Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

User Guide to Clinical Records

Contents

The Pre-Exam

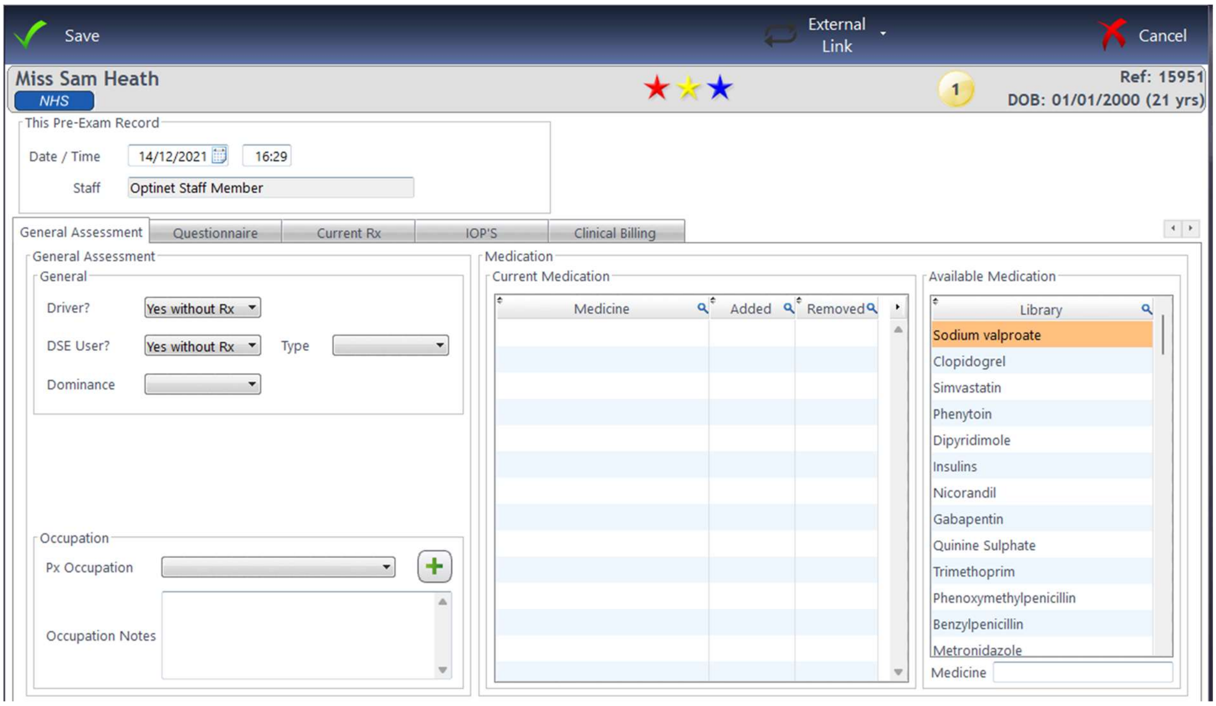
The Pre-Exam function in FLEX allows staff members (normally OAs / Receptionists) to add basic information before a patient goes through to see the Optometrist, saving them time in the testing room.

- General Px information (are they a driver, computer user, their occupation)
- Medications. Some practices would consider this more the role of the Optometrist.
- Pre-Examination Questionnaire
- List the Current Rx (copy over from the last Dispense in practice or enter an outside Rx)
- Enter Pressures / Fields data – sometimes done before the Px goes through.

To add a new Pre-Exam Record, click on the **New** button and select **Pre-Exam Record.** This is shown below.

Once into the Pre-Exam, there are four tabs which are detailed below. Note that the **Date / Time** and **Staff** member are automatically filled in:

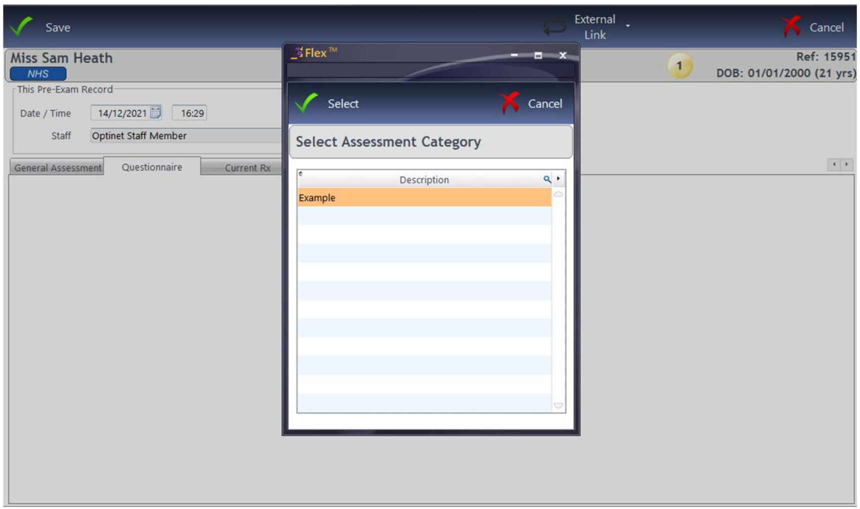
General Assessment



This is the same as the Medical Assessment in the main Sight Examination Record. Whether the patient is a **Driver** and / or **DSE User** (Display Screen Equipment) can be noted, along with their **Occupation** which can be chosen from the list. If the required occupation is not in the list, press the green **+**
to add one, which will then be available in the future. **Occupation Notes** can also be added here.

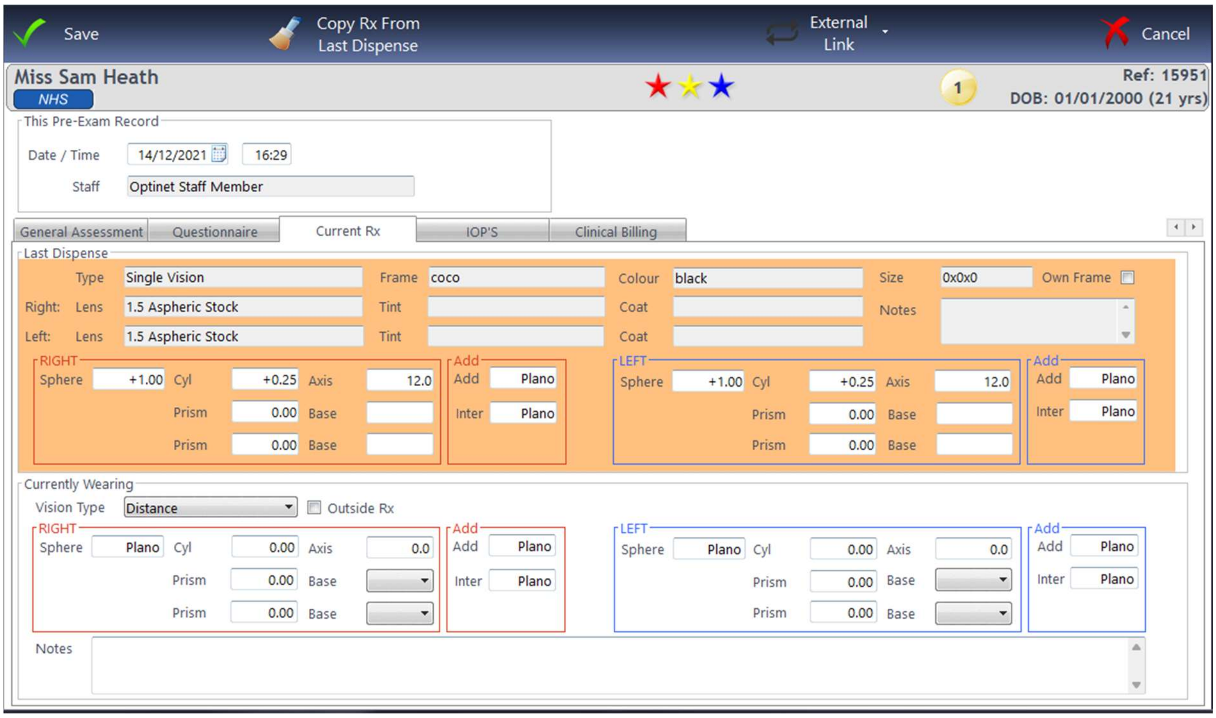
Medication details can be taken on the right-hand side, although many practices prefer to leave this information for the Optometrist to fill out.

Questionnaire



In a similar method to the C, questions can be asked and answers taken, either from the dictionary provided / created or by typing in your own answers. This is useful for the New / Returning Patient Questionnaire.

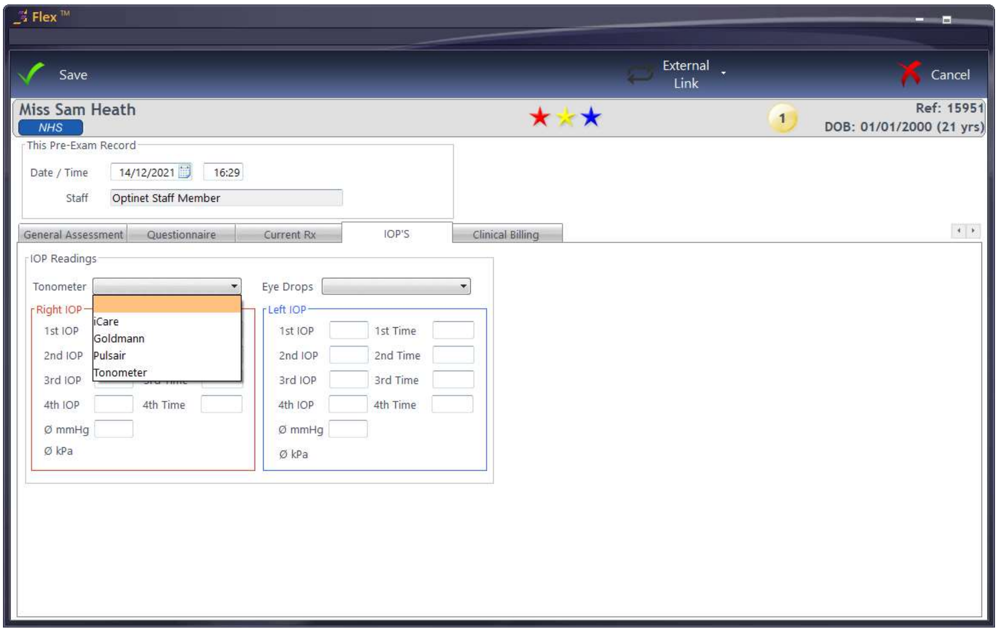
Current Rx



If the patient has previously had a Dispense through FLEX, the RX from which they were dispensed will appear under **Last Dispense**. To use this for their **Currently Wearing** prescription, click the **Copy Rx from Last Dispense** button.

If the patient has not previously had a Dispense through FLEX, fill out the **Currently Wearing** boxes. Most practices will tick the **Outside Rx** box, **Notes** are also available for further information to be added.

IOP's



Finally, **IOP Readings** can be entered. Select the **Tonometer** used and enter the values. As IOP readings are entered, an average is automatically calculated, regardless of how many of the available four boxes have data entered. By using the **TAB** key on the keyboard to cycle through the boxes, the times of the readings are automatically entered but this can be over-written.

