

Optinet™  
**FLEX**  
ADVANCED PRACTICE MANAGEMENT SOFTWARE



A guide to creating and customising Clinical Records in FLEX from Optinet.

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## **Introduction**

Welcome to Clinical Records in FLEX from Optinet. Whether this is your first experience of using Clinical Records, or you have used other systems in other practices, I hope you find this guide and our range of resources beneficial.

There are two versions of FLEX – Clinical and non-Clinical. The non-Clinical, broadly speaking, is just to log a prescription, notes and a recall, whilst the Clinical version gives you the ability to create your own bespoke assessments, enter several RX's, generate your own letters, create clinical drawings and much more.

We appreciate that creating Clinical Records on a computer are a large inherent change, and we are here to help through these training manuals, which in turn are lifted from the online help system at <http://help.optinetuk.net> – this can be accessed using the blue question mark in the top corner of FLEX.

You can also book remote telephone training sessions to help you get to grips with areas you may be struggling with, or to help you maximise the potential of the software. These sessions and the web help are included in your monthly charge.

Also, it is not uncommon for practices to book further training, one to three months after the initial training to capitalise on the system.

The support team will be happy to help you with any queries every weekday from 8:45 to 5:30, and also offer a limited service on Saturdays from 9:00 to Noon. Our “FLEXpress” newsletter, available by email to share with your colleagues, details our “Appointment to View” webinars, links to watch video support and give your feedback on the software. It also includes Quick Tips, Diary Dates and details of the latest National Eyecare Group offers available.

Finally, may I wish you the very best of luck with FLEX Clinical, and if there is anything else I can help with, you can also contact me personally using the details below.

Yours Faithfully,

Chris Gray

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## Preface: 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. Various information can be entered, depending how much of the system the practice wishes to use, but broadly speaking will involve:

- 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

The screenshot shows the Flex software interface for a General Assessment form. The window title is "Flex™". At the top, there are "Save" and "Cancel" buttons. The patient name is "Mr Flex Training" and the reference number is "Ref: 12921". The date of birth is "DOB: 01/01/1984 (31 yrs)".

The form is titled "This Pre-Exam Record" and includes the following fields:

- Date / Time: 25/08/2015 09:39
- Staff: Optinet Staff Member

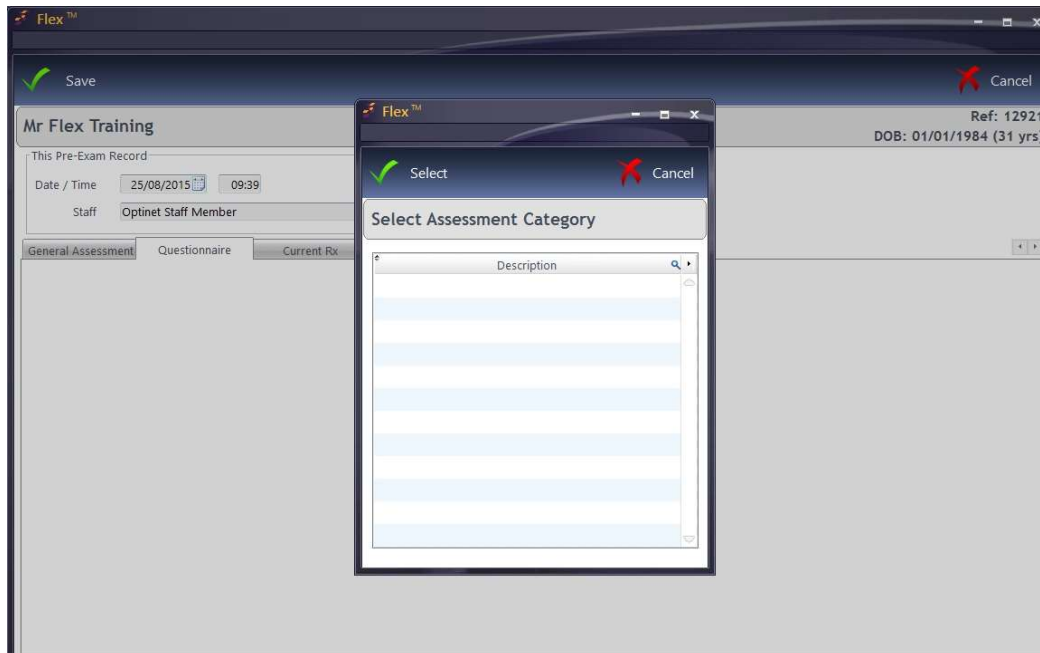
The form is divided into several sections:

- General Assessment:**
  - Driver? (dropdown menu)
  - DSE User? (dropdown menu)
  - Occupation: (dropdown menu with a green + button)
  - Px Occupation: (dropdown menu with a green + button)
  - Occupation Notes: (text area)
- Medication:**
  - Current Medication: (table with columns: Medicine, Added, Removed)
  - Available Medication: (list of medicines including Alendronic acid, Allopurinol, Amitriptyline, Amlodipine, Amoxicillin, Aspirin, Atenolol, Atorvastatin, Atropine, Beclometasone dipropionate, Bendroflumethiazide, Benzylpenicillin)

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.

