



Get the most out of



# User Guide to Clinical Records

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## 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

Save External Link Cancel

Miss Sam Heath NHS Ref: 15951 DOB: 01/01/2000 (21 yrs)

This Pre-Exam Record

Date / Time 14/12/2021 16:29

Staff Optinet Staff Member

General Assessment Questionnaire Current Rx IOP'S Clinical Billing

General Assessment

General

Driver? Yes without Rx

DSE User? Yes without Rx Type

Dominance

Occupation

Px Occupation +

Occupation Notes

Medication

Current Medication

Medicine	Added	Removed

Available Medication

Library

- Sodium valproate
- Clopidogrel
- Simvastatin
- Phenytoin
- Dipyridimole
- Insulins
- Nicorandil
- Gabapentin
- Quinine Sulphate
- Trimethoprim
- Phenoxymethylpenicillin
- Benzylpenicillin
- Metronidazole

Medicine

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

Flex™

Save External Link Cancel

Miss Sam Heath NHS Ref: 15951 DOB: 01/01/2000 (21 yrs)

This Pre-Exam Record

Date / Time 14/12/2021 16:29

Staff Optinet Staff Member

General Assessment Questionnaire Current Rx IOP'S Clinical Billing

IOP Readings

Tonometer Eye Drops

Right IOP

1st IOP 1st Time

2nd IOP 2nd Time

3rd IOP 3rd Time

4th IOP 4th Time

Ø mmHg

Ø kPa

Left IOP

1st IOP 1st Time

2nd IOP 2nd Time

3rd IOP 3rd Time

4th IOP 4th Time

Ø mmHg

Ø kPa

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 show 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.

The screenshot displays the NHS patient record system interface. At the top, there's a navigation bar with tabs: Record, PreExam, Sight Exam, Contact Lenses, Px Notes, Correspondence, and Consent / App. Hist. The main content area is split into two main sections: General Assessment and Medication.

**General Assessment:**

- Driver?** Yes without Rx (dropdown)
- DSE User?** Yes without Rx (dropdown) | **Type** (dropdown)
- Dominance** (dropdown)
- Referred By:**
  - ☐ GP ☐ Self ☐ Optometrist
  - ☐ Hospital ☐ Recall ☐ Other
- Occupation:**
  - Px Occupation:** (dropdown) + (green plus icon)
  - Occupation Notes:** (text area)

**Medication:**

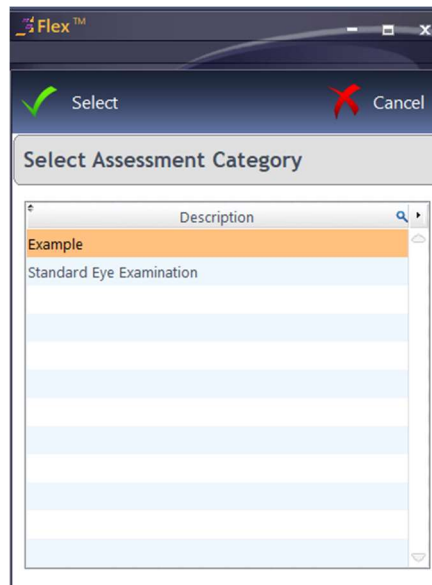
**Current Medication**

Medicine	Added	Removed

## 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)

Date	Time	Staff	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
14/12/2021	16:43	Mr Optinet Staff Member	R:	+1.00	+0.25	12.00	0.00		0.00
			L:	+1.00	+0.25	12.00	0.00		0.00

Procedure	Result
Last Eye Test	
Where last test	
Reason For Visit	
Own Ocular History	
General Health	
Hobbies / Sports	
Family Ocular History	
Corrective Appliance Worn	
Condition Of Appliance	

Going out
Holidays only
Playing sports / hobbies



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**.

The screenshot displays the FLEX Clinical Refraction software interface for a patient named Miss Sam Heath. The top bar includes a 'Save' button, a 'Copy' button, a 'Transpose' button, an 'External Link' button, a 'Reset Tab' button, and a 'Cancel' button. The patient's name 'Miss Sam Heath' is displayed, along with a reference number 'Ref: 15951' and a date of birth 'DOB: 01/01/2000 (21 yrs)'. The interface is divided into several sections: 'This Examination Record' showing the date and time of the exam, the optometrist's name, and the type of exam; 'Previous Examination Results' showing a table of past exams with columns for Date, Time, and various refraction parameters; and a main 'Clinical Refraction' section with tabs for 'Distance', 'Addition', 'Intermediate', and 'Near' vision for both 'Right' and 'Left' eyes. The 'Right Distance (Last Test)' tab is currently selected, showing values for Sph (+1.00), Cyl (+0.25), Axis (12.0), and Prism (0.00). A red vertical bar highlights the 'Last Test' tab on the left navigation pane.

## 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.

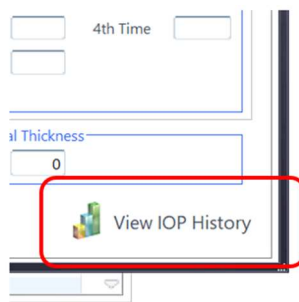
You can then specify, if relevant, any **Eye Drops** used, their **Expiry**, **Dosage** and **Batch**. **Corneal Thicknesses** can also be entered on this screen.

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.

	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
Date 14/12/2021 16:43 R		+1.00	+0.25	12.00	0.00		0.00
Staff Mr Optinet Staff Member L		+1.00	+0.25	12.00	0.00		0.00

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.

