Optinet
SOFTWARE

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FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Sight Test

User Guide

Contents

Sight Test Overview

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

When a new **Sight Exam Record** has been selected, one of two windows will open. This will be dependent on whether or not you use the **Clinical Module**. Clinical gives Optometrists the ability to carry out customised Clinical Assessments, record up to 6 Rx's, create Clinical Drawings and add further detail.

Note that if there is any 'Notable Data', this will flash up automatically. See Clinical Assessment for more information (Clinical Users only)

Note: Users with "Clinical" installed that are not set as an Optometrist will still see the standard test record. The table below shows what you can expect to see.

Tab	Clinical	Non-Clinical
Medical Assessment	✔ Optoms	✔ Optoms
Clinical Assessment	✔	✘
Clinical Refraction	✔	Prescription
IOP / PD	✔	✔
Clinical Notes	✔	✔
Clinical Drawing	✔	✘
Clinical Billing	✔	✘
NHS / Recall	✔	✔

These differences are shown in the images below. If you DO have this module, you will see the first screen below. If you DO NOT, it will be the second screen.

Non-Clinical

Clinical

Medical Assessment

The start of the Examination is the Medical Assessment tab.

Any Previous **Examination Result** are shown towards the top of the screen.

(As below)

- o Click on any one of the previous sight tests, to open these up in a new window.

- o In the **General Assessment** section, drop-down boxes are available for answers to basic questions such as:

  - o Is patient is a **Driver**, **DSE** (Display Screen Equipment - Computer) **User**
  - o **Occupation**.
    - ▪ 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.
  - o 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. Press **Library** just under **Available Medication** to alphabetise the list if it is not already.
  - o Right-click on 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. It 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 with 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:

- o 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, More History** etc.).

- o The **Procedures** ("Questions") are shown on the left, and the **Result**s ("Answers") will be entered in the middle of the screen.
- o To enter a result, choose a result from the **Procedure Dictionary**.
- o In windows with two columns, double-clicking or dragging and dropping will have the same result.
- o 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.

- o Multiple results can be entered or double-click into the **Result / Right / Left** boxes to enter your own text.
- o *Tip*: Right-click to mark clinical results as 'Notable', these can then be viewed in subsequent examinations.
- o If there is notable data available, then a new button will appear at the top of the sight test examination window.
- o This is shown below. Entries can be removed/dismissed by highlighting them (CTRL-Left click to multi-select) and clicking the 'Dismiss Selected' button.

Clinical Refraction

This is where the Rx is entered. Clinical Users see this tab as **Clinical Refraction**, whilst non-clinical users see it as **Prescription.**

Non-Clinical users will only be able to enter one Rx. (Screenshot on following page)

Clinical Users can enter up to six types of tests and choose one as the *Given*. (Screenshot of following page)

- o The number of tabs shown (between 1 and 6), and their names, can be customised within the Examination Tab of the Setup menu, including the ability to copy the Pre-Exam result.

- o 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.

- o Clinical users can also **Transpose** the Rx accordingly. (Default value can be changed in the setup menu)

- o Press the tab to move between boxes. Validation of data occurs where necessary (for example if a Cyl has been entered, the Axis cannot be blank). The VA's can be entered in any format. "6/" and "N" (for near) will appear accordingly.

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

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

Clinical

Non – Clinical

OP/OD

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 (available under Setup Menu in the "Other" tab).

- o *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 (customisable in the same place as the TonometerAsusSamHe9000 above), their **Expiry, Dosage** and **Batch.**

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.

Corneal Thicknesses can also be entered on this screen.

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 the 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

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 The 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 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.
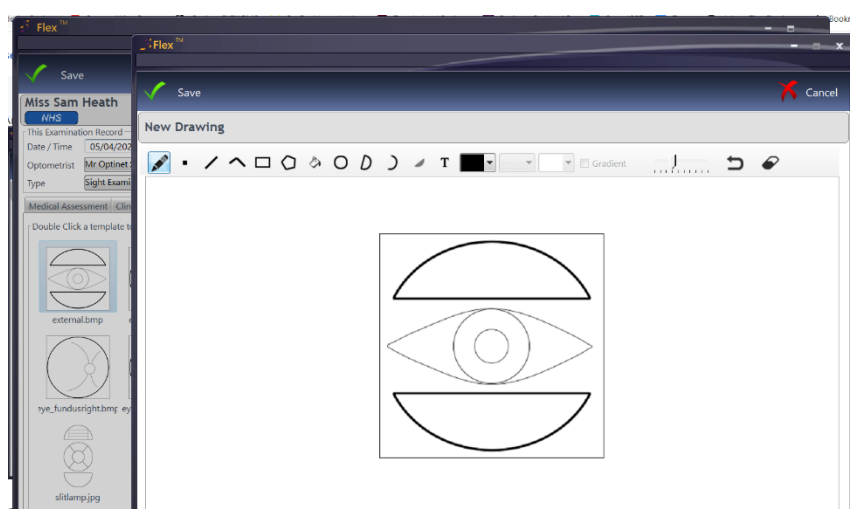
Clinical Drawing