Press **Save** and this detail will then be available to the Optometrist:

- Medical Assessment screen is auto filled
- Current Rx can copy through to Clinical Refraction

Adding a Clinical Record onto the system

To create a new Sight Test, click to **New** at the top of the patient record and choose **Sight Exam Record.**

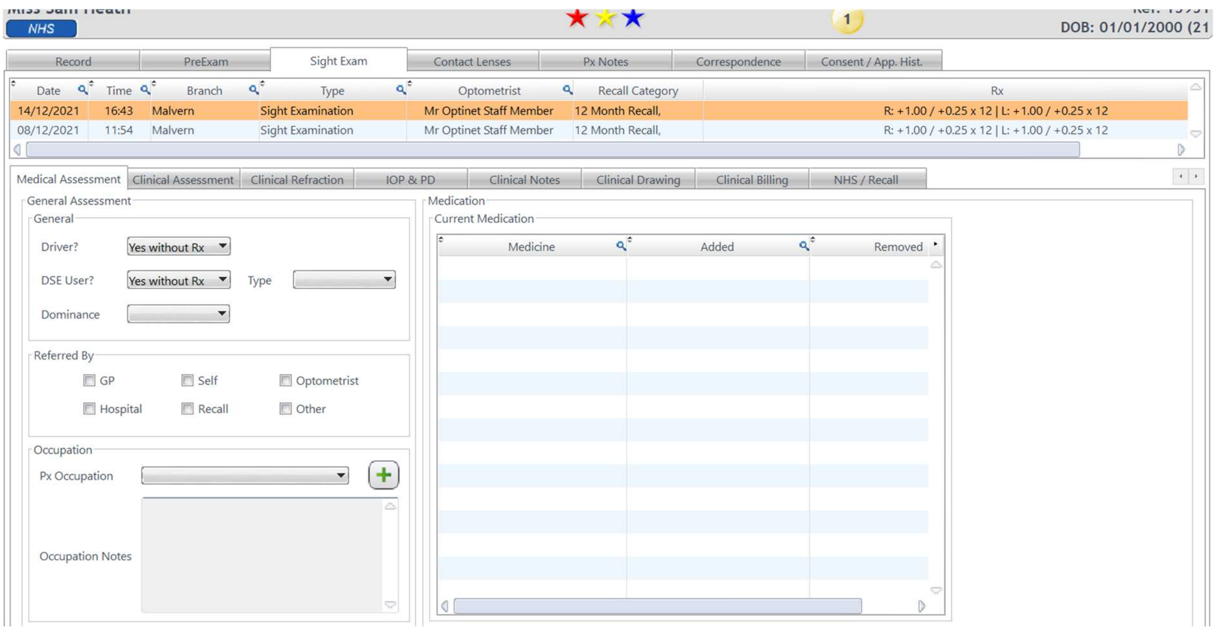
Medical Assessment

The start of the Examination is the Medical Assessment tab. An overview of the record and of the **Previous Examination Result** (if applicable) are shown towards the top of the screen. Press **View Previous** to open these up in a new window.

In the **General Assessment** section, drop down boxes are available for answers to basic questions such as whether the patient is a **Driver**, **DSE** (Display Screen Equipment - Computer) **User** and what their **Occupation** is. If their Occupation is not listed, the green **+** symbol can be used to add it. **Occ. Notes** (notes about their job) can also be added at this stage. This will be populated from the Pre-Exam if used.

To the bottom-right of the screen, **Medication** can be added. Medication can be "Dragged and Dropped" across from the **Available Medication** window, or a new **Medicine** can be added at the bottom of the screen. When this is added, it asks you if you would like to add it to the Dictionary.

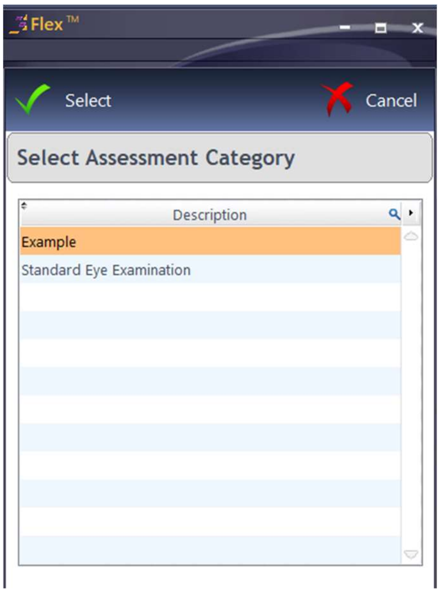
Right-click on a medication to **Remove** it. It will strike a line through it and how the date it was removed. Right-click again and choose **Purge Old Medication** to remove all previous medications which the patient is no longer on. The screen is shown below.



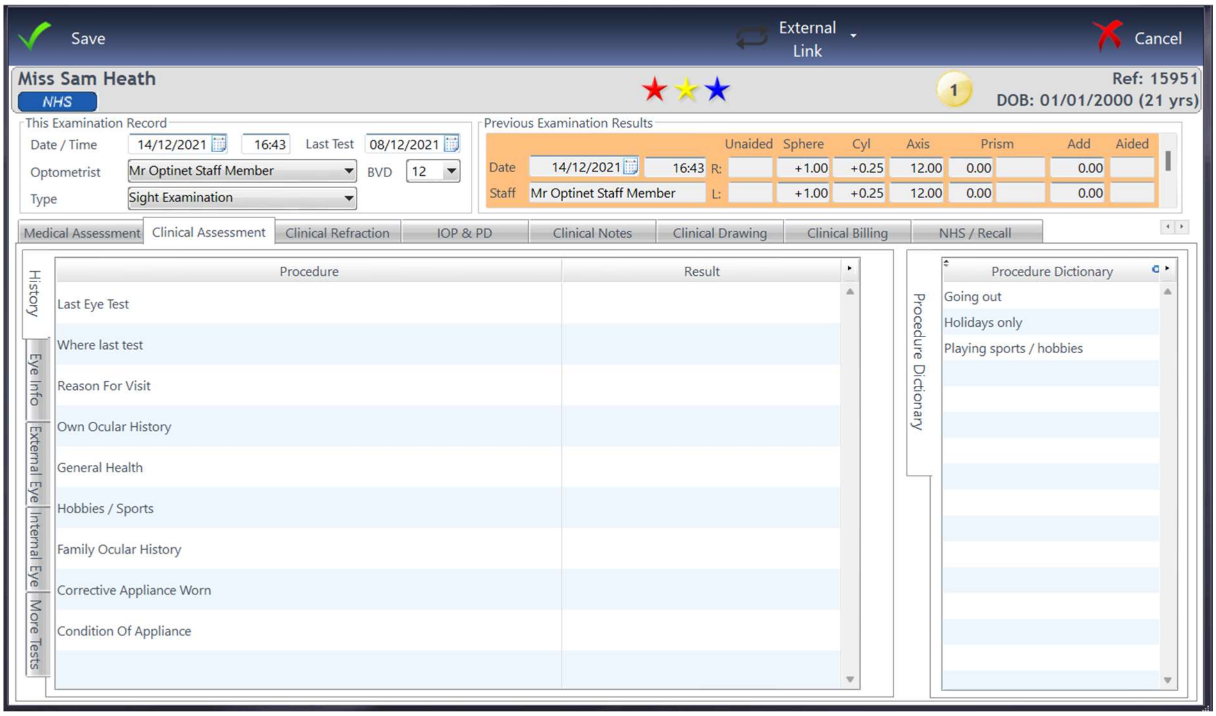
Clinical Assessment

The Clinical Assessment module is used to record the examination. The Clinical Module offers a host of customisations so Optometrists can tailor their Examinations, for example the **Dry Eye Assessment** and **Standard Eye Examination** shown below, the tabs in each exam, the procedures and the dictionary items associated to them.

When the **Clinical Assessment** tab header is selected, it will ask which type of examination is to be conducted. Choose an exam type using the window below:



The window below will then appear (may vary slightly depending on your setup)



The tabs for the examination are shown on the far left (**History, Eye Info** etc.). The **Procedures** ("Questions") are shown towards the left, and the **Results** ("Answers") will be entered in the middle of the screen.

To enter a result, choose a result from the **Procedure Dictionary**. In windows with two columns, double-clicking or dragging and dropping will have the same result. For tabs with three columns (split for both eyes), double-clicking or dragging and dropping will put the result for both eyes: drag and drop into only one eye (**Right** or **Left** column) for the result to only appear in one eye.

Multiple results can be entered, or double-click into the **Result / Right / Left** boxes to enter your own text.

Clinical Refraction

This is where the Rx is entered. Again, the **View Previous** facility is available.

Clinical Users can enter up to six types of test, and choose one as the Given. The number of tabs shown (between 1 and 6), and their names, can be customised within the Examinations > Clinical Tab of the Setup menu > Refraction. The Pre-Exam results can automatically populate

Clinical users can use the **Copy** button at the top of the window to copy results from a **Previous Rx**, from one Rx to another (e.g. **Last Test to Wearing**), and from Right **to Left** as necessary.

Clinical users can also **Transpose** the Rx accordingly.

As values are entered, press **Tab** to move between boxes. FLEX will validate data where necessary (for example if a Cyl has been entered, the Axis cannot be blank). The VA's can be entered in any format, FLEX will automatically enter "6/" and "N" as necessary.

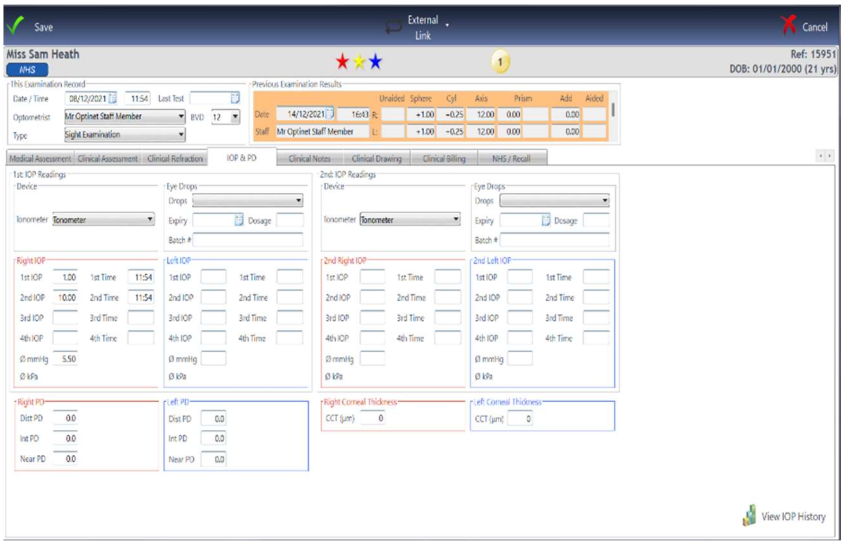
When the **Right Addition** is entered, the **Left Addition** will be automatically filled out, and the **Intermediates** and **Nears** for both eyes automatically calculated.

Note there is also a tick-box to mark a **Balance Lens**.

IOP & PD

In this tab, we enter the Inter-Ocular Pressures and Pupillary Distances. Again, the **View Previous** function is available.

The **Tonometer** being used for the Primary and Secondary set of **IOP Readings** can be set here. Note that the intention of the **2nd IOP Reading** is for results taken within the same episode, and not on a future date.



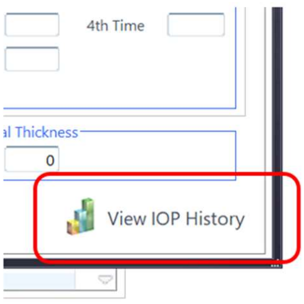
You can then specify, if relevant, any **Eye Drops** used, their **Expiry, Dosage** and **Batch. Corneal Thicknesses** can also be entered on this screen.

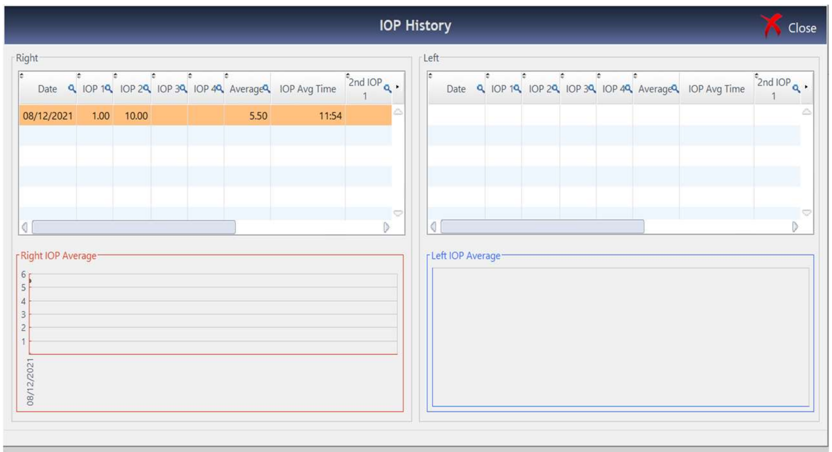
As IOP readings are entered, an average is automatically calculated, regardless of how many of the available four boxes have data entered. By using the **TAB** key on the keyboard to cycle through the boxes, the times of the readings are automatically entered.

Optometrists who enter a PD reading as part of the examination can enter details at the bottom of this screen. The Dispensing Optician can enter or update the PD at point of Dispense. If an overall PD of 66 is entered in the Right PD Dist., it will automatically split the values for Right and Left. These can be changed manually, and values under 49 will not be split.

Note: Only Clinical users can see the average kPa (Kilo Pascals). Non-clinical users can see the mmHg (millimetres of mercury) readings.

Note the **View History** button at the bottom-right of the IOP window. Opening this will show a graphical display of reading over time, including any readings entered on the Pre-Exam screen:





Clinical Notes

Both Clinical and non-Clinical users will now move onto the "Clinical Note screen.