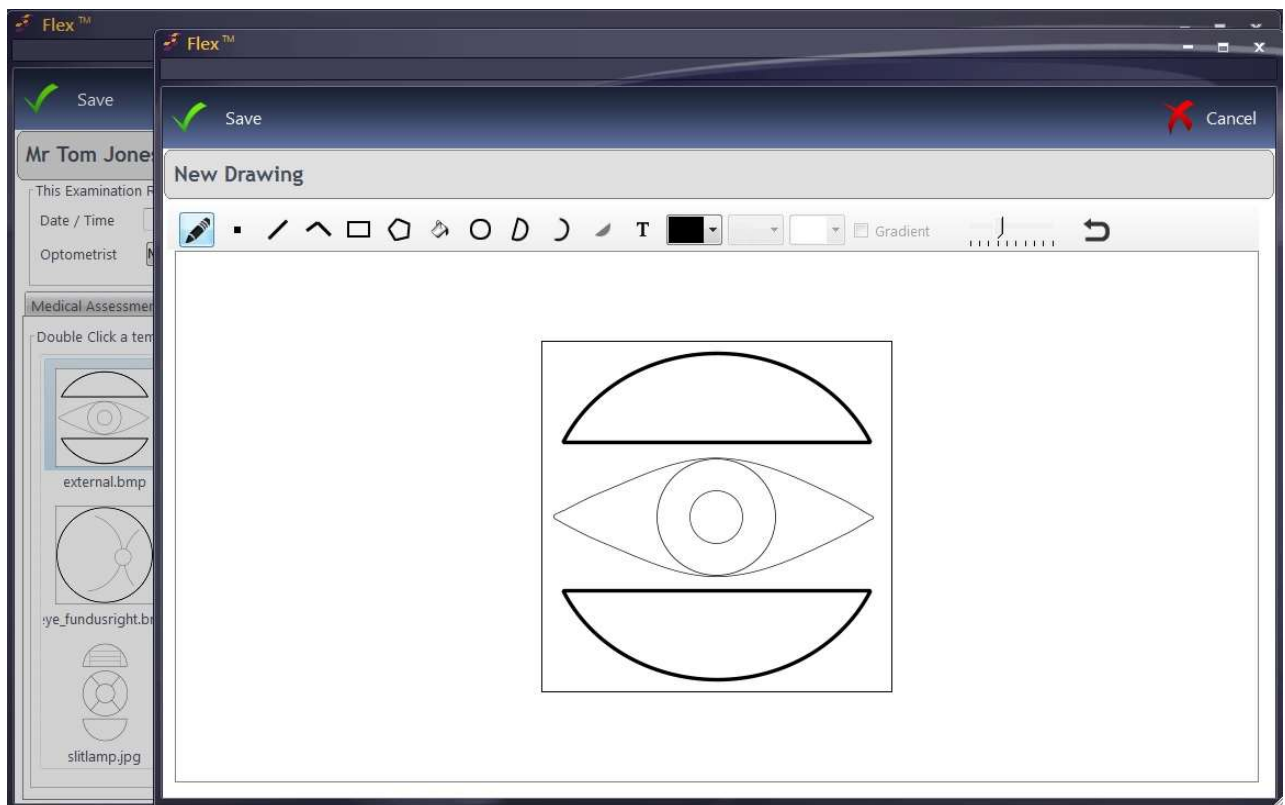
Select a template by double clicking on it:

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

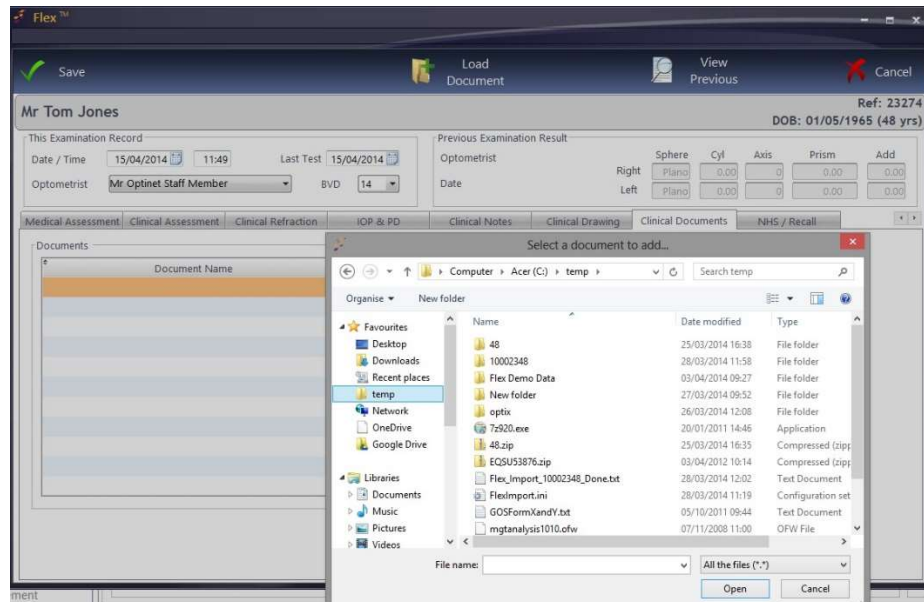
Arrow: Undo feature



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

## Clinical Documents

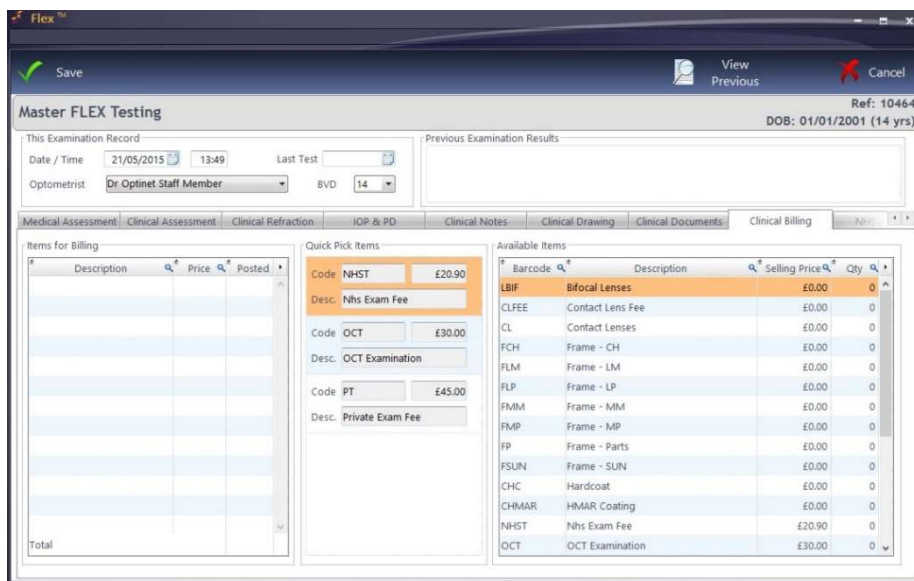
Optoms can attach any Clinical Documents required to the assessment. Click **Load Document** and browse to the relevant file in Windows. Press **Open** in the box and it will be added to the assessment.



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.



add an item into the **Items for Billing** window.

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

## **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**

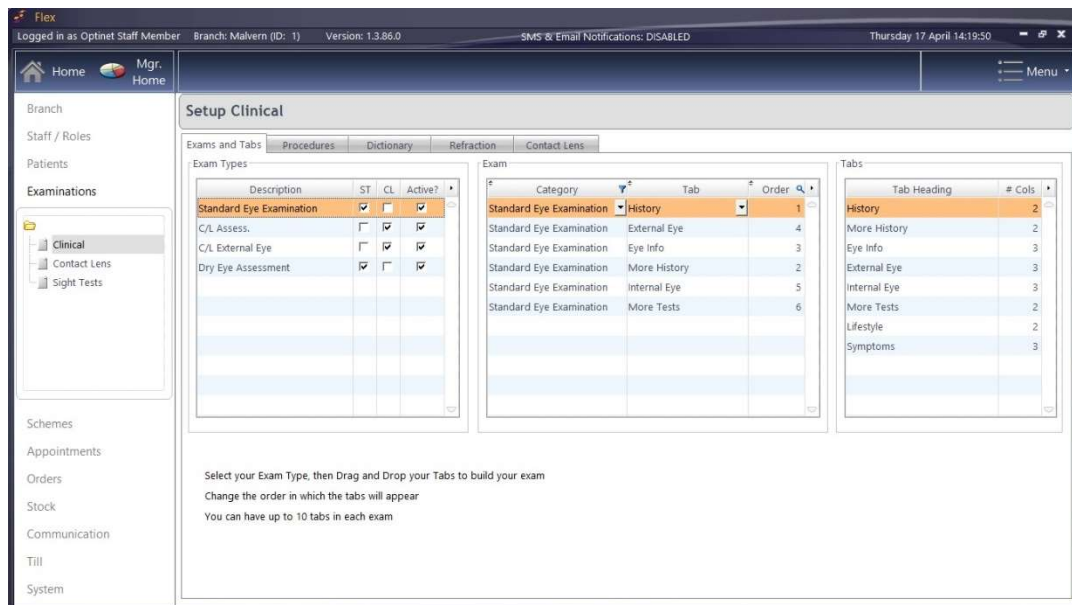
Click to Menu – Setup – Examinations - Clinical

