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 a basic electronic medical records system for optometry clinics and practices. *OptoRec* is designed 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.

    The software is designed to record and manage the information that is produced during the day-to-day operations of an optometry clinic or practice.
    This information includes:

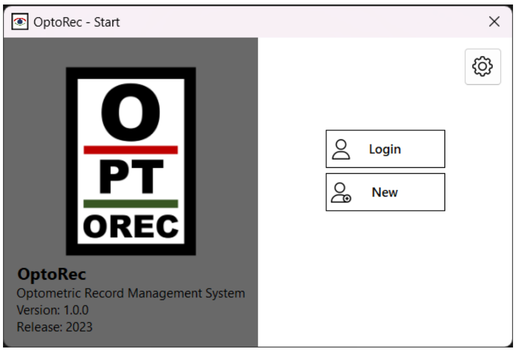
- Client personal information.
- VA exam results.
- Patient history.
- Internal and external eye exam results.
- Diagnoses, prescriptions and management plans.
- Other optometric data.
- Products and services on offer.

    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
    a. Start Window

The Start window is the first interface a user will interact with and it is the portal to all the features of the *OptoRec* app. Now to use all the features of the app, you must have a User Account. If the user already has an account, click "Login" in the Start window and follow the prompts to login to the account. If the user does not have an account or wants to setup a new user account, click "New" in the Start window to open the form to setup an account.



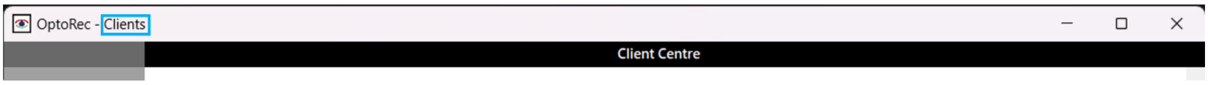
The *OptoRec* user interface consists of three main environments. They are the User Account window, Clients window and the Clinical Consultation window.

b. User Account:

In this window, a user can either setup a new account or modify an existing account.

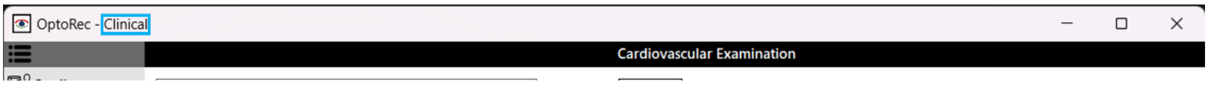
c. Clients:

The Clients window is the gateway to the core features of the app such as managing client records, recording clinical consultations and managing payments.



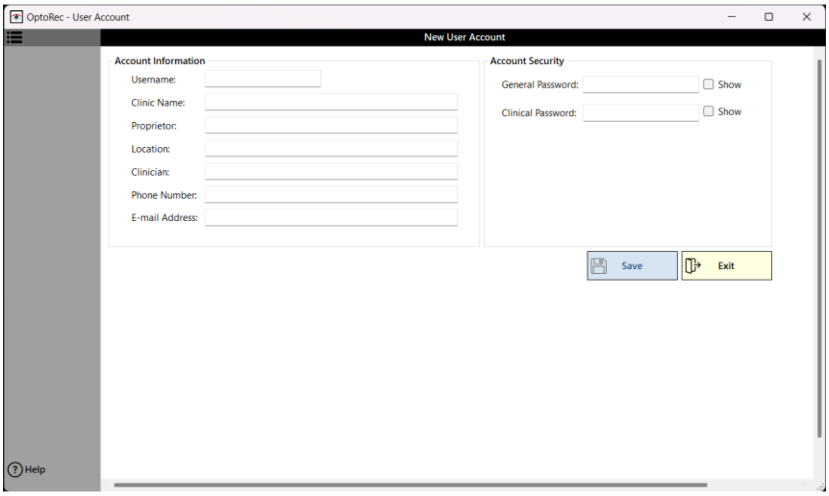
d. Clinical Consultation:

The Clinical Consultation 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.