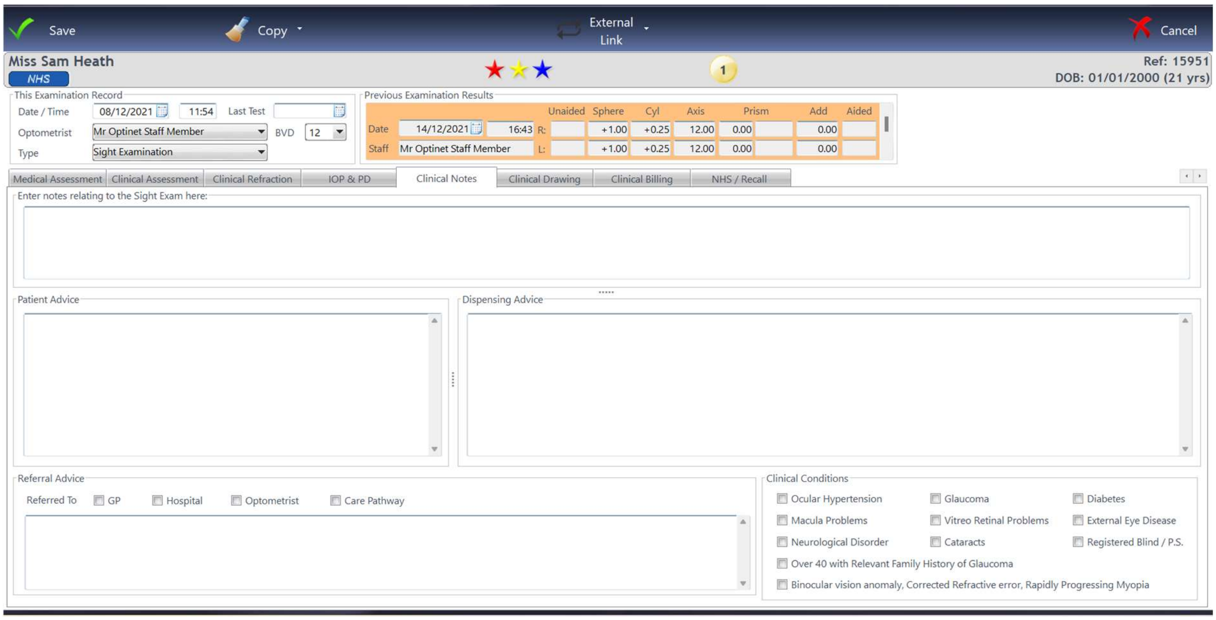
In this tab, clinical and non-clinical users can enter Clinical Notes.

"**Notes relating to the sight test**" and "**Patient Advice**" can print out on Patient Rx templates, and are available for reference.

The **Dispensing Advice** will be carried forward to the "Dispensing Notes" box in Dispense Wizard whilst **Referral Advice** will populate on a GOS18 or private referral form which can be printed through the Patient Record.

Use the "Insert Paragraphs" function to insert chunks of data into these notes boxes - most commonly used for Optom Notes and Patient Advice. Right-click your mouse to Insert Paragraphs. These can be set up in Letter Templates in Menu > Setup > Communication.

Tick-boxes for **Referred to** and **Clinical Conditions** can be entered. All of this data (like all data entry in FLEX) populates "merged fields" - so data can easily be imported into letters and documents.



Right-click and choose "Insert Paragraphs" to insert frequently used text. (These can be setup within Setup> Communication > Letter Paragraphs > Letter Paragraph tab).

Clinical Drawing

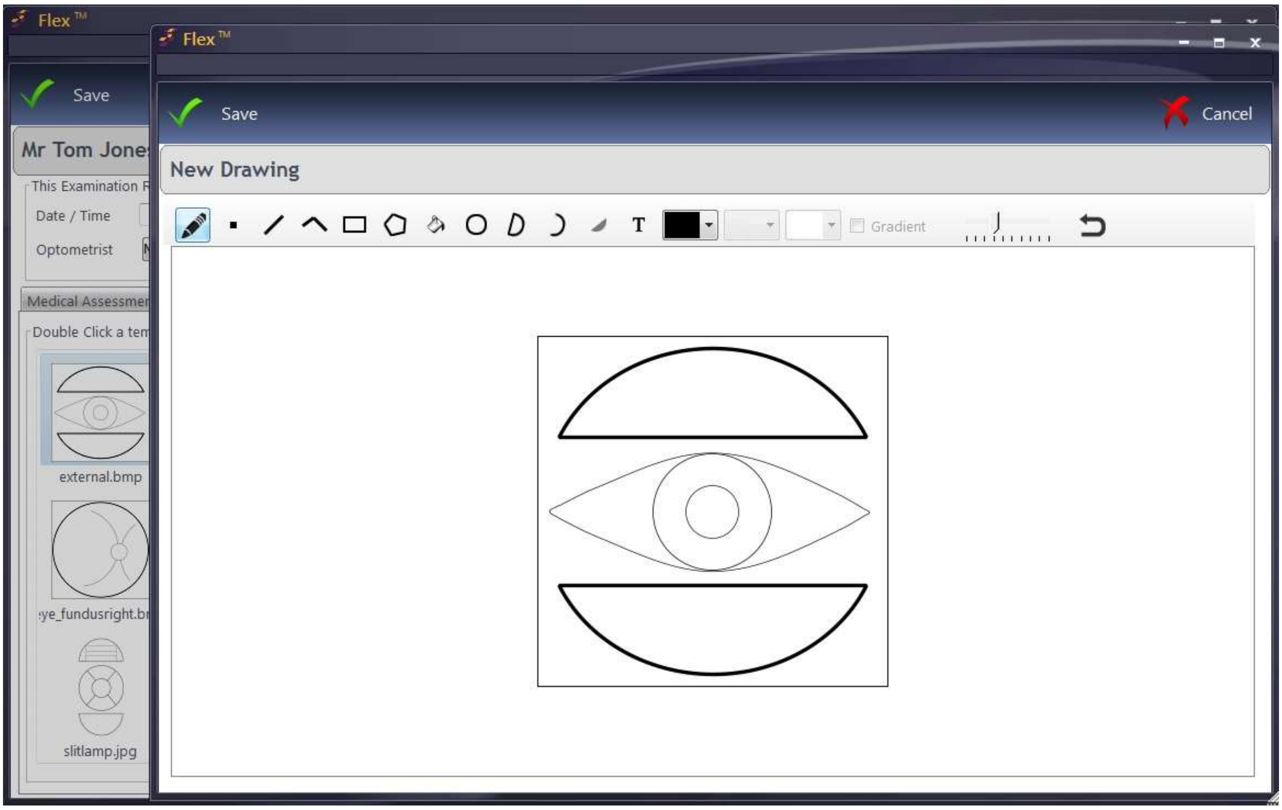
Within the Clinical Drawing section, an Optom can detail and note any abnormalities observed. Images can be imported or the templates can be used, which can be annotated with the drawing tools and saved as needed.

Select a template by double clicking on it:

An overview of the drawing tools (left to right):

1. Freehand Pencil
2. Dot
3. Line
4. Connected Line (left-click to "corner", right-click to end)
5. Rectangle
6. Polygon: Free-draw a shape (right-click to end)
7. Fill: Insert a colour (default to black as shown in box)
8. Circle / Oval
9. Semi-Circle
10. Arc of a circle
11. Chord
12. Click to enter text; brings up a box.
13. Select a colour for any of the tools.

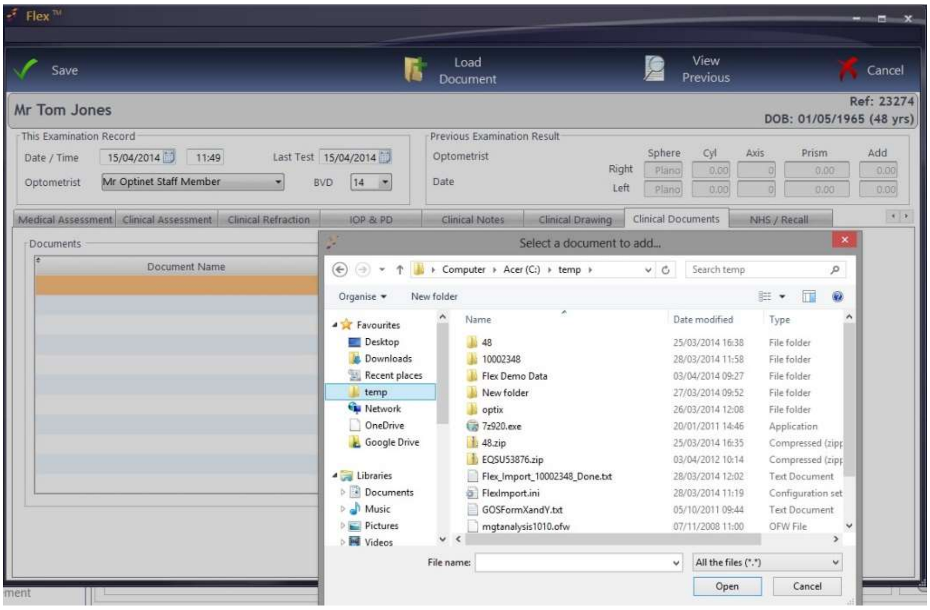
End slider: zoom
Arrow: Undo feature



Press **Save** when complete, and then move onto the Clinical Documents tab.

Clinical Documents

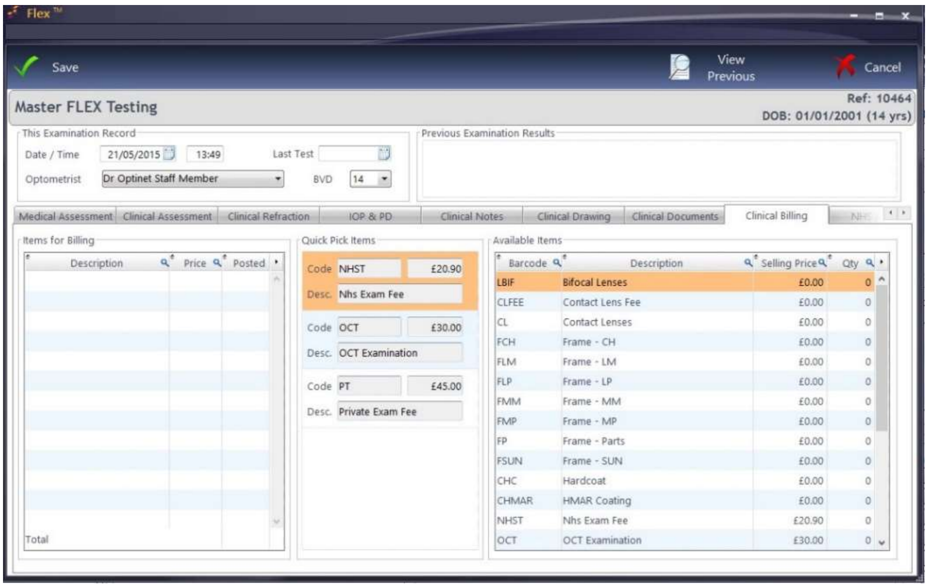
Optoms can attach any Clinical Documents required to the assessment. Click **Load Document** and browse to the relevant file in Windows. Press **Open** in the box and it will be added to the assessment.



The Image Manager in FLEX means that the software can "listen" to the network drives where clinical imaging is saved and automatically import these images onto the Clinical Record. Give us a call on 0845 313 0233 and we can set this up for you.