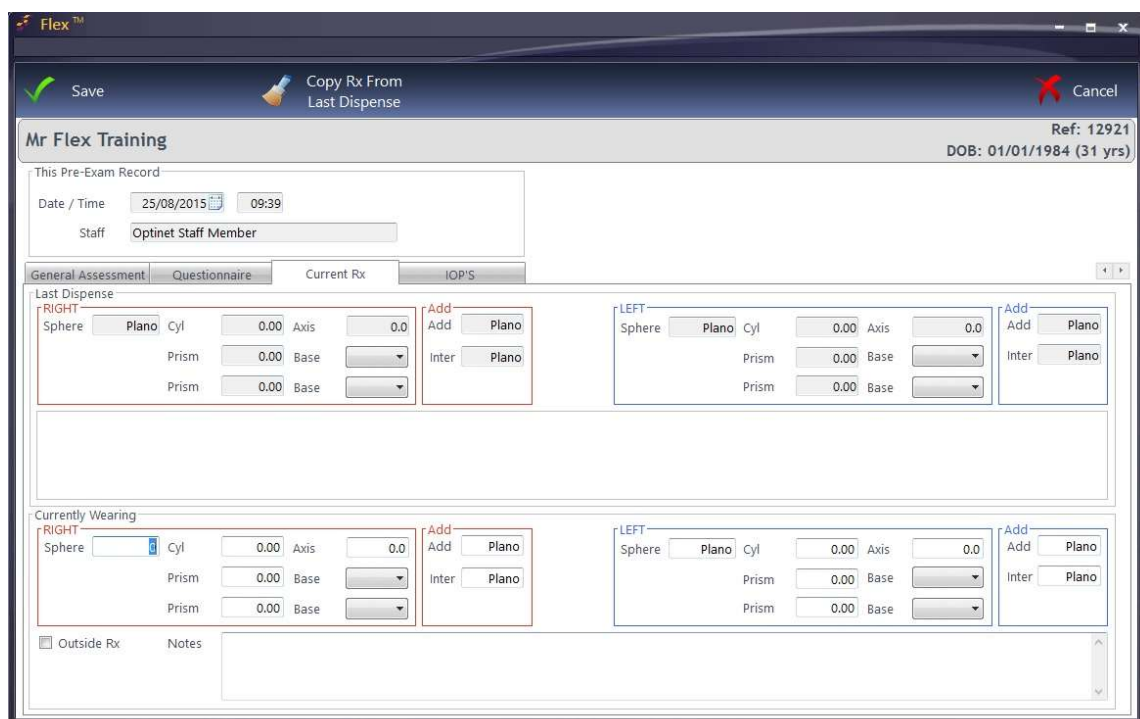
**Medication** details can be taken on the right-hand side, although many practices prefer to leave this information for the Optometrist to fill out.

## Questionnaire



In a similar method to the [Clinical Assessment](#), 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. To set these questions up, please see [How Do I Update my Clinical Setup?](#) -make sure the "Pre-Exam" column has a tick in the box in the setup when you create this.

## 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 (i.e. they haven't had any change / been anywhere else), 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 and in **Notes** may write "Jones Opticians, 8/14" so the Optom has more details about this Rx. The Optom is able to use these results in his / her [Clinical Refraction](#) if they wish.

## IOP's

The screenshot shows the Flex software interface for a patient named Mr Flex Training. The patient's details include Ref: 12921 and DOB: 01/01/1984 (31 yrs). The interface is currently on the 'IOP'S' tab, which is part of the 'General Assessment' section. The 'IOP Readings' section is active, showing input fields for 'Right IOP' and 'Left IOP'. Each eye section has a 'Tonometer' dropdown menu, an 'Eye Drops' dropdown menu, and four input boxes for '1st IOP', '2nd IOP', '3rd IOP', and '4th IOP', each with a corresponding '1st Time', '2nd Time', '3rd Time', and '4th Time' input box. There are also input boxes for 'Ø mmHg' and 'Ø kPa' for each eye. The interface also includes a 'Save' button and a 'Cancel' button.

Finally, **IOP Readings** can be entered. Select the **Tonometer** used (see the [Sight Test](#) setup for more detail) 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

## Section 1: 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.

Date	Time	Eye	Sphere	Cyl	Axis	Prism	Add
29/12/2014	10:22	Right	Plano	0.00	0.00	0.00	0.00
		Left	Plano	0.00	0.00	0.00	0.00

Medicine	Added	Removed

- Alendronic acid
- Allopurinol
- Amitriptyline
- Amlodipine
- Amoxicillin
- Aspirin
- Atenolol
- Atorvastatin
- Atropine
- Beclometasone dipropionate
- Bendroflumethiazide
- Benzylpenicillin