### **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 if 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.

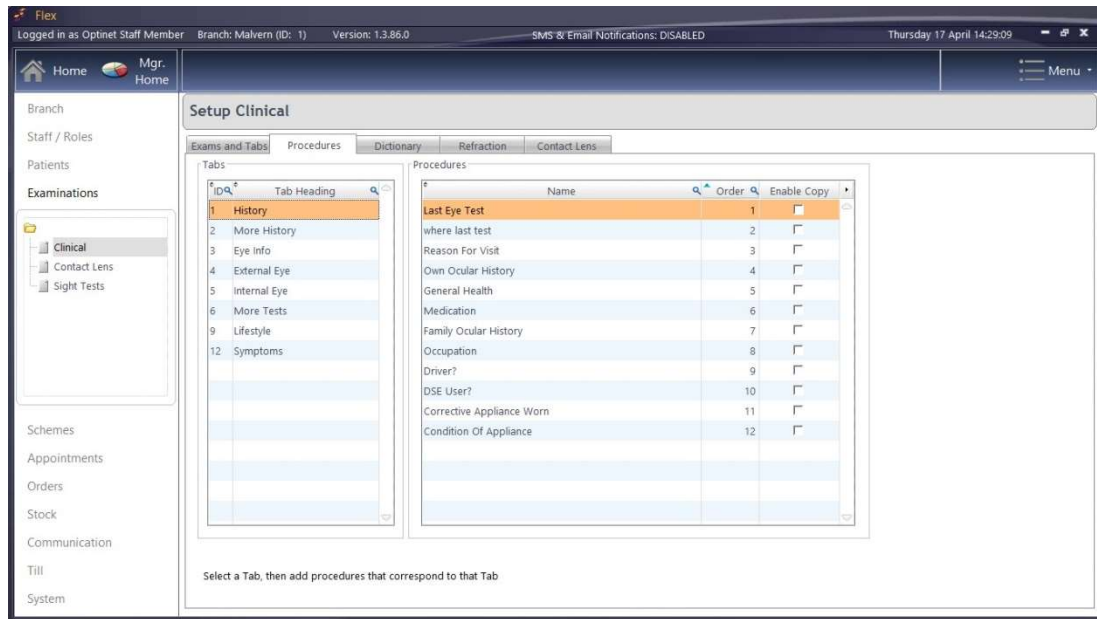


### **Procedures:**

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.



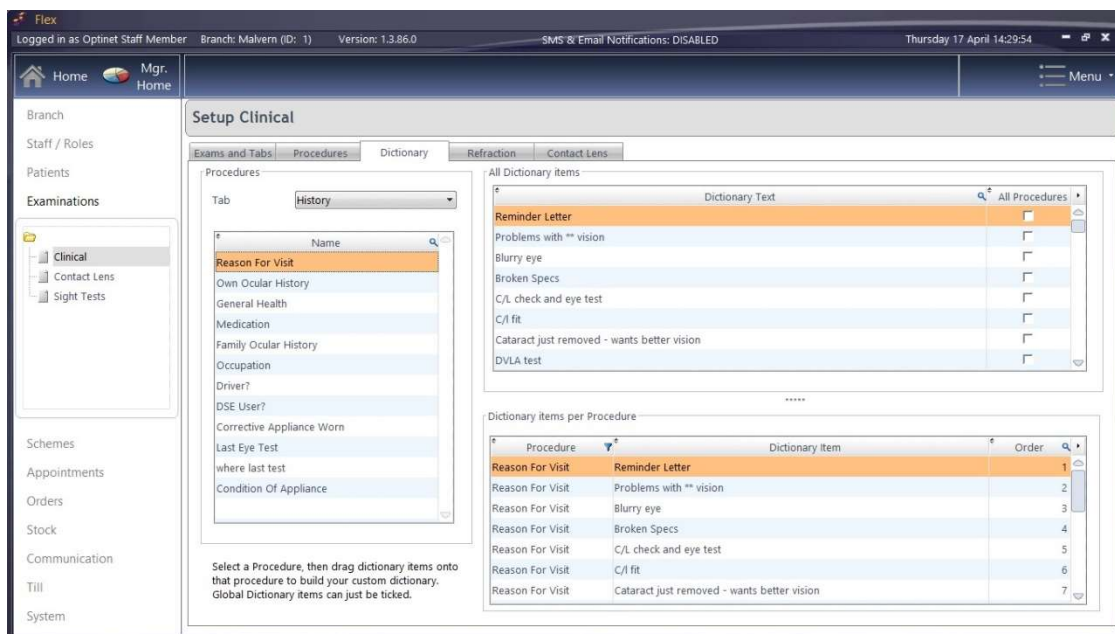
### Dictionary:

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 **Descriptions** can also be updated.

Exams and Tabs	Procedures	Dictionary	Refraction	Billing	Contact Lens
Rx Types					
Description	Final Rx	Phoropter Rx	Rx From PreExam	Active	
Objective 1	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Objective 2	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Objective 3	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Subjective	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Actual	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Given	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

**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:

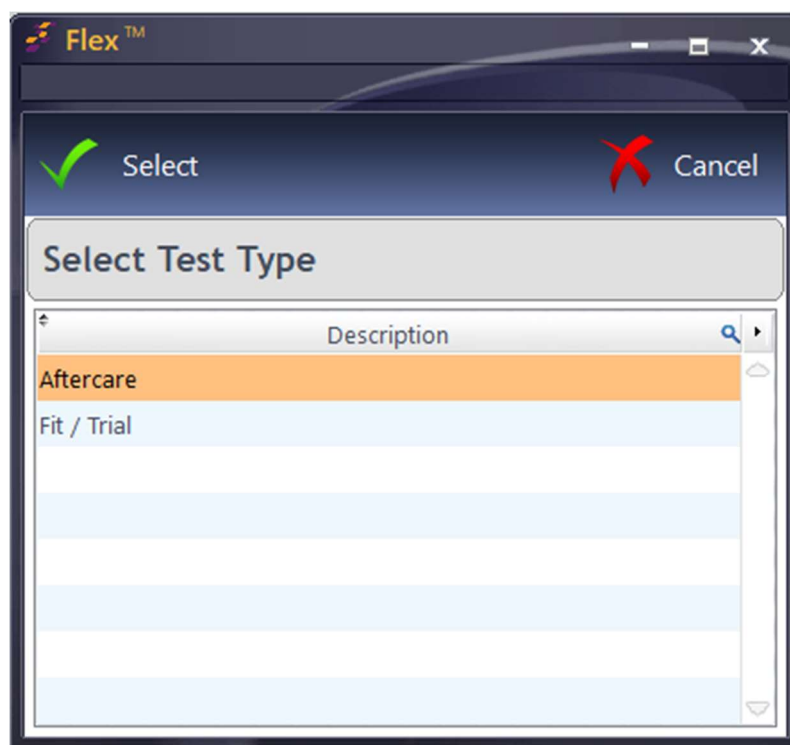
24	Contact Lens Assessment	£60.00	L	L	ST	L	L	L
25	Contact Lens Refraction	£45.00	L	L	ST	L	L	L
26	Contact Lens Removal Charge	£30.00	L	L	ST	L	L	L
27	Contact Lens Trial Charge	£25.00	L	L	ST	L	L	L
28	Contact Lens Trial Charge	£20.00	L	L	ST	L	L	L
29	Contact Lens Trial Charge	£15.00	L	L	ST	L	L	L
30	Contact Lens Trial Charge	£10.00	L	L	ST	L	L	L
31	Contact Lens Trial Charge	£5.00	L	L	ST	L	L	L
32	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
33	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
34	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
35	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
36	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
37	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
38	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
39	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
40	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
41	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
42	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
43	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
44	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
45	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
46	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
47	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
48	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
49	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L
50	Contact Lens Trial Charge	£0.00	L	L	ST	L	L	L