Clinical Billing

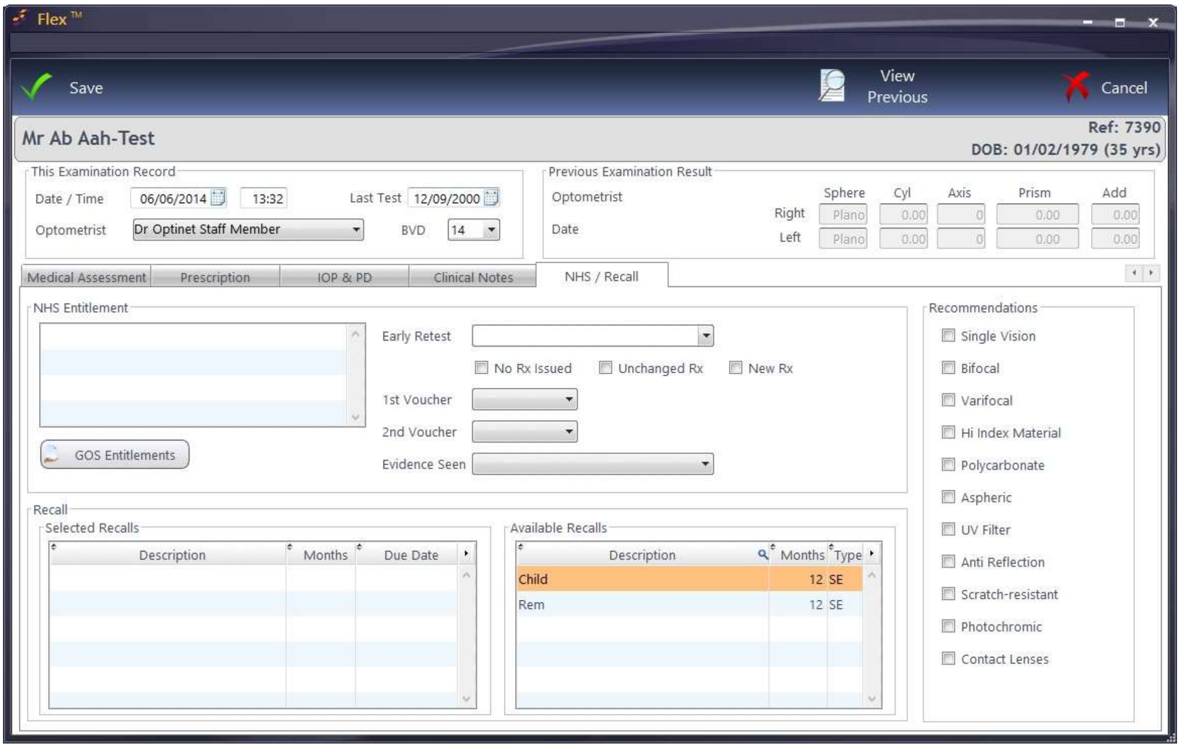
The Clinical Billing section allows Optometrists to start a receipt for a patient in the testing room. The screen is shown below.



The sundry product group is shown in the right-hand third of the screen under **Available Items.** In the setup, **Quick Pick Items** can be set, so the most commonly used items can easily be added to the patient bill. Double-click to add an item into the **Items for Billing** window.

NHS / Recall

A **Recall** must be added to a Sight Exam Record before it can be saved. Indeed, you will not be able to **Save** the record until one (or more) has been added. The screen is shown below.



Any **NHS Entitlements** the patient has are shown, and these can be added to using the **GOS Entitlements** button. Reasons for an Early Retest, the Rx status, Vouchers used and evidence seen can also be entered. The values in the drop-down menus can be edited here

Recommendations can be entered in the right hand panel; these will be reflected in the Dispense screen for the Dispensing Optician.   Finally, the **Recall** schedule can be set by selecting an option from the **Available Recalls** area. One Sight Exam (SE) can be set, while unlimited multiple Additional Exams (AD) can also be added: For example, the next sight examination may be in 12 months, but a pressure check is required in 4 weeks. Additional recalls can be customised here

FLEX will then automatically give the **Due Date** based on how many **Months** the default is. The **Months** can be updated, and the **Due Date** will automatically update.

You can now press **Save**. A "flash of green" will go across the screen as the Patient Timeline populates according to the recall schedule.

The Sight Exam Record is now complete!

For customisations available, please move on to section 2.

Section 2: Updating the Clinical Setup

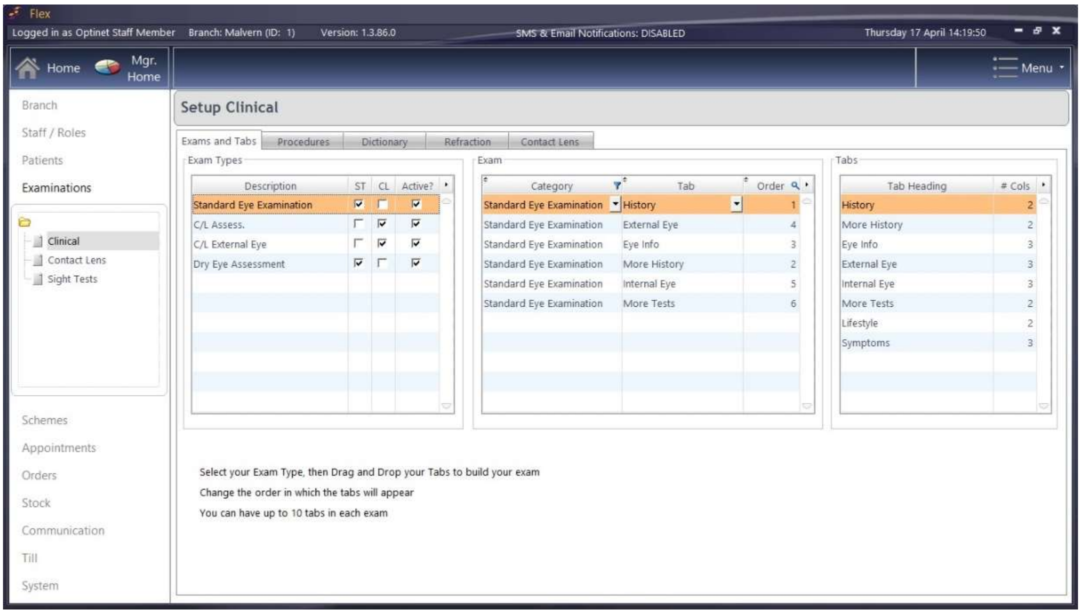
Click to Menu – Setup – Examinations - Clinical

Exams and Tabs:

Exam Types: The descriptions of the types of exams available in the [Clinical Assessment](). To add a new item, double click in the first free line and enter the text. It can then be set for **Pre** (Pre-Exam), **ST** (Sight Tests), **CL** (Contact Lenses) or a mix, and needs to be marked as **Active?**. Right-click to **Delete** an entry.

Exam: The **Tabs** that make up the **Exam** can be dragged and dropped across from the **Tabs** table, and their **Order** defined. Right-click to **Delete** an entry.

Tabs: The tabs mentioned in the above line can be re-named here. They will have 2 columns (**# Cols**) if it is a simple "question and answer" (appears as**Procedure - Result)**, or three is the "answer" is specific to a certain eye (appears as **Right - Procedure - Left**). To add a new item, double click in the first free line and enter the text. Right-click to **Delete** an entry.

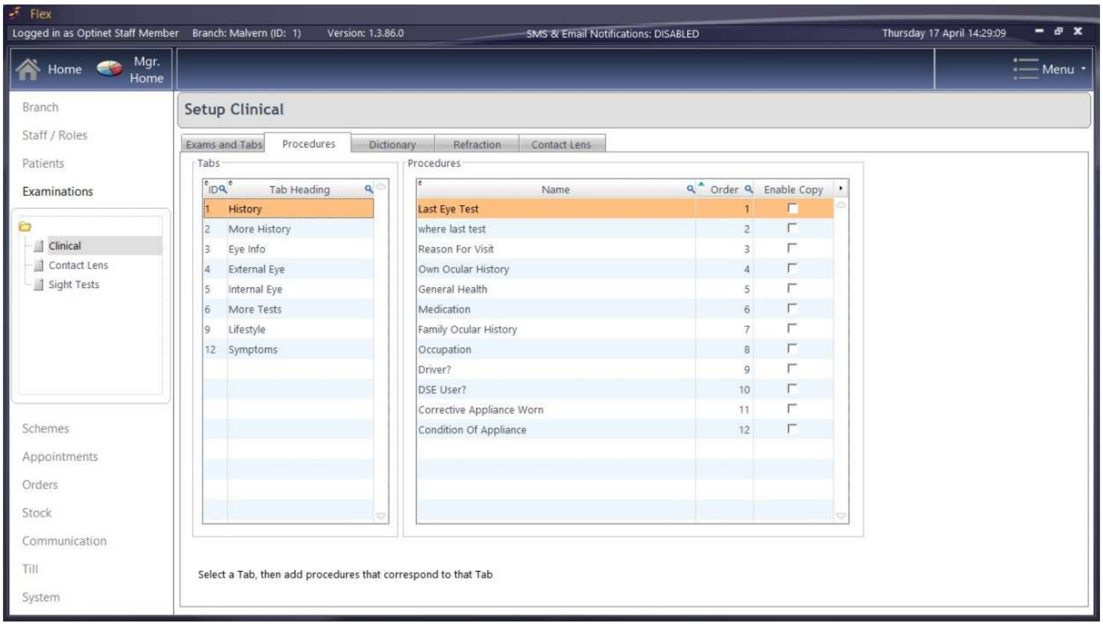


Procedures:

The questions that appear in the **Tabs** can be personalised and the orders changed.

Double click on the number to change the **Order**, or click to a different **Tab Heading** to view the different procedures in different tabs. To add a new item, double click in the first free line and enter the text.

Ticking **Enable Copy** means that Optometrists can quickly populate results where answers will seldom change (for example Medication or Family Ocular History). Right-click to **Delete** an entry.

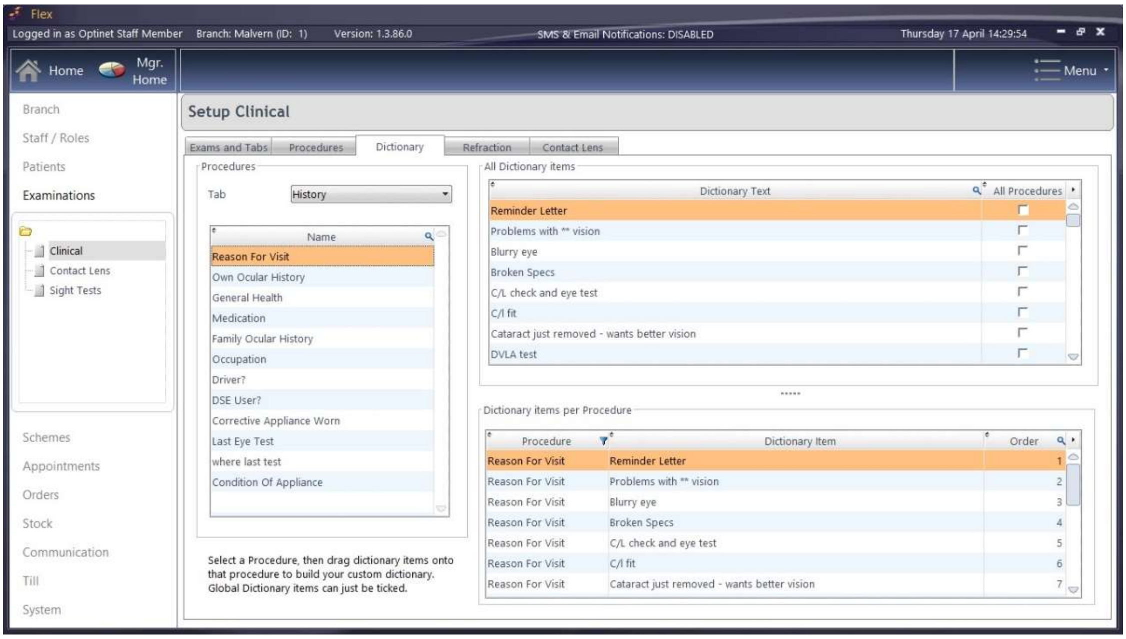


<u>Dictionary:</u>

Terms that appear in the Dictionary window can be personalised for each procedure, and bring together everything for the first three tabs we have looked at (Exams & Tabs; Procedures; Dictionary)

Choose the **Tab** from the drop-down (set to **History** below) and the **Name** of the procedure (set to **Reason for Visit** below).

"Answers" (Dictionary Items) are shown in the **Dictionary Items per Procedure** and their orders are set on the bottom screen. Further results can be dragged down from the **All Dictionary Items** table. To add a new item, double click in the first free line of **All Dictionary Items** and enter the text. Right-click to **Delete** an entry.