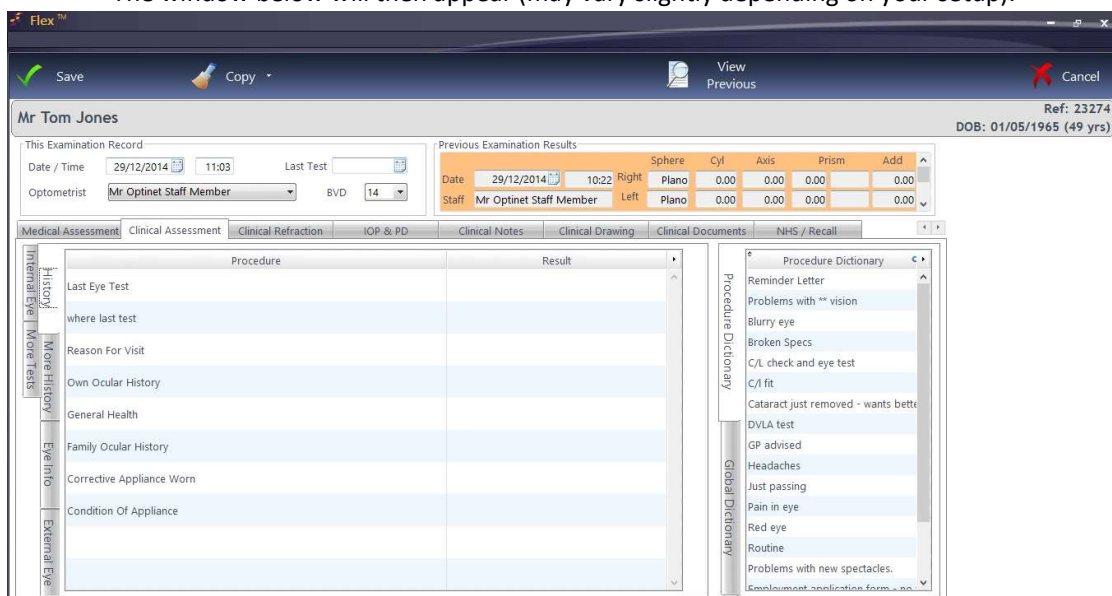
## Clinical Assessment

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. This is covered initially on the training day, but we recommend further remote training as necessary to help with this. See the [Examination Setup](#) for more details: online or in the second part of this document.

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:



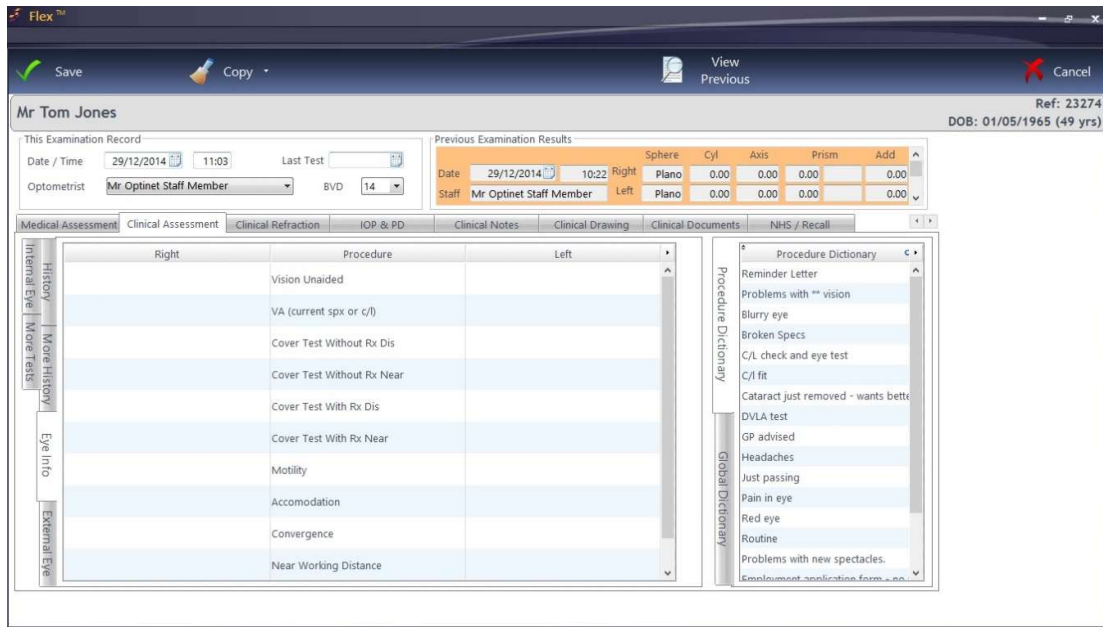
The window below will then appear (may vary slightly depending on your setup).





The tabs for the examination are shown on the far left (**History, More History** 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.

Use the **Copy** button to bring across results from the last sight exam record (the results which can be copied across are customisable in the [How Do I Update my Clinical Setup?](#) Tab online).

Use the **View Previous** tab to show previous Clinical Assessments.

## Clinical Refraction

This is where the Rx is entered. Again, the **View Previous** facility is available as in the [Medical Assessment](#).

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 [Examination](#) Tab of the Setup menu. The Pre-Exam results can automatically populate – see the setup for more information.

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 shows the Flex software interface for Clinical Refraction. The patient name is Mr Chris Gray, and the date of the examination is 15/08/2016 at 15:51. The interface is divided into several sections: 'This Examination Record', 'Previous Examination Results', and a grid of input fields for various tests. The 'Clinical Refraction' tab is active, showing fields for 'Objective 1', 'Objective 2', 'Objective 3', 'Subjective', 'Actual', and 'Given' tests. Each test has fields for 'Right' and 'Left' eyes, with sub-fields for Sph, Cyl, Axis, Prism H, Prism V, and Base. There are also checkboxes for 'Balance Lens' and 'Pinhole'. The 'Given' test is highlighted in red. The interface also includes a 'Previous Examination Results' section and a 'Notes' section.

## 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 (available under [Setup - How Do I Update My Exams?](#) and the "Other" tab). 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 Tonometers above), their **Expiry**, **Dosage** and **Batch**. **Corneal Thicknesses** can also be entered on this screen.