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 contact 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.

The screenshot displays the Flex™ software interface for patient management. At the top, there are 'Save' and 'Cancel' buttons. Below this, a 'PRIVATE' status indicator is visible. The main form is divided into several sections:

- This Examination Record:** Includes fields for 'Optician' (Mr Optinet Staff Member), 'Date' (08/01/2018), 'Type' (Fit / Trial), and 'Time' (16:01).
- Last Sight Test Rx:** A table showing previous prescriptions.
 

Optician	Date	VAU	Sph	Cyl	Axis	Add	VAA
		R	-0.50	Plano	0.0	0.00	6/4
	02/02/2008	L	-0.50	-0.25	180.0	0.00	6/4
- Medical Assessment:** Includes tabs for 'Clinical Assessment 1', 'Clinical Assessment 2', 'Anterior Eye', 'Images and Sketches', 'Trial Lenses', 'Billing', and 'Recall'. The 'General Assessment' section has dropdowns for 'Driver?', 'DSE User?', 'Dominance', and 'Occupation'.
- Medication:** A section with 'Current Medication' and 'Available Medication' lists. The 'Current Medication' list is empty. The 'Available Medication' list includes: Clopidogrel, Simvastatin, furseimide, rivaoxylan, Phenytoin, Sodium valproate, Dipyridimole, Insulins, Nicorandil, Gabapentin, Quinine Sulphate, Trimethoprim, and Phenoxymethyloenicillin.

## 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

Flex™

Save
 Copy
 Cancel

PRIVATE

This Examination Record

Opician

Mr Optinet Staff Member

Date

08/01/2018

Type

Fit / Trial

Time

16:01

From Last CL

From Last ST

DOB:

Ref:

Opician

Date

02/02/2008

VAU

Sph

-0.50

Cyl

Plano

Axis

0.0

Add

0.00

VAA

6/4

R

L

6/4

6/4

Medical Assessment

Clinical Assessment 1

Clinical Assessment 2

Anterior Eye

Images and Sketches

Trial Lenses

Billing

Recall

CLS

Procedure

Result

RFV/Symptoms

Own ocular history

Wear time

Solution use

General Health

Medication

Procedure Dictionary

Global Dictionary

Procedure Dictionary

Global Dictionary

## 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.

**Flex™**

Save Grading Cancel

**PRIVATE** **DOB:** **Ref:**

This Examination Record

Optician: Mr Optinet Staff Member Date: 08/01/2018 Time: 16:01 Type: Fit / Trial

Optician: R L Date: 02/02/2008

VAU Sph Cyl Axis Add VAA

R -0.50 Plano 0.0 0.00 6/4

L -0.50 -0.25 180.0 0.00 6/4

Medical Assessment Clinical Assessment 1 Clinical Assessment 2 Anterior Eye **Images and Sketches** Trial Lenses Billing Recall

Keratometry

Right Hoz. 0.00 @ 0.00 / Vert. 0.00 @ 0.00

Left 0.00 @ 0.00 / 0.00 @ 0.00

Diameters

Right Pupil Photopic 0.00 mm Pupil Scotopic 0.00 mm Cornea (HVID) 0.00 mm Palpebral Aperture 0.00 mm