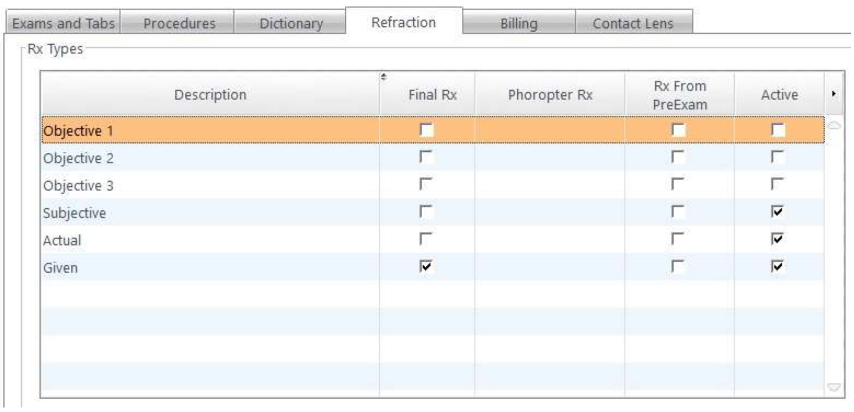
Refraction:
You can have a maximum of 6 Rx types in the Clinical Refraction. One of these is selected as the **Final Rx,** which non-clinical members of staff (e.g. the DO) can see and use for the Dispense (although the DO can update this if needed).

Enter the **Phoropter Rx** name to enable a link with your Test Chart Phoropter Module. Please contact us for more help with Phoropter head integration.

An **Rx From PreExam** (see How Do I Create a Pre-Exam?) can be used as one of your (up to) 6 - check the box and rename accordingly if you wish to use this feature.

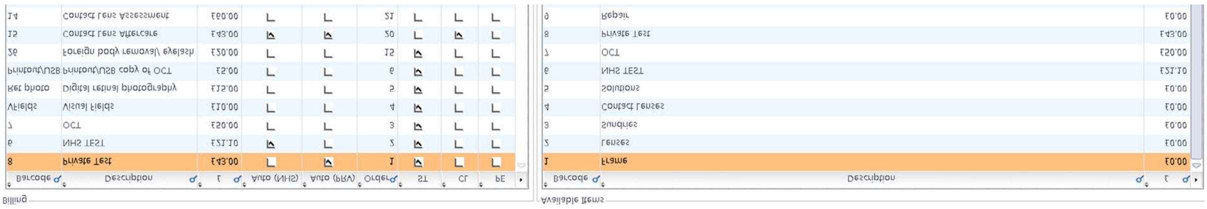
An **Rx From Last Test** can also be used as one of your (up to) 6 - check the box "Last Test" and rename accordingly if you wish to use this feature. Note the Rx pulled through is always the previous "Given" prescription.

Check the box to make an Rx type **Active**, and make sure you know which you have chosen as the **Final Rx**. These **Description**s can also be updated.



Billing:

The Clinical Billing section allows Optometrists to start a receipt for a patient in the testing room. In this setup tab, items from the sundry product group will appear in **Available Items**, and these can be dragged across to the **Billing** tab to make them available in the examinations. This is shown below:

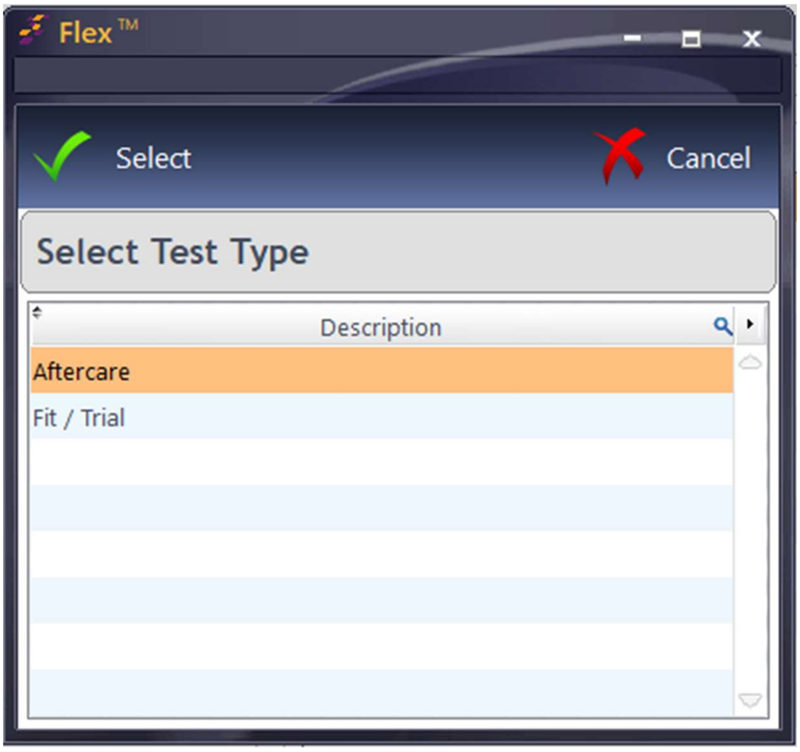


When an item is dragged across, the **Barcode**, **Description** and Price - **£** will populate. You can tick the "**Auto**" options to add these items to your Sight Text bill for Private and/or NHS patients automatically.

In a similar fashion to the Exams and Tabs on the first screen, choose if these items are available to bill on the Sight Test (**ST)**, Contact Lens Exam **(CL)**, Pre Exam **(PE)** or a mix.

Section 3: Contact Lens Records

To create a new Contact Lens Record, click the '**New**' button on the Patient Record, and then click '**New Contact Lens Record**'. This will open a window containing the new contact lens record.



You will initially be shown two types of test.

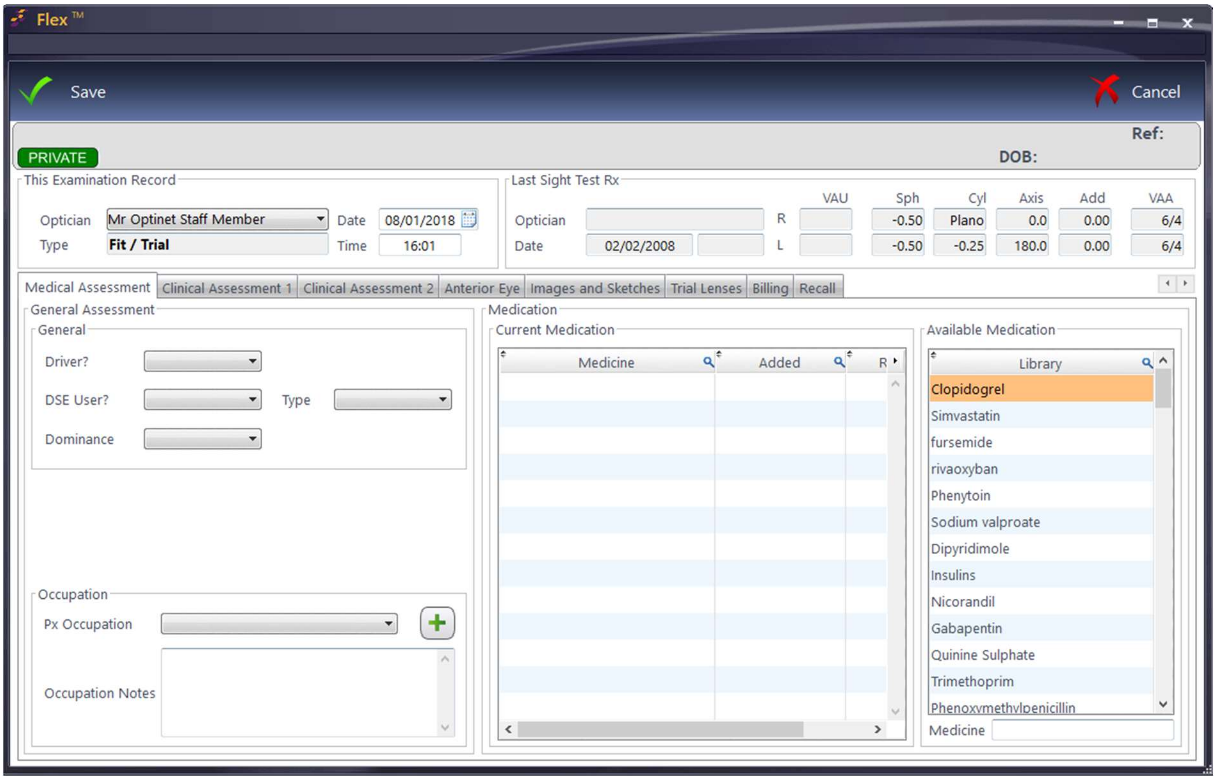
Medical Assessment

The medical assessment screen is similar to what can be seen in the [Sight Examination Record](). On opening the new contact lens record, the date, time and type of the test are filled out automatically. The **Optician** can be selected from the drop-down list.

Firstly, a **General Assessment** can be carried out using the dropdown menus to note whether the patient drives, uses screens regularly and also their dominant eye. The patient's **Occupation** can also be entered using the dropdown, or if it is not in the list, it can be added using the green plus button.

Next, the patient's **Medication** can be added by dragging items from the available medicines list into the Current Medication box. Right-click to remove a medication.

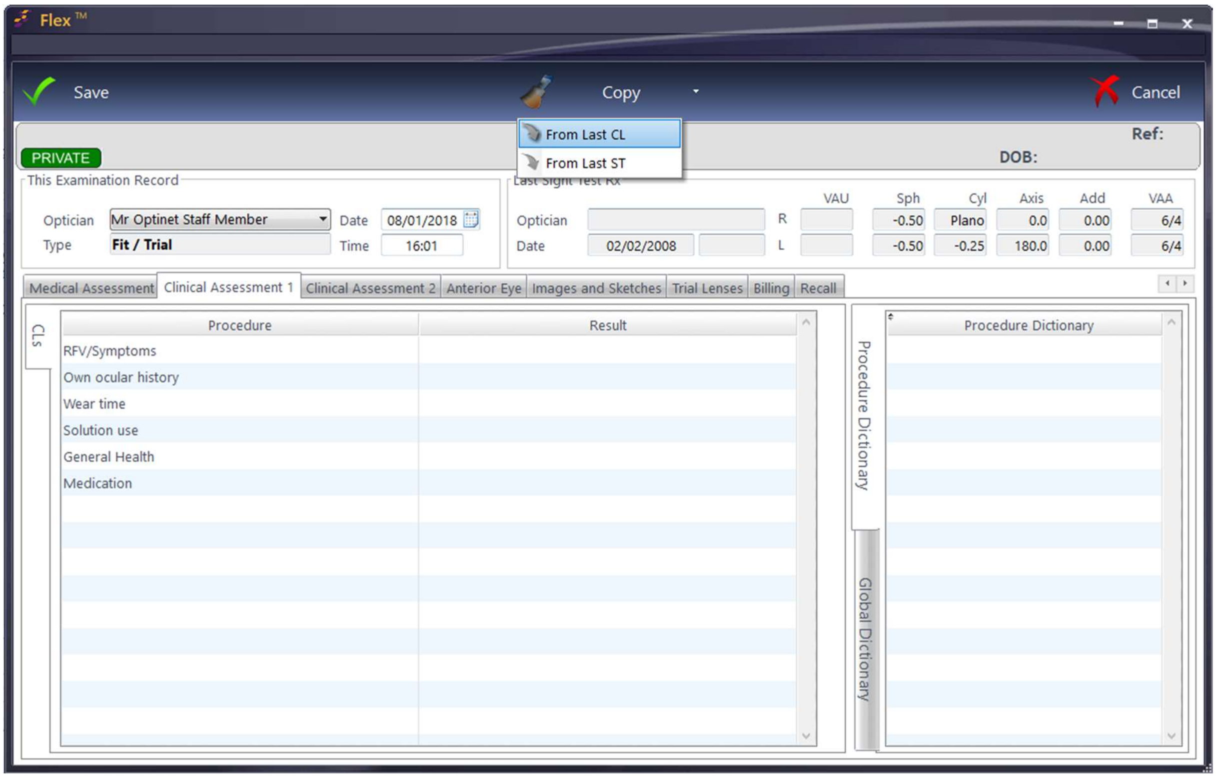
Whenever a new sight test, contact lens or pre-exam record is created the most recent details are automatically loaded in, regardless of which type of test was done previously. For example, if you have a previous pre-exam record and open a new contract lens record, it will load the details from the previous pre-exam record or vice versa. This means that whenever you open a new record, the details will always be up-to-date and can be amended as necessary.



Clinical Assessment

A **Clinical Assessment** can be performed in this tab. **Procedures** and **Results** (customisable in the clinical setup) can be dragged from the dictionary or double clicked to move them to the result column. You can also double click in the results box to enter your own. You are also able to perform more than one clinical assessment if you wish, which can again be customised in the setup.

Previous results can also be copied from the patient's last contact lens record or sight test record



Anterior Eye

On the Anterior Eye tab, **Keratometry** Readings and **Diameters** can be entered.