The screenshot shows the 'IOP & PD' tab in the Flex software. The patient is identified as 'Mr FLEX Testing' (DOB: 01/01/1984, 35 yrs). The examination record shows a 'Sight Examination' performed on 28/11/2019 at 13:48 by 'Mr Optinet Staff Member'. The interface is divided into several sections: '1st: IOP Readings' and '2nd: IOP Readings', each with fields for 'Device', 'Tonometer', 'Eye Drops', 'Expiry', 'Dosage', and 'Batch #'. Below these are four boxes for 'Right IOP', 'Left IOP', '2nd Right IOP', and '2nd Left IOP', each containing four rows for '1st IOP' through '4th IOP' and a 'Ø mmHg' field. At the bottom, there are sections for 'Right PD', 'Left PD', 'Right Corneal Thickness', and 'Left Corneal Thickness', with fields for 'Dist PD', 'Int PD', 'Near PD', and 'CCT (µm)'. A 'View IOP History' button is located in the bottom right corner.

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:



Both Clinical and non-Clinical users will now move onto the [Clinical Notes](#) 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 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. Give us a call on 0845 313 0233 if you would like a hand with this.

The screenshot shows the Flex software interface for a patient named Mr Tom Jones. The window title is "Flex™". The interface includes a top bar with "Save", "View Previous", and "Cancel" buttons. The patient's name "Mr Tom Jones" and reference number "Ref: 23274" are displayed. The "DOB: 01/05/1965 (48 yrs)" is also shown. The "This Examination Record" section contains fields for "Date / Time" (15/04/2014 11:49), "Last Test" (15/04/2014), "Optometrist" (Mr Optinet Staff Member), and "BVD" (14). The "Previous Examination Result" section includes a table for refractive error data:

	Sphere	Cyl	Axis	Prism	Add
Right	Plano	0.00	0	0.00	0.00
Left	Plano	0.00	0	0.00	0.00

Below the table are tabs for "Medical Assessment", "Clinical Assessment", "Clinical Refraction", "IOP & PD", "Clinical Notes" (selected), "Clinical Drawing", "Clinical Documents", and "NHS / Recall". The "Clinical Notes" tab contains several text input areas: "Enter notes relating to the sight test here:", "Patient Advice", "Referral Advice" (with a checked "Referred to GP" checkbox), and "Dispensing Advice".

Right-click and choose "Insert Paragraphs" to insert frequently used text – see [How Do I Set Up Paragraphs](#) online for more information.

## Clinical Drawing

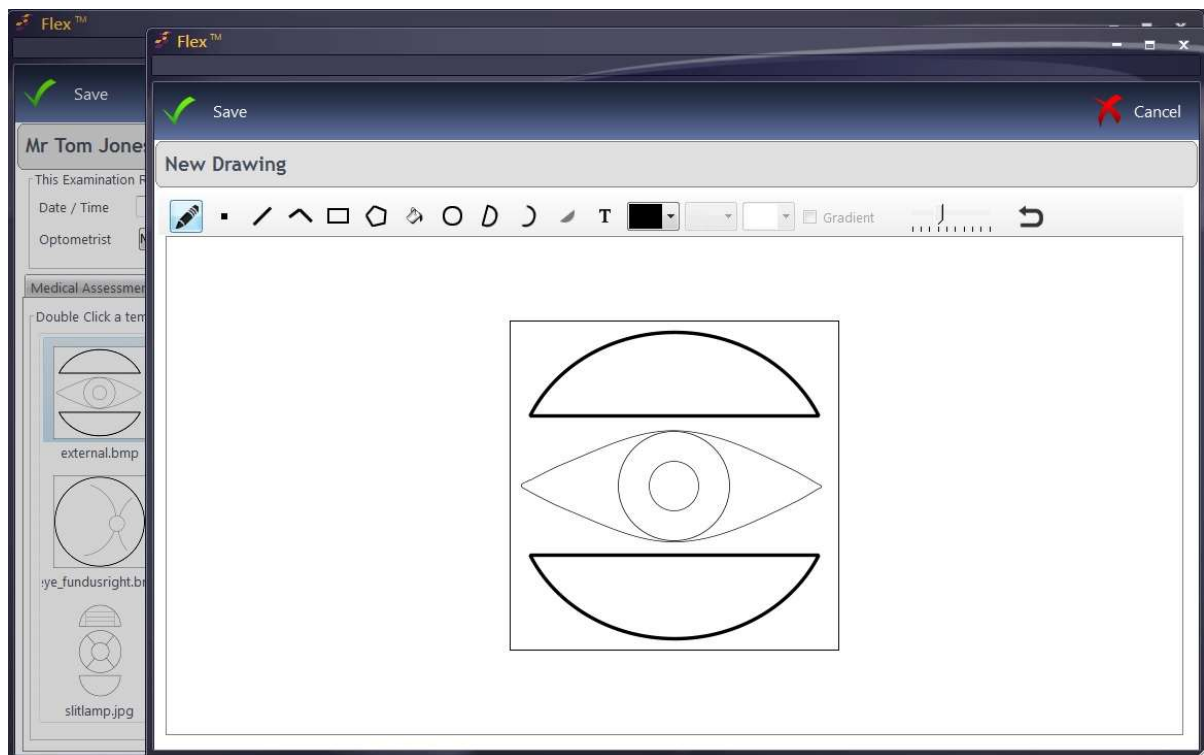
Within the Clinical Drawing section, an Optom can detail and note any abnormalities observed. Images can be imported or the templates can be used, which can be annotated with the drawing tools and saved as needed.