Left 0.00 mm 0.00 mm 0.00 mm 0.00 mm

Notes

Grading

Conjunctival Redness

Limbal Redness

Corneal Neovascularisation

Epithelial Microcysts

Corneal Oedema

Corneal Staining

Conjunctival Staining

Papillary Conjunctivitis

Blepharitis

Meibomian Dysfunction

Superior Limbic Keratoconjunctivitis

Corneal Infiltrates

Corneal Ulcer

Endothelial Polymegethism

Endothelial Blebs

Corneal Distortion

Right Left

0 1 2 3 4 0 1 2 3 4

0-Normal

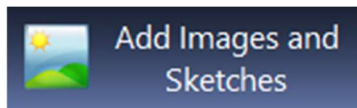
1-Trace

2-Mild

3-Moderate

4-Severe

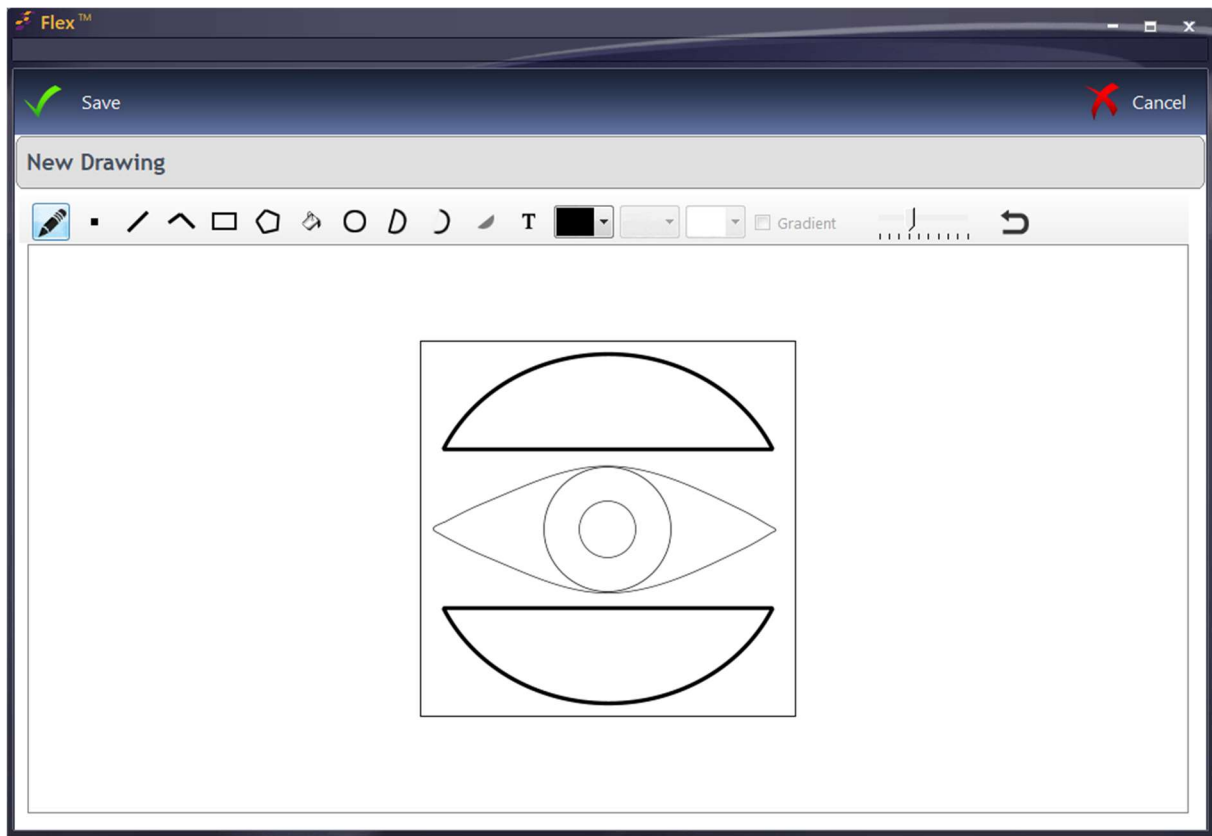
## Images & Sketches



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.

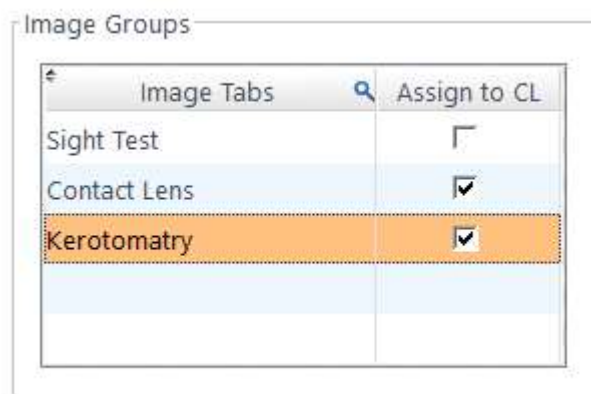
Here you can:

- 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.

The screenshot displays the 'Flex' software interface for managing trial lenses. The top navigation bar includes 'Save', 'New Trial Lens', and 'Cancel' options. The patient information section shows 'NHS' and 'DIABETIC' tabs, a patient ID of '47', and a 'DOB' field. The 'This Examination Record' section lists the optician as 'Mr Optinet Staff Member' and the examination date as '09/01/2018'. The 'Last Sight Test Rx' section provides a table of vision data for both eyes. The 'Trial Lenses' section is the primary focus, showing a table of lens details for a pair of lenses. The table includes columns for Supplier, Description, BOZR, TD, BVP, Cyl, Axis, Add, Bk BOZR, Bk BVP, Tint, Colour, Rep. Schedule, Pack Size, and Price. The 'Lens Status' is set to 'On Trial'. The 'Staff Tasks' section includes checkboxes for 'Order Lenses', 'App To Collect', and 'Follow Up App', with radio buttons for 'No' and 'Yes'. The 'Additional Notes' section is empty.