3. Setup and Edit User Account

a. Setup New User Account



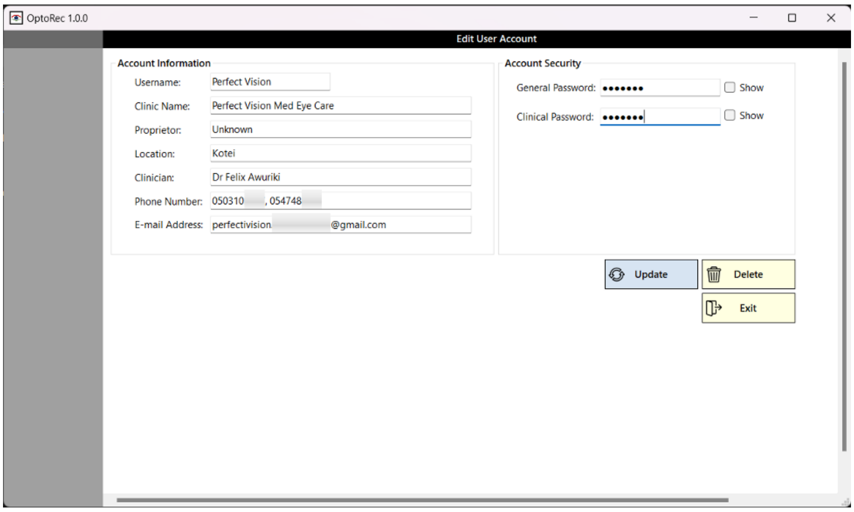
Setup Account

i. Click "New" in the Start window 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 Start window
v. In the Start window click login to access the account you setup.
vi. In the login prompt, enter your accounts username and general password and click "Login" to enter the user account.

b. Edit Account Info

Edit User Account

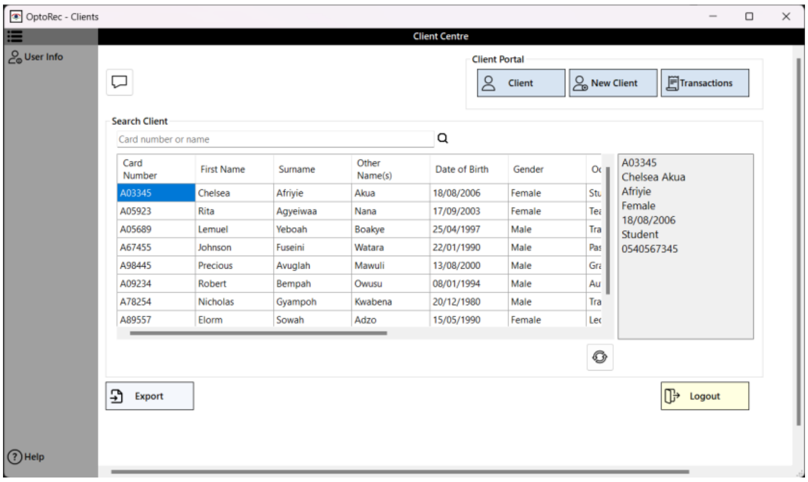
i. Go to the Client Centre in the Clients window.
ii. Click “User Info” in the menu panel on the left-hand side of the window.
iii. In the Edit User Account form, change the account information you wish to edit.



iv. Click “Update” to save the changes you made.
v. Click “Exit” to return to the Client Centre.

4. Client Centre

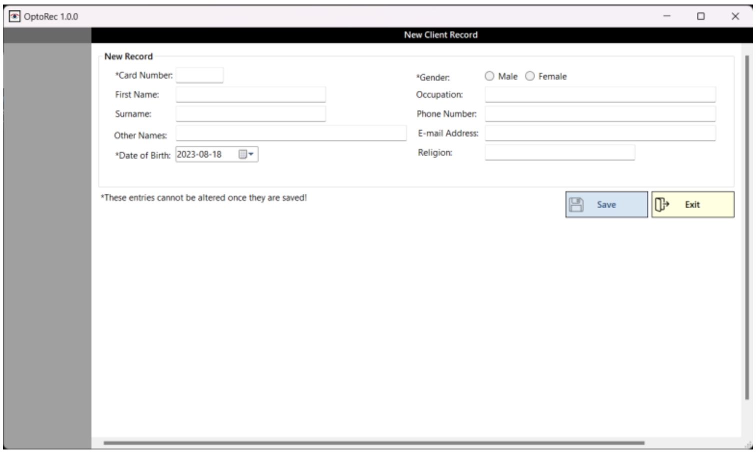
When user logs into their account, the app opens into the Client Centre. The Client Centre is the hub for managing all client records, including clinical data of each individual client.