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

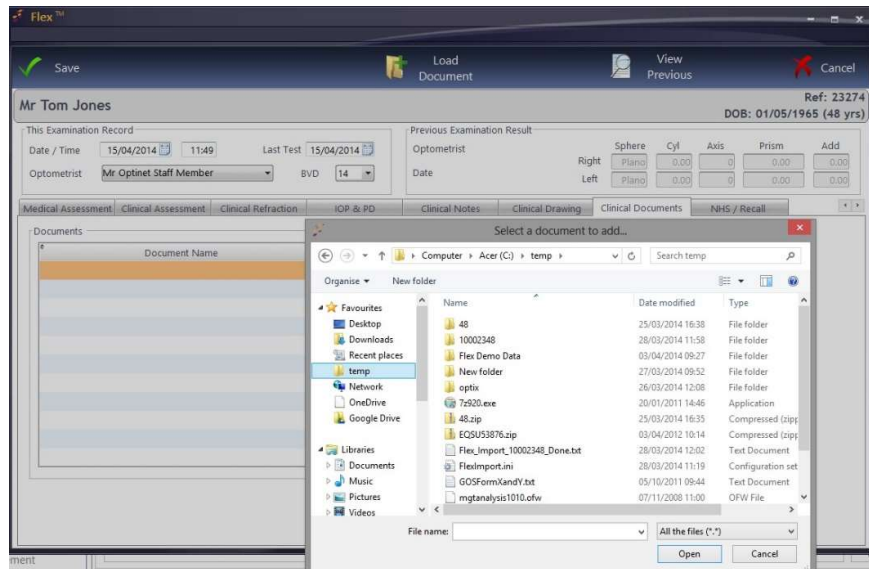
Arrow: Undo feature



Press **Save** when complete, and then move onto the [Clinical Documents](#) tab.

## Clinical Documents

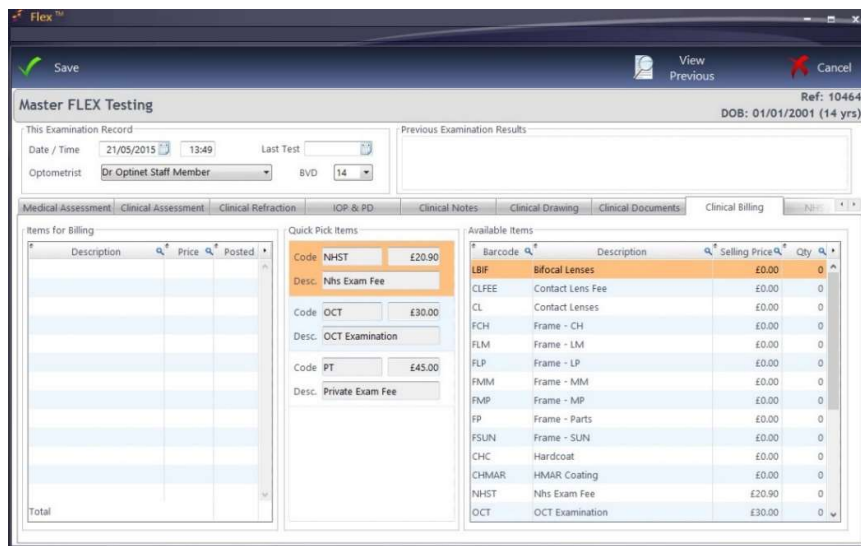
Optoms can attach any Clinical Documents required to the assessment. Click **Load Document** and browse to the relevant file in Windows. Press **Open** in the box and it will be added to the assessment.



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.

The screenshot shows the Flex software interface for a patient's NHS/Recall record. The patient is Mr Ab Aah-Test, Ref: 7390, DOB: 01/02/1979 (35 yrs). The interface includes fields for 'This Examination Record' (Date/Time: 06/06/2014 13:32, Last Test: 12/09/2000, Optometrist: Dr Optinet Staff Member, BVD: 14) and 'Previous Examination Result' (Right: Plano 0.00, Left: Plano 0.00). The 'NHS / Recall' tab is active, showing 'NHS Entitlement' (Early Retest, 1st/2nd Voucher, Evidence Seen, GOS Entitlements) and 'Recall' (Selected Recalls, Available Recalls). The 'Available Recalls' table shows:

Description	Months	Type
Child	12	SE
Rem	12	SE

The 'Recommendations' panel on the right lists various options: Single Vision, Bifocal, Varifocal, Hi Index Material, Polycarbonate, Aspheric, UV Filter, Anti Reflection, Scratch-resistant, Photochromic, and Contact Lenses.

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.

Flex  
Logged in as Optinet Staff Member Branch: Malvern (ID: 1) Version: 1.3.86.0 SMS & Email Notifications: DISABLED Thursday 17 April 14:19:50

Home Mgr. Home

Branch  
Staff / Roles  
Patients  
Examinations  
Clinical  
Contact Lens  
Sight Tests  
Schemes  
Appointments  
Orders  
Stock  
Communication  
Till  
System

Setup Clinical

Exams and Tabs Procedures Dictionary Refraction Contact Lens

Exam Types	Description	ST	CL	Active?
Standard Eye Examination		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C/L Assess.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
C/L External Eye		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dry Eye Assessment		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Exam	Category	Tab	Order
Standard Eye Examination	History		1
Standard Eye Examination	External Eye		4
Standard Eye Examination	Eye Info		3
Standard Eye Examination	More History		2
Standard Eye Examination	Internal Eye		5
Standard Eye Examination	More Tests		6

Tabs	Tab Heading	# Cols
History		2
More History		2
Eye Info		3
External Eye		3
Internal Eye		3
More Tests		2
Lifestyle		2
Symptoms		3