## 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.



The screenshot shows the 'Flex' software interface with the 'Recall' tab selected. The top bar includes 'Save' and 'Cancel' buttons. Below this, there are tabs for 'NHS' and 'DIABETIC', and a patient identifier '47' with 'DOB:' and 'Ref:' fields. The 'This Examination Record' section shows 'Optician: Mr Optinet Staff Member', 'Date: 09/01/2018', and 'Time: 09:44'. The 'Last Sight Test Rx' section shows 'Optician', 'Date: 09/01/2017', and 'Time: 14:43'. The 'Medical Assessment' tab is active, showing 'Items for Billing' and 'Quick Pick Items'. The 'Items for Billing' table has columns for Description, Price, and Posted. The 'Quick Pick Items' section has a list of items with their descriptions and prices. The 'Available Items' section has a table with columns for Barcode, Description, Selling Price, and Eyeplan Price. The 'Recall' tab is highlighted in the bottom navigation bar.

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



**Flex™**

Save Cancel

**Mr Chris Gray** DOB: Ref:

**NHS** **GLAUCOMA** **DIABETIC**

This Examination Record

Optician: **Mr Optinet Staff Member** Date: **02/01/2018** Time: **13:22**

Type: **Aftercare**

Last Sight Test Rx

	VAU	Sph	Cyl	Axis	Add	VAA
Optician: <b>R</b>		<b>+1.00</b>	<b>Plano</b>	<b>0.0</b>	<b>1.00</b>	<b>6/5</b>
Date: <b>13/09/2016</b> <b>11:51</b>		<b>+2.00</b>	<b>Plano</b>	<b>0.0</b>	<b>1.00</b>	<b>6/5</b>

Refraction | Lens Fit | Recall

Aftercare Recall

Schedule: **ClS** Due In: **12 Months** Due Date: **02/01/2019**

Additional Recall

Schedule: **No Recalls** ☐ Override

Book Appointment

Due Date: **02/01/2018** ☐ Go to Diary

Staff Tasks

Assign to staff: **ALL**

Order Lenses: ☒ No ☐ Yes Right: **0** Left: **0**

App To Collect: ☒ No ☐ Yes **0** Weeks

Follow Up App: ☒ No ☐ Yes **0** Weeks

Additional Notes

Lens Status: **Primary Pair**

Px Advice

General Notes

Solutions

Enter Barcode Add Solutions

Description	Price

## Contact Lens Home Screen

**New** **Update** **Message** **Print** **Imaging** **Contact Lens**

**NHS** **DIABETIC** DOB: Ref:

Record | Sight Test | Contact Lenses | Px Notes | Lifestyle | Correspondence | Prefs. / App history | Timeline

Contact Lens Summary

Last Visit: **11/01/2018** Aftercare Recall Schedule: **ClS - 6/12 recall** Due Date: **11/07/2018**

Additional Recall Schedule: **No Recalls** Due Date:

View All Contact Lens Records

Primary Pair

Supplier	Description	BOZR	TD	BVP	Cyl	Axis	Add	BOZR 2	BVP 2
<b>R Vistakon</b>	<b>1-DAY ACUVUE</b>	<b>14.20</b>	<b>+1.00</b>	<b>+1.00</b>	<b>-2</b>	<b>1.00</b>	<b> </b>	<b> </b>	<b> </b>
<b>L Vistakon</b>	<b>1-DAY ACUVUE</b>	<b>14.20</b>	<b>+1.00</b>	<b>+1.00</b>	<b>4</b>	<b>1.00</b>	<b> </b>	<b> </b>	<b> </b>

Last Collection: **11/01/2018** Next Collection: **11/04/2018**

Secondary Pair

Supplier	Description	BOZR	TD	BVP	Cyl	Axis	Add	BOZR 2	BVP 2
<b>R COOPER VISION</b>	<b>Avala Vitality</b>	<b>8.40</b>	<b>14.20</b>	<b>+1.00</b>	<b>+1.00</b>	<b>-2</b>	<b>1.00</b>	<b> </b>	<b> </b>
<b>L COOPER VISION</b>	<b>Avala Vitality</b>	<b>8.40</b>	<b>14.20</b>	<b>+1.00</b>	<b>+1.00</b>	<b>4</b>	<b>1.00</b>	<b> </b>	<b> </b>

Last Collection:  Next Collection:

Trial Lenses

Date Issued	Right Lens	Left Lens	Status
<b>11/01/2018</b>	<b>1-DAY ACUVUE MOIST for Presbyopia (Medium)</b>	<b>1-DAY ACUVUE MOIST for Presbyopia (Medium)</b>	<b>On Trial</b>

Solutions Issued

Description	Price	Eyepan

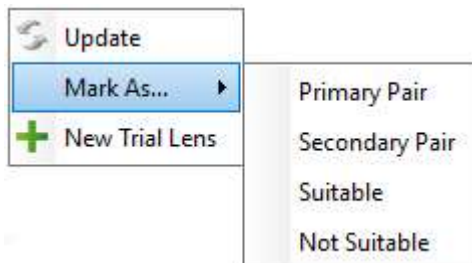
Px Advice

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**.