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.

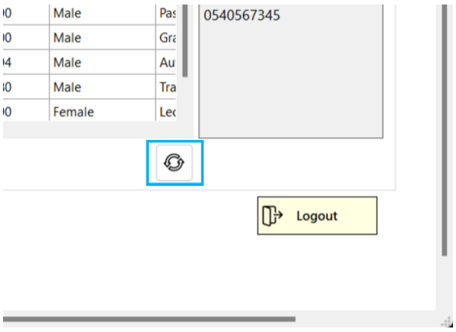
b. New Clients
Create New Client Record
i. Click “New” in the Client Centre to open the New Client Record form.



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.

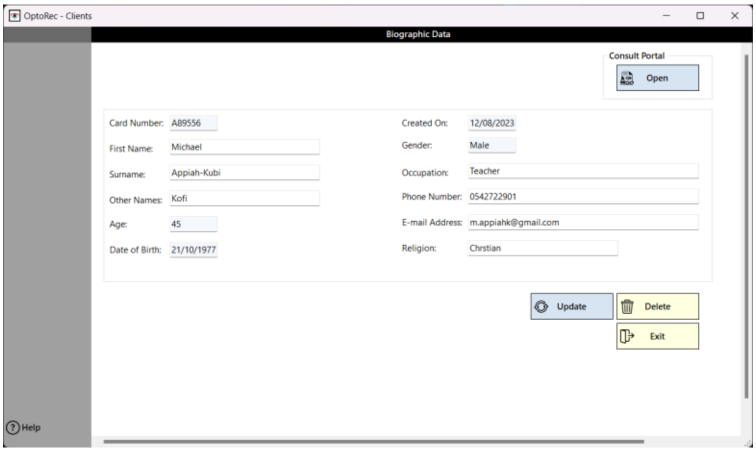
iv. In the [Client Centre](), click the refresh icon to display the new client record you created.



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

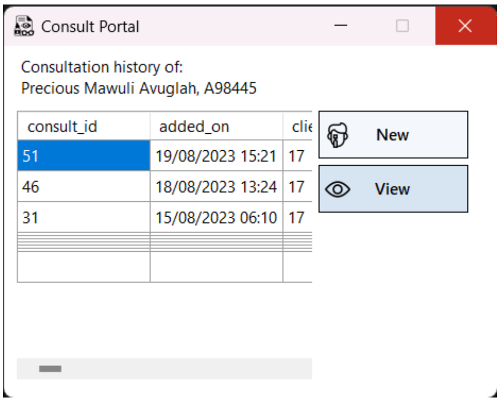
Clinical data refers to optometric data that can only be entered by a clinician. This clinical data includes:

- 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 Consultation window menu.)

a. Consult Portal

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



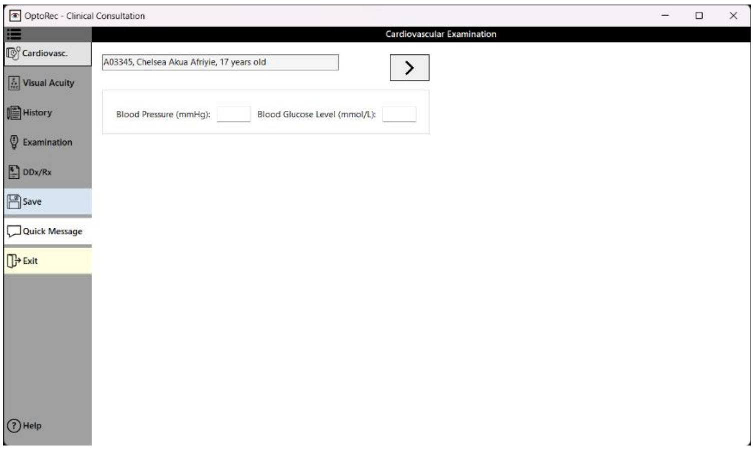
The Consult Portal is opened by clicking “Open” on the Biographic Data form in the Clients window.