Select your Exam Type, then Drag and Drop your Tabs to build your exam  
Change the order in which the tabs will appear  
You can have up to 10 tabs in each exam

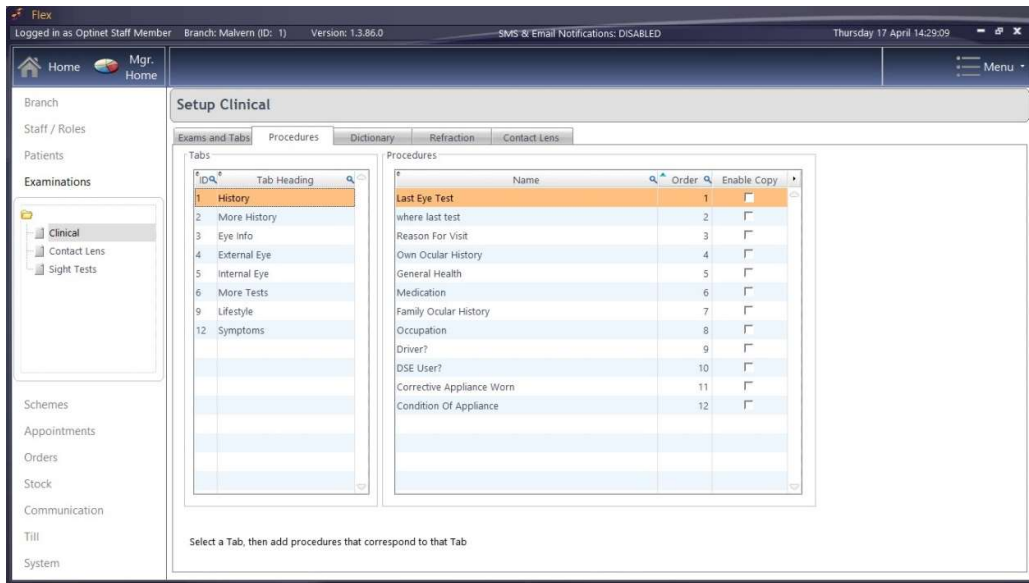
### Procedures:

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.



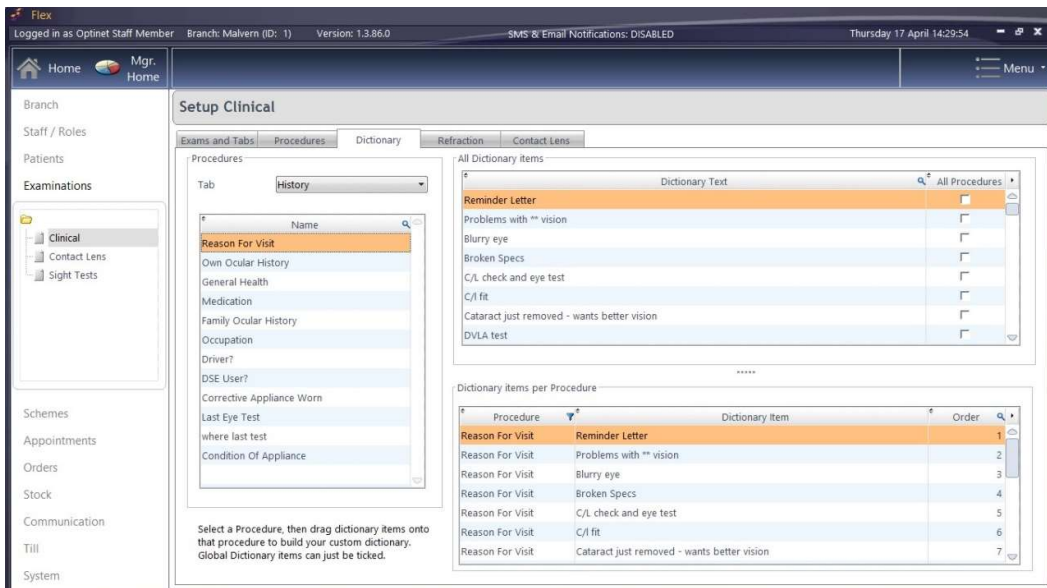


**Dictionary:**

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.

Description	Final Rx	Phoropter Rx	Rx From PreExam	Active
Objective 1	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Objective 2	<input checked="" 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:

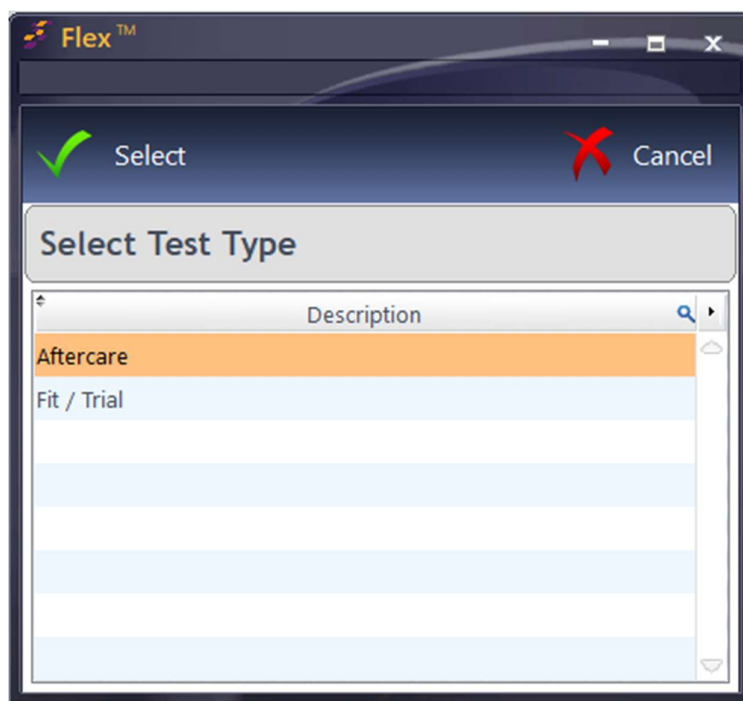
Barcode	Description	Price (£)
00001	00001	00.00
00002	00002	00.00
00003	00003	00.00
00004	00004	00.00
00005	00005	00.00
00006	00006	00.00
00007	00007	00.00
00008	00008	00.00
00009	00009	00.00
00010	00010	00.00
00011	00011	00.00
00012	00012	00.00
00013	00013	00.00
00014	00014	00.00
00015	00015	00.00
00016	00016	00.00
00017	00017	00.00
00018	00018	00.00
00019	00019	00.00
00020	00020	00.00
00021	00021	00.00
00022	00022	00.00
00023	00023	00.00
00024	00024	00.00
00025	00025	00.00
00026	00026	00.00
00027	00027	00.00
00028	00028	00.00
00029	00029	00.00
00030	00030	00.00
00031	00031	00.00
00032	00032	00.00
00033	00033	00.00
00034	00034	00.00
00035	00035	00.00
00036	00036	00.00
00037	00037	00.00
00038	00038	00.00
00039	00039	00.00
00040	00040	00.00
00041	00041	00.00
00042	00042	00.00
00043	00043	00.00
00044	00044	00.00
00045	00045	00.00
00046	00046	00.00
00047	00047	00.00
00048	00048	00.00
00049	00049	00.00
00050	00050	00.00
00051	00051	00.00
00052	00052	00.00
00053	00053	00.00
00054	00054	00.00
00055	00055	00.00
00056	00056	00.00
00057	00057	00.00
00058	00058	00.00
00059	00059	00.00
00060	00060	00.00
00061	00061	00.00
00062	00062	00.00
00063	00063	00.00
00064	00064	00.00
00065	00065	00.00
00066	00066	00.00
00067	00067	00.00
00068	00068	00.00
00069	00069	00.00
00070	00070	00.00
00071	00071	00.00
00072	00072	00.00
00073	00073	00.00
00074	00074	00.00
00075	00075	00.00
00076	00076	00.00
00077	00077	00.00
00078	00078	00.00
00079	00079	00.00
00080	00080	00.00
00081	00081	00.00
00082	00082	00.00
00083	00083	00.00
00084	00084	00.00
00085	00085	00.00
00086	00086	00.00
00087	00087	00.00
00088	00088	00.00
00089	00089	00.00
00090	00090	00.00
00091	00091	00.00
00092	00092	00.00
00093	00093	00.00
00094	00094	00.00
00095	00095	00.00
00096	00096	00.00
00097	00097	00.00
00098	00098	00.00
00099	00099	00.00
00100	00100	00.00

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.

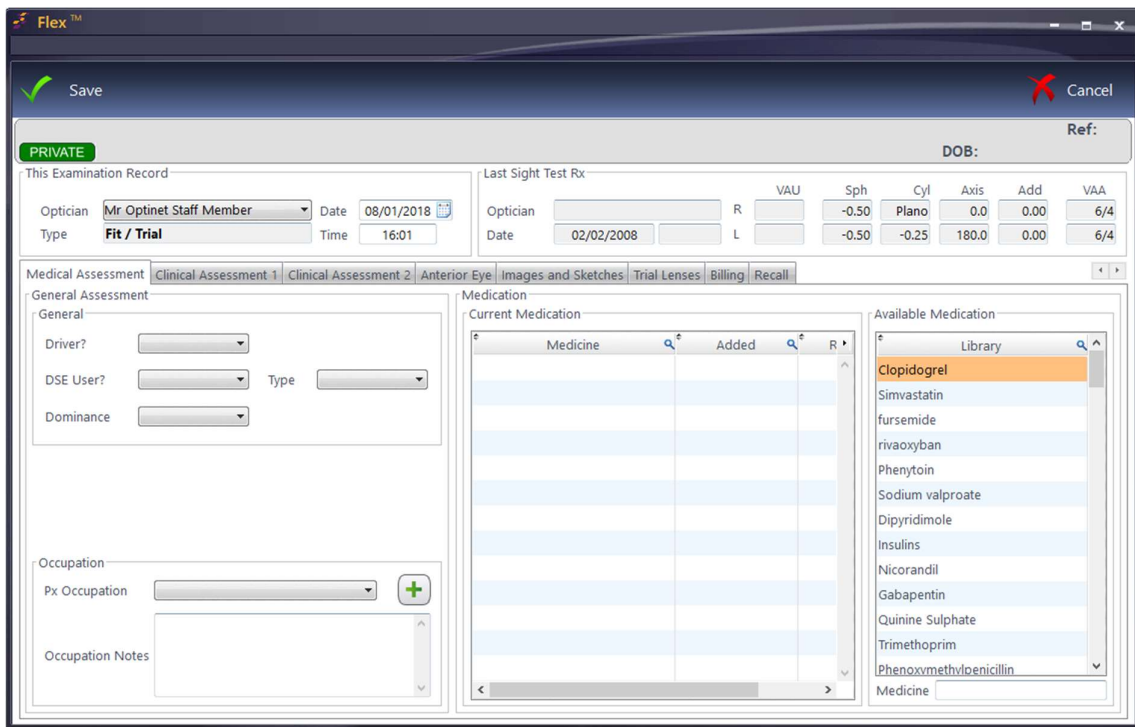
### Medical Assessment

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.