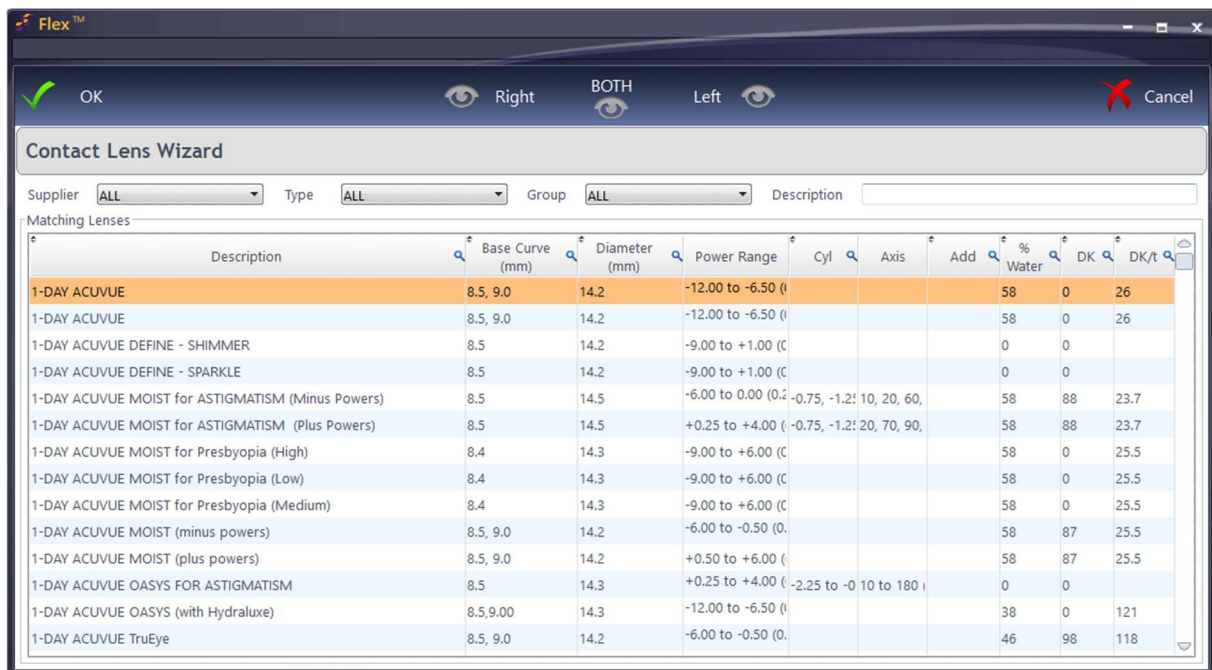
There are now separate collection dates for the **primary** and **secondary** pairs. Clicking collected will automatically skip the collection date ahead the same period as last time, or it can be adjusted manually.

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 Acuity: 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** **DOB:** **Ref:**

This Examination Record

Optician: **Mr Optinet Staff Member** Date: **02/01/2018** Time: **13:12**

Type: **Aftercare**

Last Sight Test Rx

Optician	Date	Time	VAU	Sph	Cyl	Axis	Add	VAA
R				+1.00	Plano	0.0	1.00	6/5
L	13/09/2016	11:51		+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
<b>R J&amp;J</b>	<b>1-DAY ACUVUE</b>	8.40	14.20	-5.25					
Type	Design	Design Options							
Soft	Spherical								
Tint	Colour	Rep. Schedule							
		Daily							
Pack Size	Price								
900	£0.00								

Supplier	Description	BOZR	TD	BVP	Cyl	Axis	Add	Bk BOZR	Bk BVP
<b>L J&amp;J</b>	<b>1-DAY ACUVUE</b>	8.40	14.20	-3.00					
Type	Design	Design Options							
Soft	Spherical								
Tint	Colour	Rep. Schedule							
		Daily							
Pack Size	Price								
900	£0.00								

Visual Acuity: Pre

Bino	6 /	0
Right	6 /	0
Left	6 /	0

Visual Acuity: Pre (N)

Bino	N
Right	N
Left	N

Over-Refracton

Sph	Cyl	Axis	Add	BVD
Right	Plano	0.00	0.0	0.00
Left	Plano	0.00	0.0	0.00

Corrected Rx

Sph	Cyl	Axis	Add
Right	-5.25	0.00	0.0
Left	-3.00	0.00	0.0

Visual Acuity: Post

Bino	6 /	0
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		
Left	-3.00		

## **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.

Branch  
Staff / Roles  
Patients  
Examinations

**Setup Contact Lens Data**

General Contact Lens Data Recall Lenses Test Types Tab Config

Test Type: **Aftercare**

Select a test type and customise the tabs

Tab Description	Tab Caption	Clinical Assessment	Display Order	Visible	Visible (Non CLO)
<b>Medical Assessment</b>	<b>Medical Assessment</b>		1	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinical Assessment 1	Clinical Assessment 1	TC CL check	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinical Assessment 2	Clinical Assessment 2		3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinical Assessment 3	Clinical Assessment 3		4	<input type="checkbox"/>	<input type="checkbox"/>
Anterior Eye	Anterior Eye		7	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Images And Sketches	Images and Sketches		8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Lens Refraction	Refraction		9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Lens Fit	Lens Fit		10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Clinical Billing	Billing		11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contact Lens Recall	Recall		12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact Lens Trials	New Trial Lenses		13	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

**Setup Contact Lens Data**

General Contact Lens Data Recall Lenses Test Types Tab Config

Test Types

Right click to copy an existing test type, or... **Add New Test Type**

Description	Sort Order	Active	Type
<b>Aftercare</b>	1	<input checked="" type="checkbox"/>	Aftercare
Trial Lens	2	<input checked="" type="checkbox"/>	Trial Lens
Fit / Trial	3	<input checked="" type="checkbox"/>	Other

**Auto-Billing**

Add auto-billing items for each test type. **Add Billing Items**

Item Description	Price	Eyeplan

**Authorized Staff**

Authorise staff to perform this test type. **Authorise Staff**

Staff Code	Firstname	Surname
All	Staff	Members

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