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.

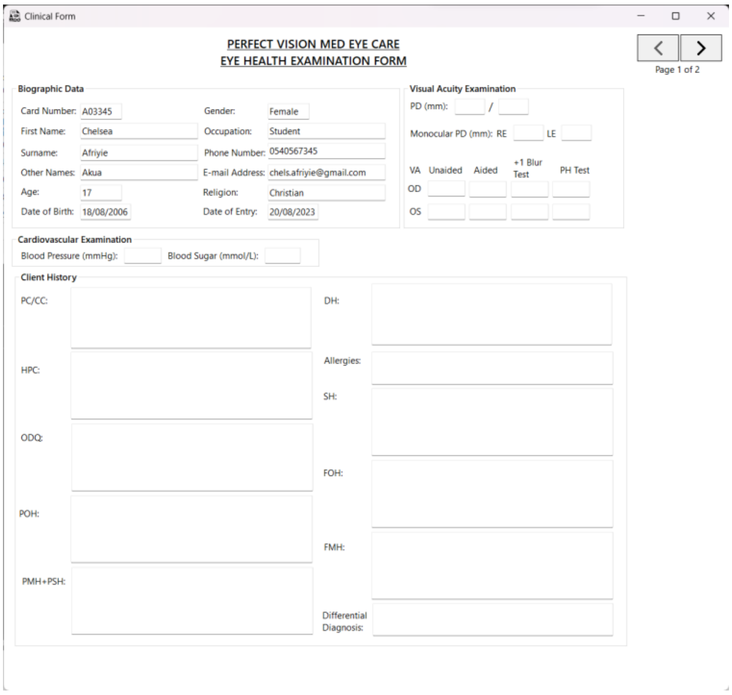
View Consultation History

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.

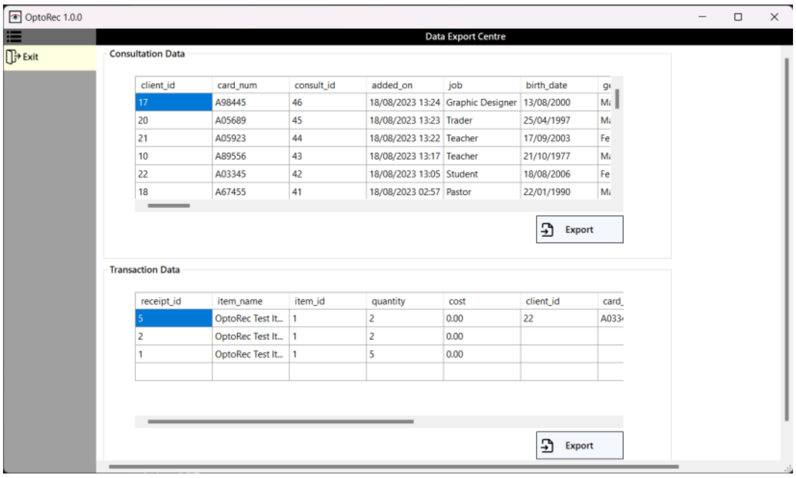
d. Clinical Form

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



6. 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.

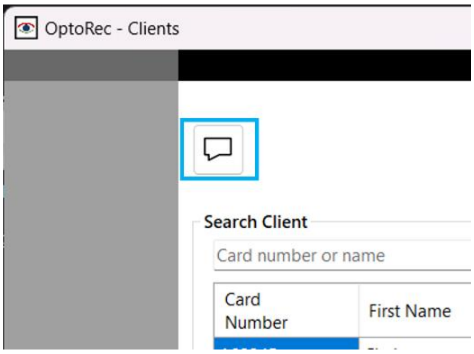
ii. Click “Exit” in the Export window menu to return to the Client Centre.

7. 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.