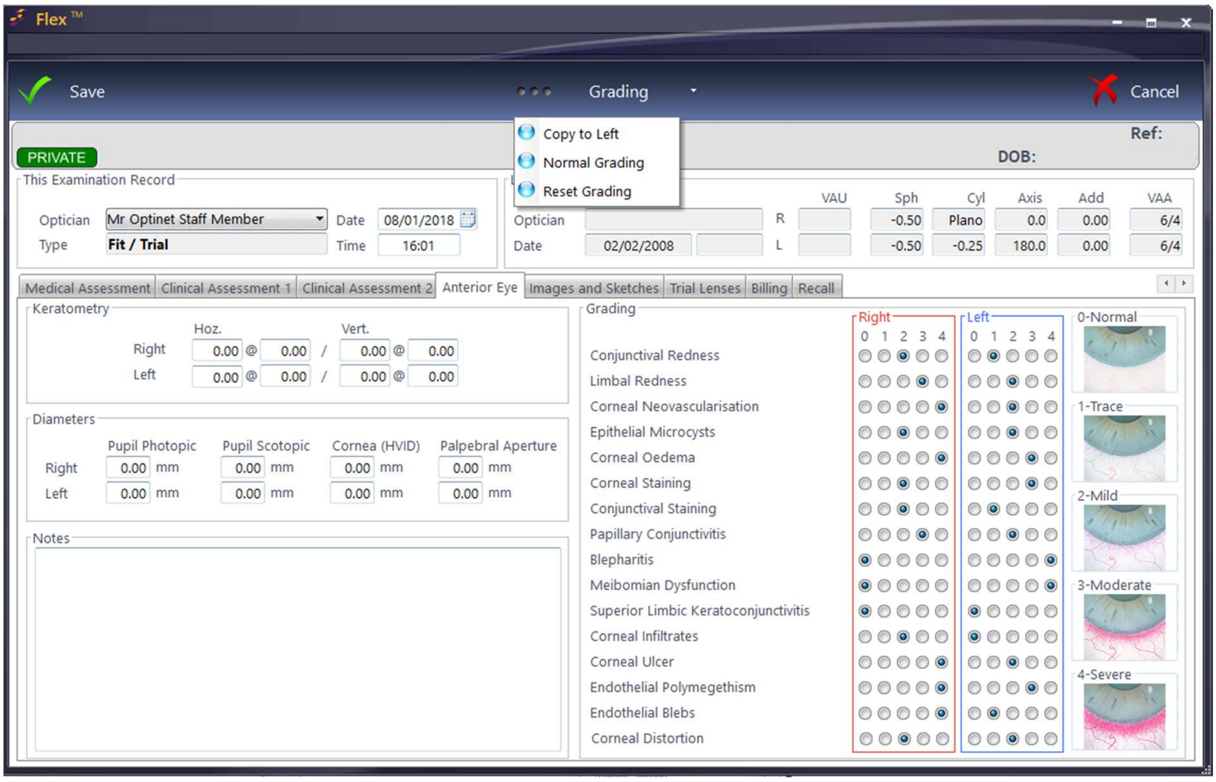
The Efron **Grading** Scale is also found on this page. Hovering over the number on the scale (0 for normal to 4 for severe) gives a view of the level of each condition. Single-click on a "score" to assign it, or double-click to bring up a larger image of the condition and its severity.

The **--- Grading** button is a useful tool with three functions:

Copy to Left will copy the results entered for the right eye to the left eye.
Normal Grading sets all results to 0.
Reset Grading removes all scores.

Double-click on a "Score" to see a larger image of the condition.

Any notes about these results can also be entered in the notes box.

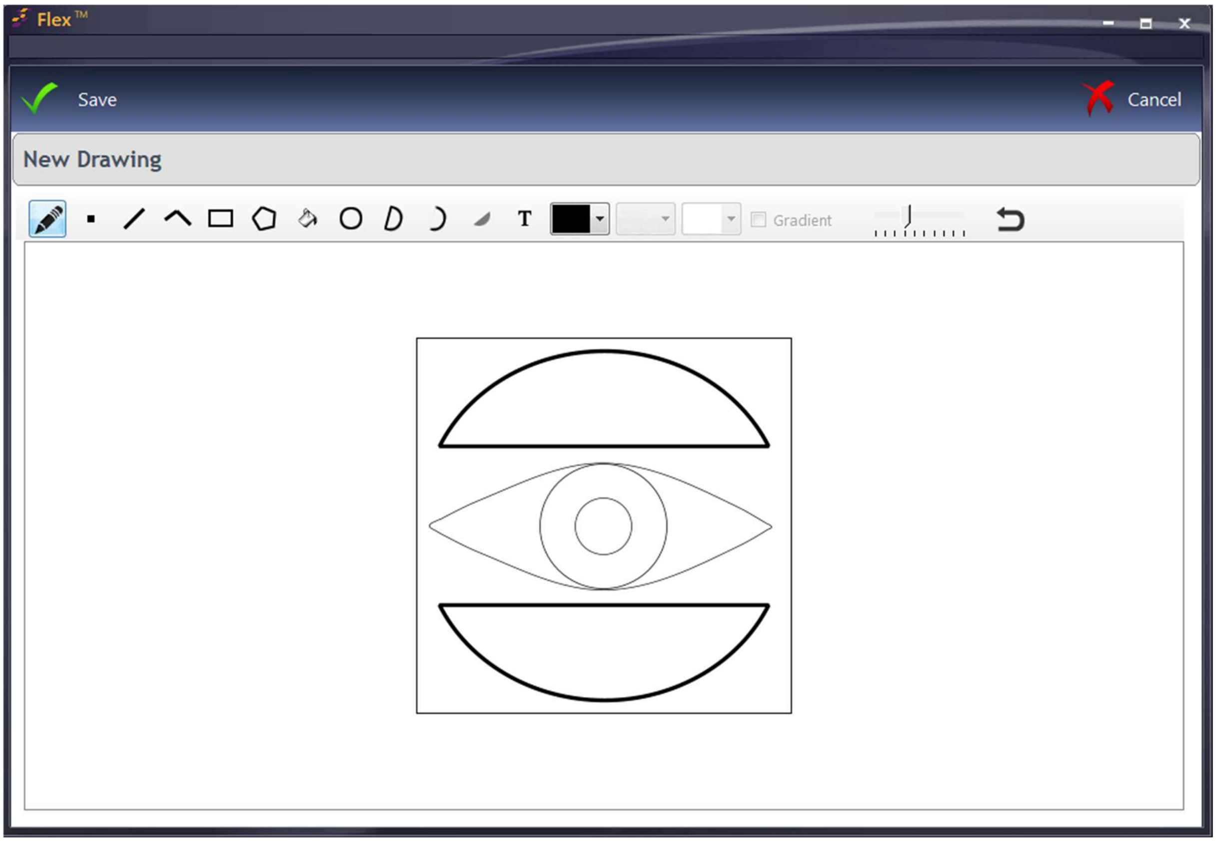


Images & Sketches

The Images and Sketches tab can be used to add any imagery required. The 'Add Images and Sketches' button can be used to import files from your computer into Flex or to load a sketch from the existing Flex library.

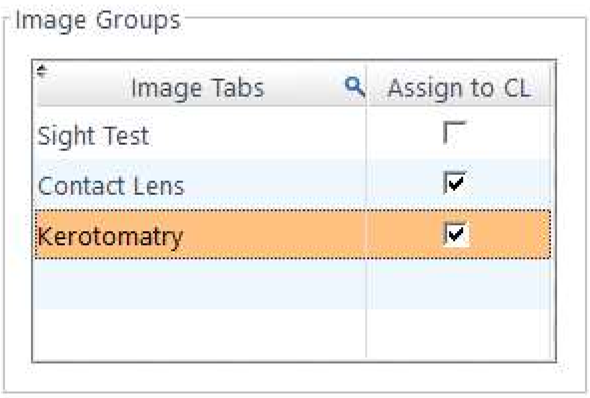
Here you can:

- Double click on the sketch templates at the top of the window to add them to the record.
- Double click existing images to edit them.
- Edit the notes for any existing images.
- Delete images.
- Load new images from your computer's hard drive.
- Scan new images in.



Flex Imaging

If you are using Flex Imaging, you are now able to set image groups to "Contact Lens" groups. This is done in Setup / System / PC / Image Manager.



When saving an image in Flex Imaging using a contact lens group, the image is saved to Patient Images and then linked to the patient's most recent contact lens examination with the "Sketches & Images" tab visible.

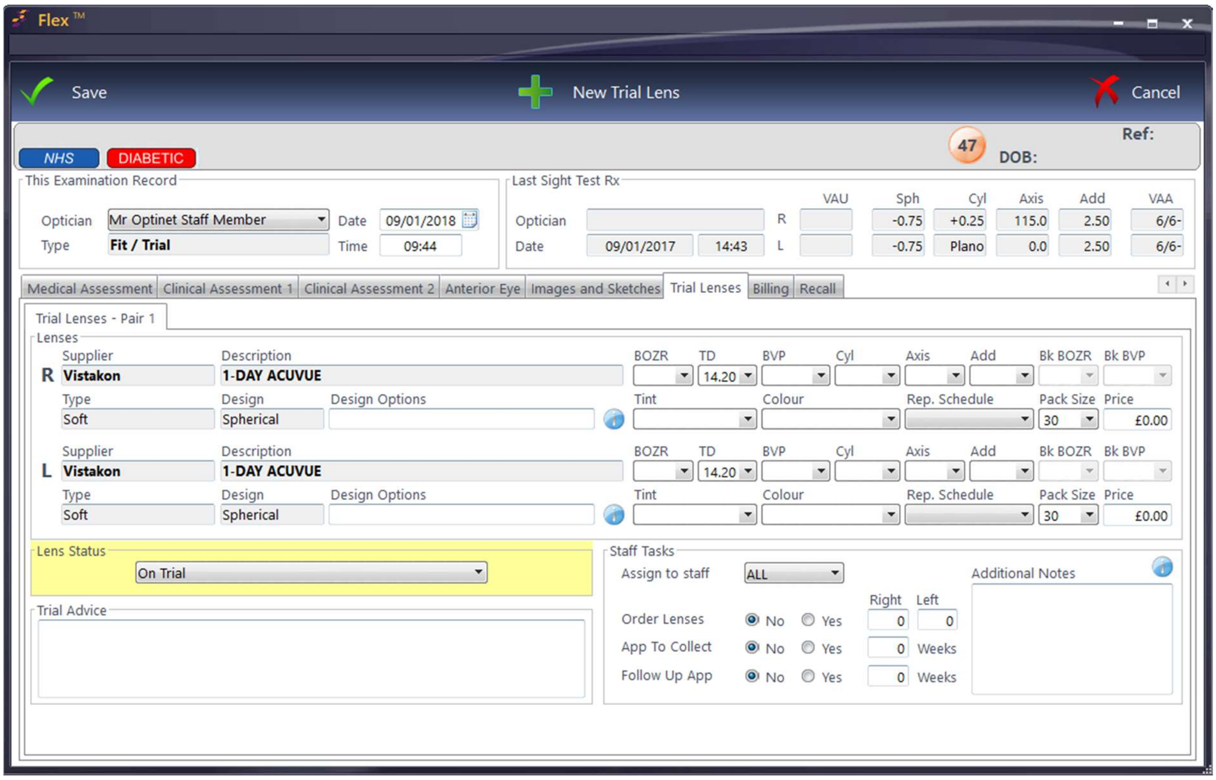
If you have a contact lens record open when you save the image, you can use the "Refresh" button at the top of the screen to update the list of images. This will then load the images you saved in Flex imaging into the contact lens record.

Trial Lenses

Trial lenses can be added by clicking the '**New Trial Lens**' button at the top of the window. This will bring up the **lens wizard** once again, where you can select the appropriate lenses for the patient.

Once lenses have been selected, they will appear in their own tab, similar to the dispense screen. You can add more than one pair of trial lenses here. You may have to manually select the **BOZR** if multiple base curves are available for that lens. You can then choose the **BVP**, where only powers available for that lens are shown. For Toric lenses you can add in the **Cyl / Axis** and **Add**.

