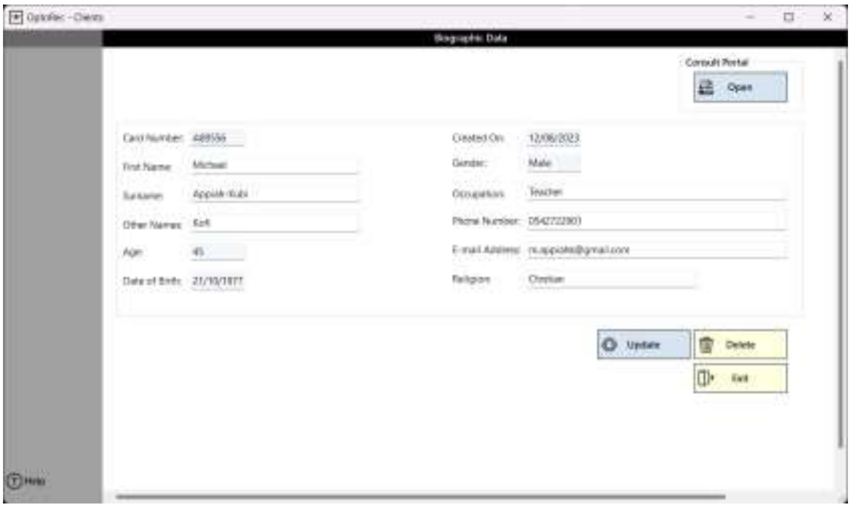
iii. Click “Exit” to return to the Client Centre.

iv. In the Client Centre, click the refresh icon to display the new client record you created.

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.



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

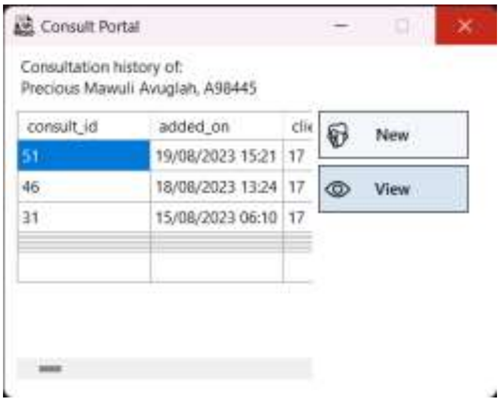
Clinical data refers to optometric data that can only be entered by a clinician. This clinical data includes:

- 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.

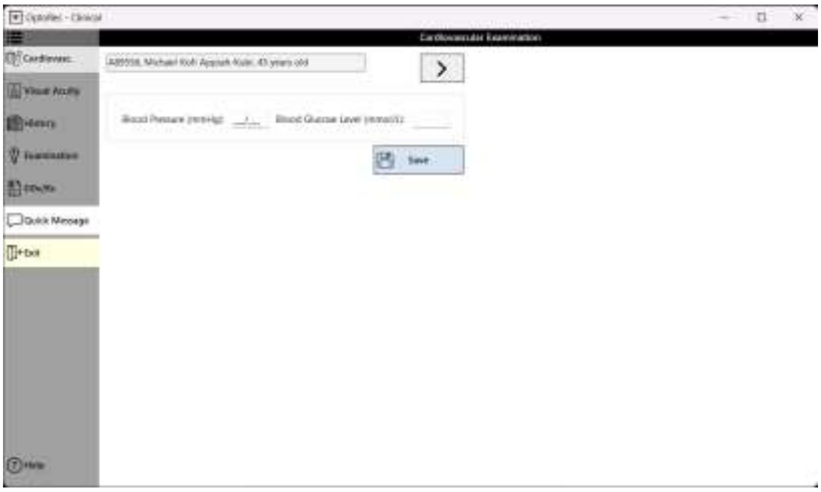
To enter clinical data, you must click "New" in the Consult Portal window to start a new consultation session.

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.



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

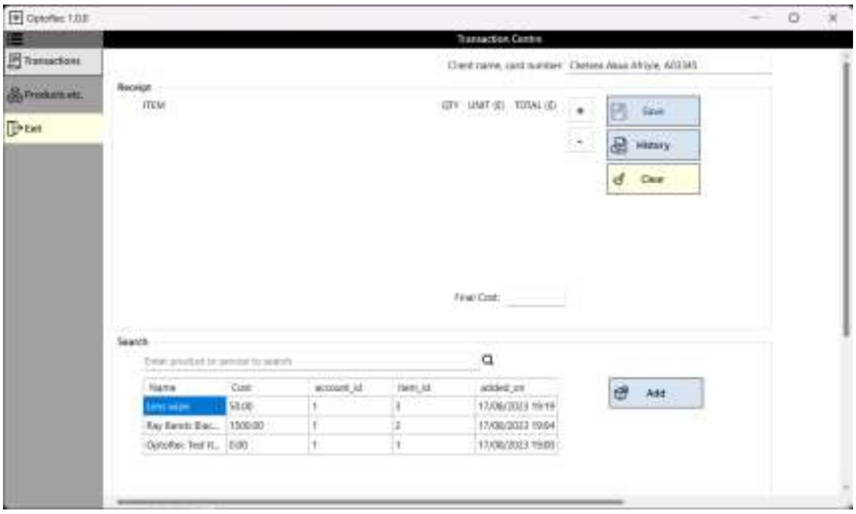
The Clinical Form window displays the complete record of a clinical consultation that is selected from the Consult Portal window.

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.