(This page is only shown with the Clinical Module. Non-Clinical users should continue to recall tab)
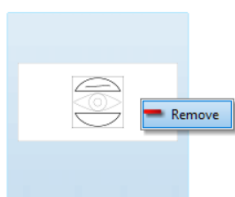
Within the Clinical Drawing section, an Optom can detail and not any abnormalities observed. Images can be imported or the templates can be used, which can be annotated with the drawing tools and saved as needed.

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 the box)a
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.

To undo your last action, use the 'erase' at the end of the toolbar.

If you have saved a drawing but no longer need it. Simply right click, Remove.

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.** This list can be filtered further using the **Sales Group** dropdown menu.

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.

Automation can be added to this, where Private Patients are automatically charged certain items and NHS Patients are charged others. If you are looking back at this examination after it has been saved, the "Posted" tick box will be checked, showing that this chair time has already been charged.

Recall and Early Retest Reasons

A **Recall** must now be added to Sight Exam Record for FLEX to save.

FLEX will give the following message to prompt for a recall to be added.

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.

Recommendations can be ticked 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.

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. The Due Date itself can also be manually entered.

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

To streamline the completion of the sight examination record and where options have been enabled in setup, a summary of errors will be displayed when saving the record. If none of the sight exam forced validation options have been enabled in branch setup, the window will not be displayed. These can be customised under Menu - Setup - Branch.

Printing Documents

When a sight exam or contact lens window is closed, it is possible to have a "Print" option appearing when saving, listing forms (e.g GOS 2) & Letter templates (eg RX Forms) to print. Letter templates and forms can be marked as available for printing within the communications screen setup.

Initial Setup

1) Under Menu – Setup – Branch Data, ensure "Open The Print Shortlist…" is ticked.
2) Under Menu – Setup – Communication, all Letters and Forms have ticked boxes at the end of their rows.
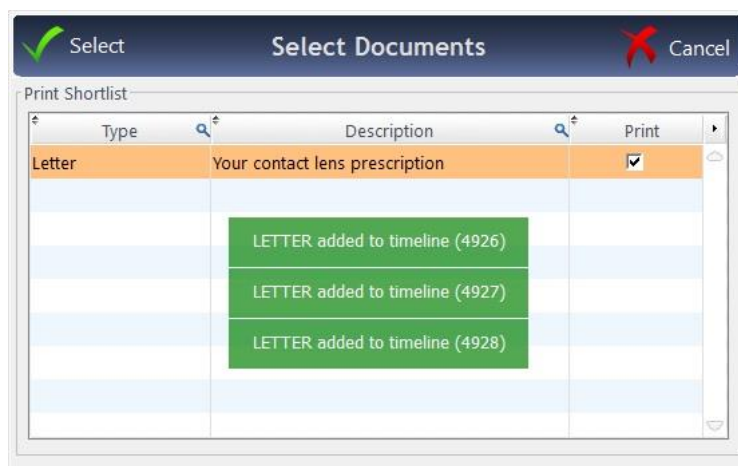
These are shown below:

Colour and Duplex are not relevant for this section, but you can set that when you save the ST/CL, the letter in question will pop up depending on **Shortlist ST** or **Shortlist CL** being ticked.

In Practice

When saving a Sight Test or Contact Lens, the following box will appear, asking which letter(s) should be printed.

Customise Clinical Records

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 on 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** 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.

| Exams and Tabs | Procedures | Dictionary | Refraction | Billing | Contact Lens |

Rx Types

Description	Final Rx	Phoropter Rx	Rx From PreExam	Active	▸
Objective 1	☐		☐	☐	
Objective 2	☐		☐	☐	
Objective 3	☐		☐	☐	
Subjective	☐		☐	☑	
Actual	☐		☐	☑	
Given	☑		☐	☑	

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.

Adding Colours o Refraction Tabs

Adding a strip of colour to a refraction tab makes it easier to see which refraction you are working with.

To add your chosen colour to refraction tab simply pick the colour from the drop down list in the "colour" column. The chosen colour will appear to the right of the column as a preview.

Note: Changes made here affect all branches