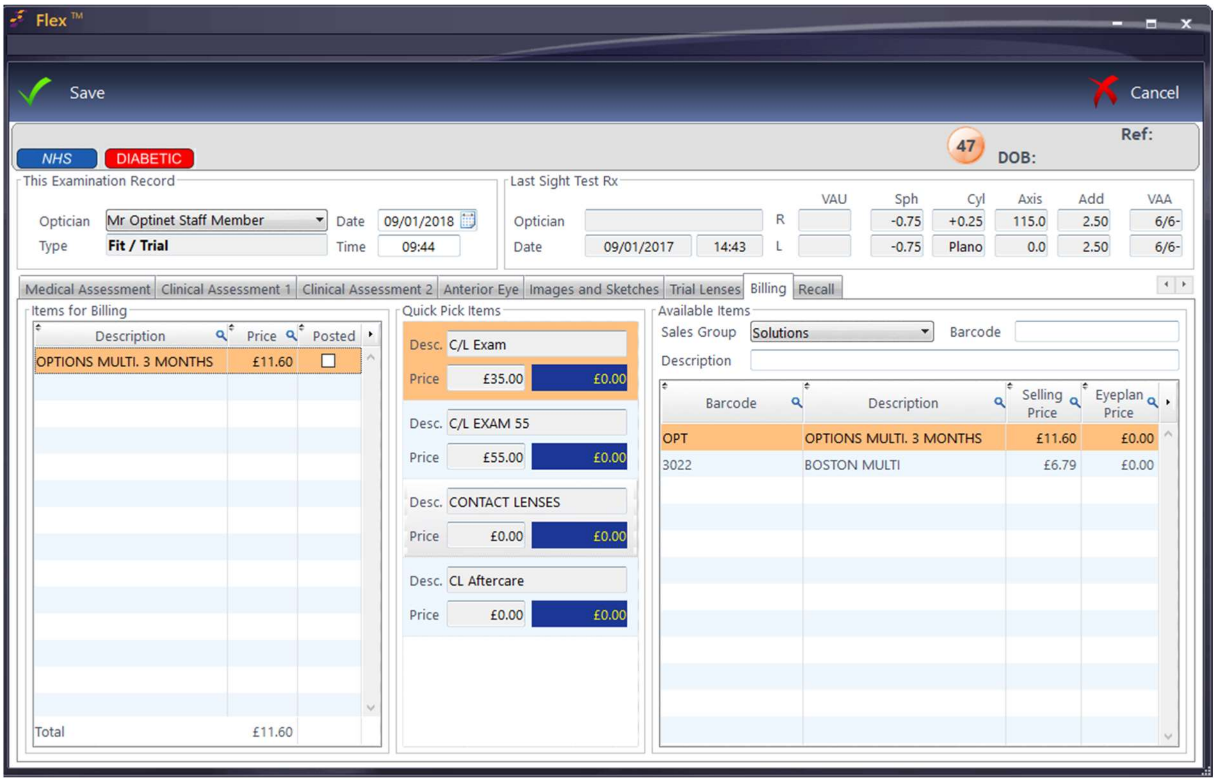
Within this tab, you can also change the **status** of the lenses if needed, add any **advice** given to the patient about the trial lenses and also set up **staff tasks** to be created.



Billing

Items can be posted straight to the till from the **Billing** tab, in the same way as on a sight test record. The items available to be selected, as well as the quick pick items can all be changed in the contact lens examination setup. Here you can also search by sales group, barcode and description.

To add an item for billing, double click it in either the **Quick Pick Items** or **Available Items** boxes.



Lastly, we can move on to the Recall tab, which looks the same as the Aftercare version, except without the Lens Status dropdown, as this has already been selected in the Trial Lens tab.

Recall

In the Recall tab, we can schedule various recalls and tasks, as well as assign the new lenses a status and make more notes if required:

Aftercare Recall - You can select a recall schedule to use and the due date for the patient to return will automatically be filled. You can manually change the amount of time using the '**Due In**' box and dropdown.

Additional Recall - You can assign an additional recall schedule to a patient by ticking 'override'.

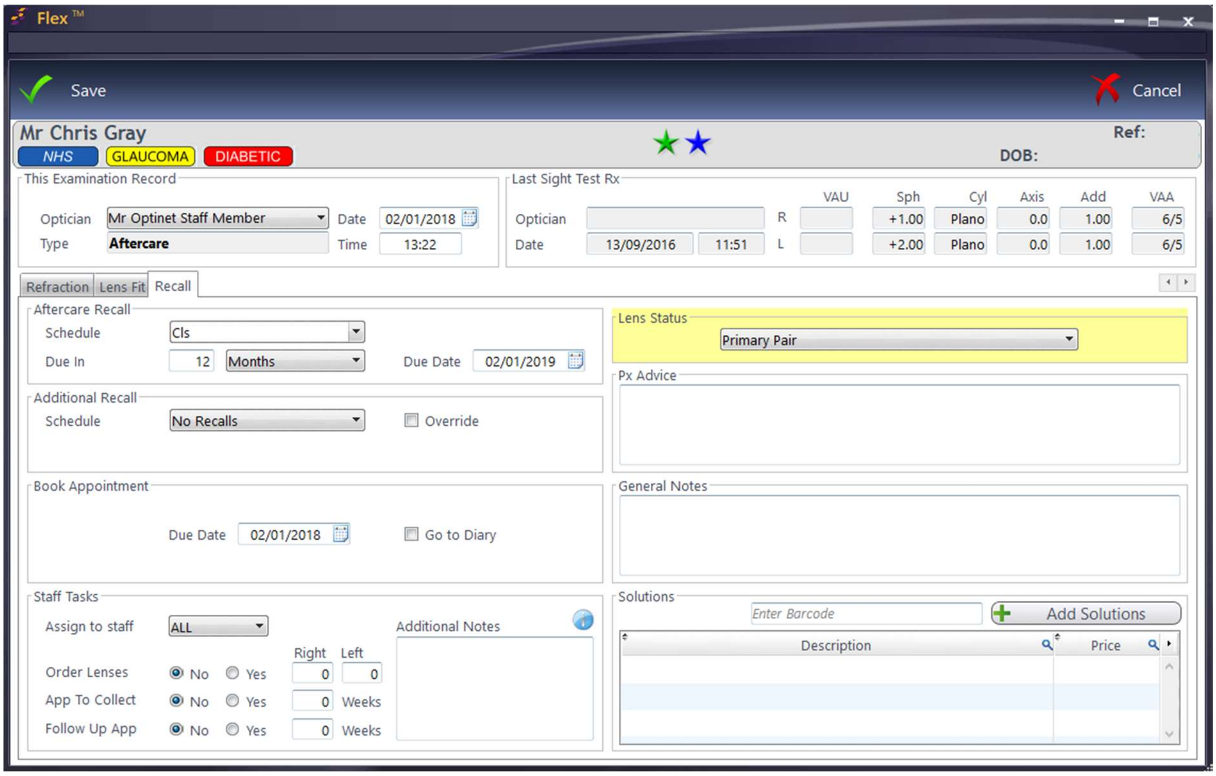
Book Appointment - Using the **go to diary** tickbox, you can book a patient straight in for the next appointment once the contact lens record has been saved.

Staff Tasks - A task can be created from the contact lens record, allowing you to request that lenses be ordered and appointments to be booked as well as any other notes. Ticking any of the Yes boxes will generate an auto comment. Hovering over the question mark icon will give you a preview of what the note will look like. The staff tasks are created when the record is saved.

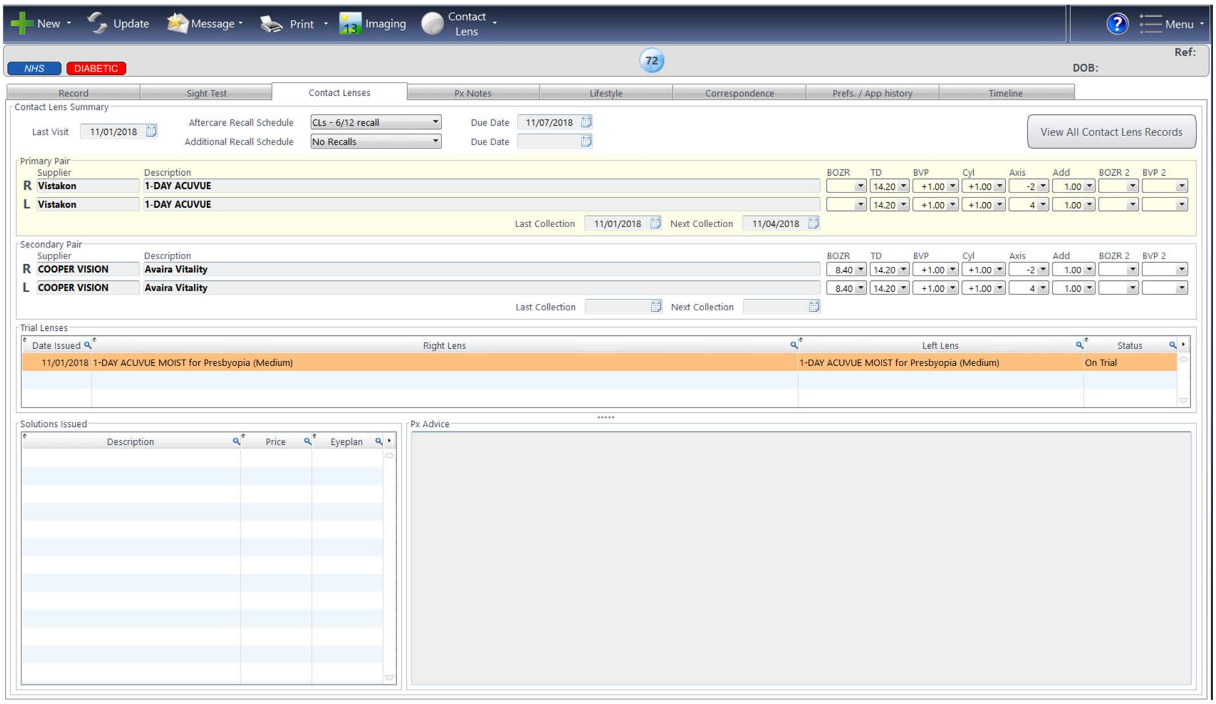
Lens Status - The status of the lens can be selected, be it Primary, Secondary, On Trial etc. This selection will reflect on the patient's main contact lens tab on their patient record.

Px Advice & General Notes - Any other advice or notes can be added here.

Solutions - Multiple solutions can be added to the record, either by entering a barcode or by clicking the 'Add Solutions' button



Contact Lens Home Screen

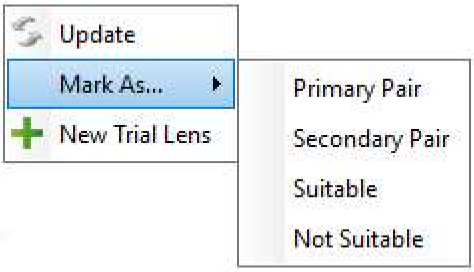


The contact lens home screen has been designed to show you the patient's relevant contact lens information all in one place, reducing the need to scroll back through previous records. Here you can see :

- The date of the patient's last contact lens exam and their recall due dates.
- The primary and secondary pairs of lenses the patient is currently wearing.
- Collection dates for the primary and secondary pairs.
- Any solutions being used by the patient.

- Any advice given to the patient by the practitioner.
- The patient's trial lens history and each pair's status.

You can right click on the table of trial lenses to update any of the trial lens records, quickly change their status, or add new trial lens records. Hovering the cursor over a trial lens in the table will display the Rx and general notes attached to the trial lens record in a tooltip.



If you need to view the complete contact lens record history, you can click the "View All Contact Lens Records" button at the top right of the home screen. Clicking on the "Contact Lenses" tab will then return you back to the contact lens home screen.