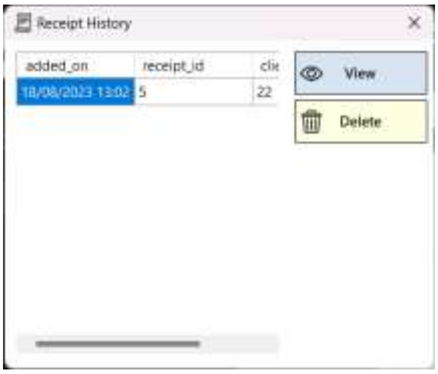
Create and Save Receipt

i. 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.



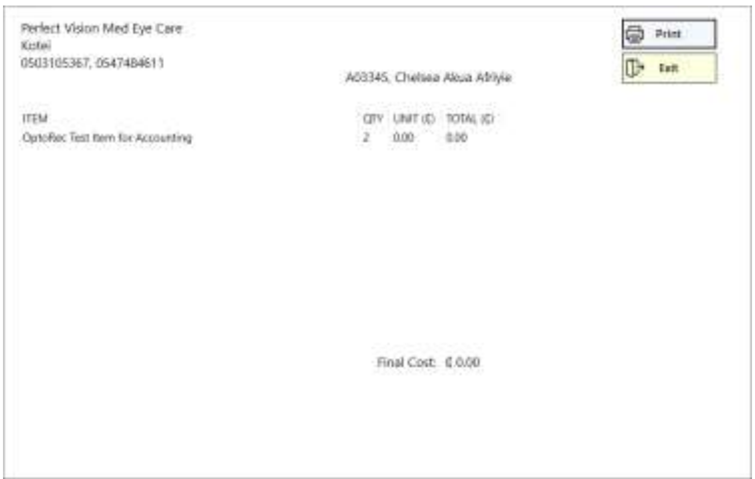
ii. In the Receipt History window, click on the receipt you wish to view from the list of receipts.
iii. Click "View" to view the selected receipt.

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

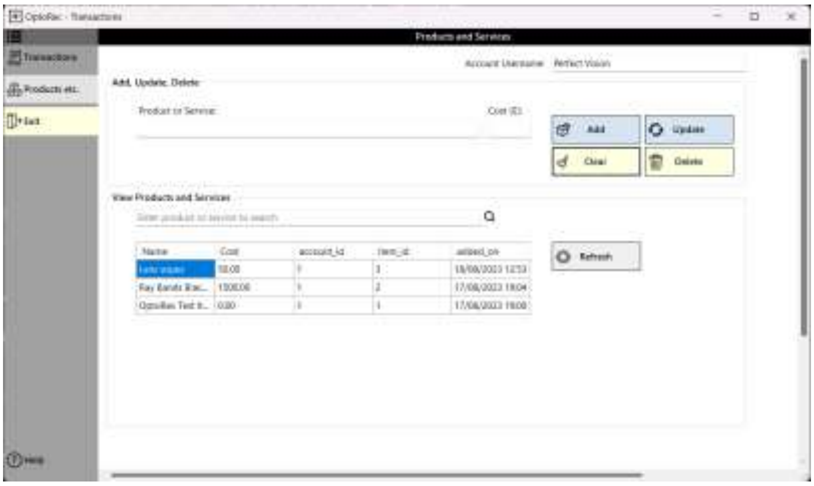
i. Click "View" of the selected receipt in the Receipt History window to display the Receipt window.



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.



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

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

Edit Product or Service

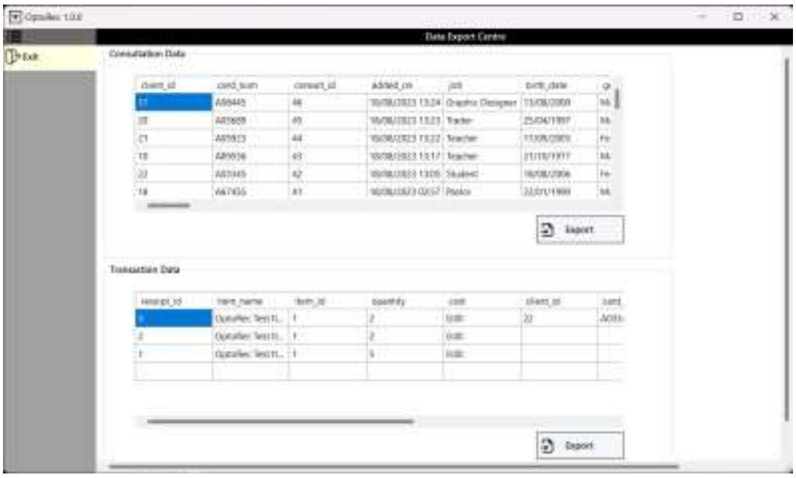
i. To change the name or cost of a product or service, select the item from the list of products and services. Once selected, the item's name will appear in the "Product or Service" box and the item's cost will appear in the "Cost (₵)" box.
ii. Edit the name or cost of the item in their respective text boxes and click "Update" to save those changes.
iii. 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

i. 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.
ii. Click "Delete" and follow the prompts to delete the product or service you selected.
iii. 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.

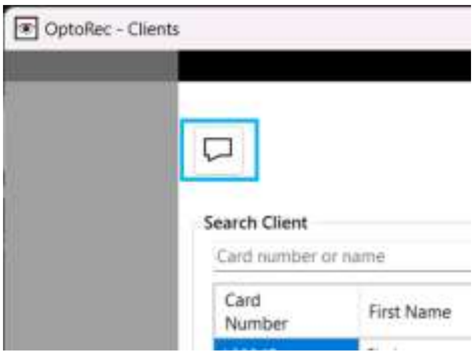


a. Export Consultation Data
   i. Click “Export” in the “Consultation Data” box to export consultation data.
   ii. Click “Exit” in the Export window menu to return to the Client Centre.
b. Export Transaction Data
   i. Click “Export” in the “Transaction Data” box to export transaction data.
   ii. Click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