Collections

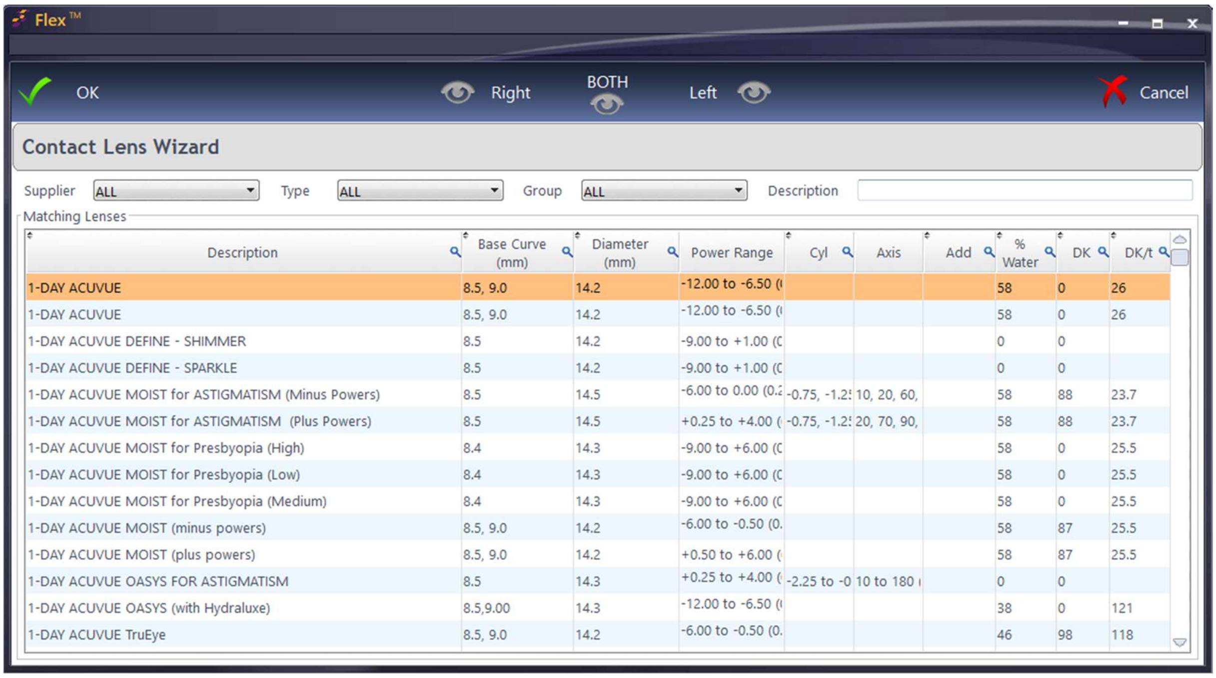
The **contact lens collection window** offers an easy way to update the collection dates. It is accessed from the contact lens drop down menu at the top of the **patient record**.

There are now separate collection dates for the **primary** and **secondary** pairs. Clicking collected will automatically skip the collection date ahead the same period as last time, or it can be adjusted manually.
Collection dates can also be updated when collecting a contact lens order. If the order is for the patient's primary or secondary pair of lenses, the contact lens collection dates will appear when marking the order as collected and can be adjusted as necessary.

Refraction

Refraction is where you can add lenses to the contact lens record as well as details about the patient's prescription. The following screenshots show the different sections of this page.

To add new lenses, click '**New Lens**' at the top of the window. This will bring up the **Lens Wizard**. In the contact lens **catalogues** it is now possible to enter prices based on pack size. This is done in **Setup / Examinations / Contact Lens / Lenses.** In the lens wizard, hovering the mouse over a lens will display a tooltip showing the prices for each pack size, and changing the pack size on the contact lens record will automatically update the price.



Choose the **Supplier, Lens Type** and **Lens Group**. Lenses available will be shown under **Matching Lenses**. Double-click on a lens to select it for both eyes (or press **BOTH**) shown at the top of the screen. The lenses will then be shown in yellow rectangles for each eye. Alternatively, press **Right / Left** to select for just one eye, and then find the other lens (if relevant) and repeat the process. Press **OK** and the Lens Wizard will close; we will then be back to our previous screen with the lenses now populated.

You may have to manually select the **BOZR** if multiple base curves are available for that lens. You can then choose the **BVP**, where only powers available for that lens are shown. For Toric lenses you can add in the **Cyl / Axis** and **Add**.

Bottom Half:

Visual Acuity: Pre can be entered. This is open to interpretation, but we would suggest this is Unaided. Near Vision can be entered in Pre (N)
Over-refraction can be entered for reference. To include in the Rx, tick the Apply button, which will update the Wearing / Order Rx.
Visual Acuitiy: Post can be entered, along with Toric Alignment for Toric Lenses, which again is open to interpretation by the CLO.


Flex ™
Save
New Lens
Cancel
Mr Chris Gray
NHS
GLAUCOMA
DIABETIC
Ref:
DOB:
This Examination Record
Optician
Mr Optinet Staff Member
Date
02/01/2018
Type
Aftercare
Time
13:12
Last Sight Test Rx
Optician
Date
13/09/2016
11:51
VAU
Sph
Cyl
Axis
Add
VAA
R
+1.00
Plano
0.0
1.00
6/5
L
+2.00
Plano
0.0
1.00
6/5
Refraction
Lens Fit
Recall
Lenses
Supplier
Description
BOZR
TD
BVP
Cyl
Axis
Add
Bk BOZR
Bk BVP
R
J&J
1-DAY ACUVUE
8.40
14.20
-5.25
Type
Design
Design Options
Tint
Colour
Rep. Schedule
Pack Size
Price
Soft
Spherical
Daily
900
£0.00
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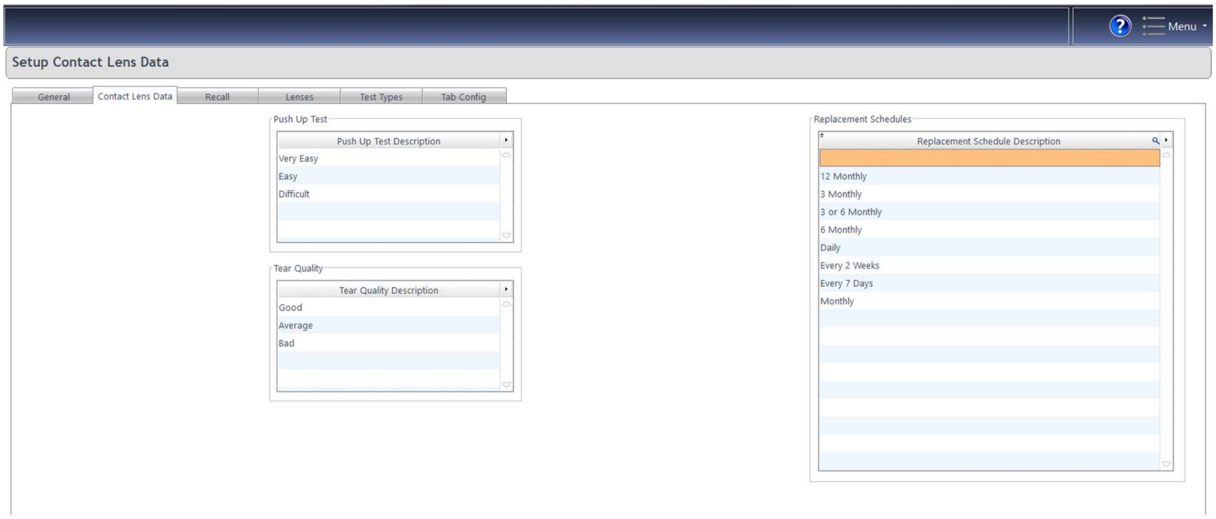
1-DAY ACUVUE
8.40
14.20
-3.00
Soft
Spherical
Daily
900
£0.00
Visual Acuity: Pre
Bino 6 /
Right 6 / 0
Left 6 / 0
Visual Acuity: Pre (N)
Bino N
Right N
Left N
Over-Refraction
Sph
Cyl
Axis
Add
BVD
Right Plano 0.00 0.0 0.00 0
Left Plano 0.00 0.0 0.00
Corrected Rx
Sph
Cyl
Axis
Add
Right -5.25 0.00 0.0 0.00 Apply
Left -3.00 0.00 0.0 0.00 Apply
Visual Acuity: Post
Bino 6 /
Right 6 / 0
Left 6 / 0
Visual Acuity: Post (N)
Bino N
Right N
Left N
Toric Alignment
Right
0°
Left
0°
Final Rx
Sph
Cyl
Axis
Add
Right -5.25 Override
Left -3.00 Override

Section 4: Contact Lens Clinical Customisations

There are a handful of areas which are customisable for the Contact Lens section of FLEX. To access the customisations, click to Menu – Setup – Examinations – Clinical. You will then see the Contact Lens tab.

Contact Lens Data

This is where **Push Up Test Descriptions** (e.g. Very Easy, Easy, Difficult), **Tear Quality Descriptions** (e.g. Good, Average, Bad) and **Replacement Schedules** (e.g. Monthly, Quarterly, Annually) can be entered. You should not need to change these as they are set by Optinet. However, new descriptions can be added if you wish, by clicking in the row below the last entry and typing in your new description.



Customise Tabs

The tabs within the Contact Lens Record are all editable. You can find the **Tab Config** tab by heading to Menu >> Setup >> Examinations >> Contact Lens.

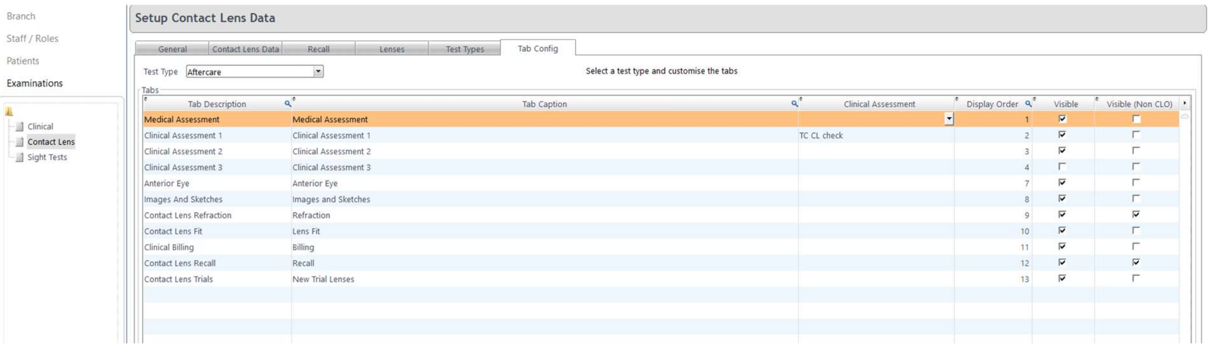
- The test type dropdown allows you to select the type of test you want to configure the tabs for. Once you have selected a test type, you can see all the tabs within that type.

- To change the name or caption of a tab, double click it to bring up the cursor. You can name your tabs anything you like, although we recommend keeping them as descriptive as possible for ease of use.

- In the **clinical assessment** column, you can choose an exam to use for your clinical assessment tabs, which can be set up in the main 'Clinical' setup.

- The **display order** of the tabs can be changed to suit your preference. The ascending numbers correspond to the tabs going left to right in the contact lens record, so #1 would be the first tab.

- You can quickly turn tabs on or off using the '**visible'** tick boxes and select what can be seen by clinical and non-clinical staff members.

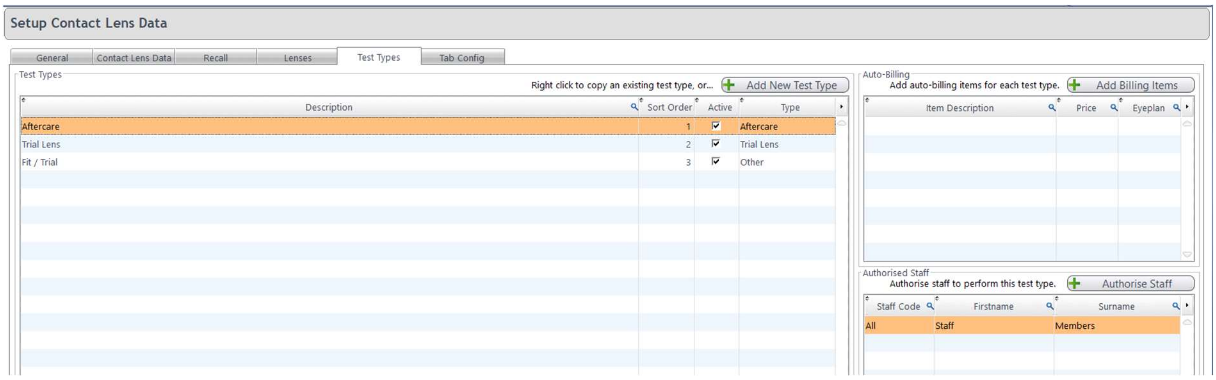


Test Types

This is where **Test Types** can be set up. When a new contact lens record is created, Clinical users can choose from multiple test types. A new test type can be added by clicking in the row below the last entry in the test types box.

Auto-billing items can be added to each test type using the '**Add Billing Items**' button. This will automatically add items from stock on to each new contact lens record of the relevant type.

Specific staff can be authorised to perform certain tests. Staff members can be added using the '**Authorise Staff'** button.



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