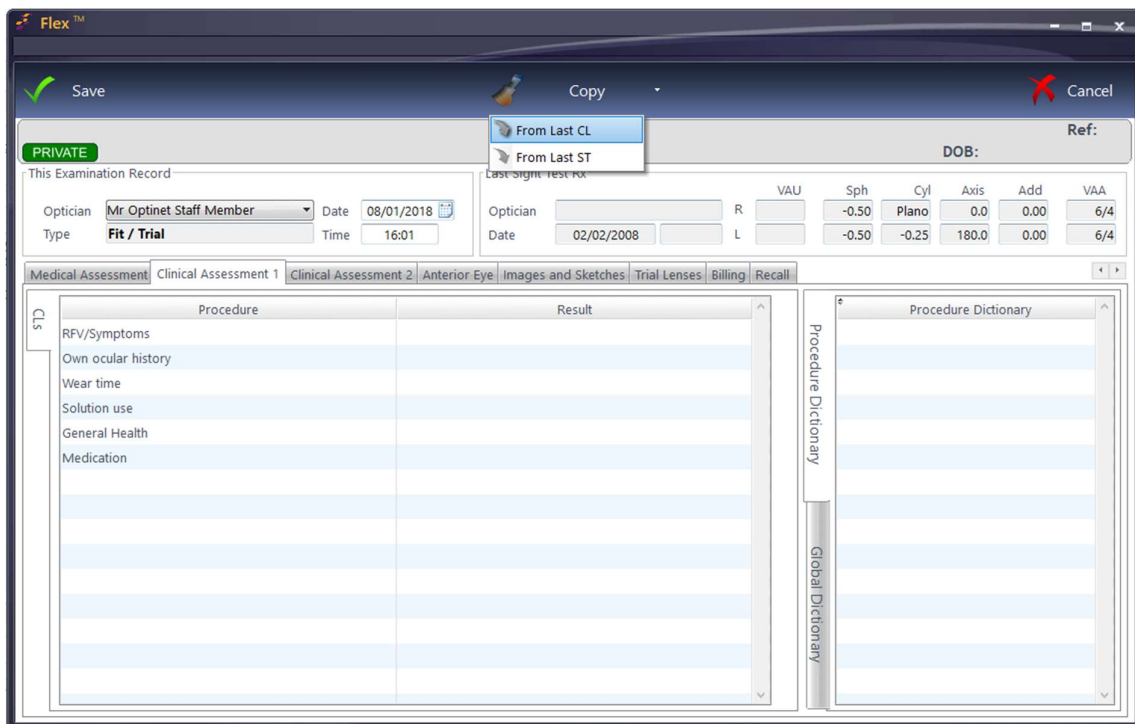
Whenever a new sight test, contact lens or pre-exam record is created the most recent details are automatically loaded in, regardless of which type of test was done previously. For example, if you have a previous pre-exam record and open a new contract lens record, it will load the details from the previous 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.

Flex™

Save Cancel

PRIVATE

This Examination Record

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

Optician: R VAA Sph Cyl Axis Add VAA  
Date: 02/02/2008 L VAA Sph Cyl Axis Add VAA  
6/4 -0.50 Plano 0.0 0.00 6/4 -0.50 -0.25 180.0 0.00

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

Keratometry

	Hoz.	Vert.
Right	0.00 @ 0.00	0.00 @ 0.00
Left	0.00 @ 0.00	0.00 @ 0.00

Diameters

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

Notes

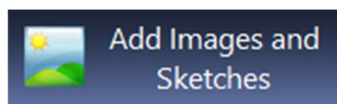
Grading

	Right	Left	
Conjunctival Redness	0 1 2 3 4	0 1 2 3 4	0-Normal
Limbal Redness	0 1 2 3 4	0 1 2 3 4	1-Trace
Corneal Neovascularisation	0 1 2 3 4	0 1 2 3 4	2-Mild
Epithelial Microcysts	0 1 2 3 4	0 1 2 3 4	3-Moderate
Corneal Oedema	0 1 2 3 4	0 1 2 3 4	4-Severe
Corneal Staining	0 1 2 3 4	0 1 2 3 4	
Conjunctival Staining	0 1 2 3 4	0 1 2 3 4	
Papillary Conjunctivitis	0 1 2 3 4	0 1 2 3 4	
Blepharitis	0 1 2 3 4	0 1 2 3 4	
Meibomian Dysfunction	0 1 2 3 4	0 1 2 3 4	
Superior Limbic Keratoconjunctivitis	0 1 2 3 4	0 1 2 3 4	
Corneal Infiltrates	0 1 2 3 4	0 1 2 3 4	
Corneal Ulcer	0 1 2 3 4	0 1 2 3 4	
Endothelial Polymegethism	0 1 2 3 4	0 1 2 3 4	
Endothelial Blebs	0 1 2 3 4	0 1 2 3 4	
Corneal Distortion	0 1 2 3 4	0 1 2 3 4	

Images and Sketches

Add Images and Sketches

## Images & Sketches

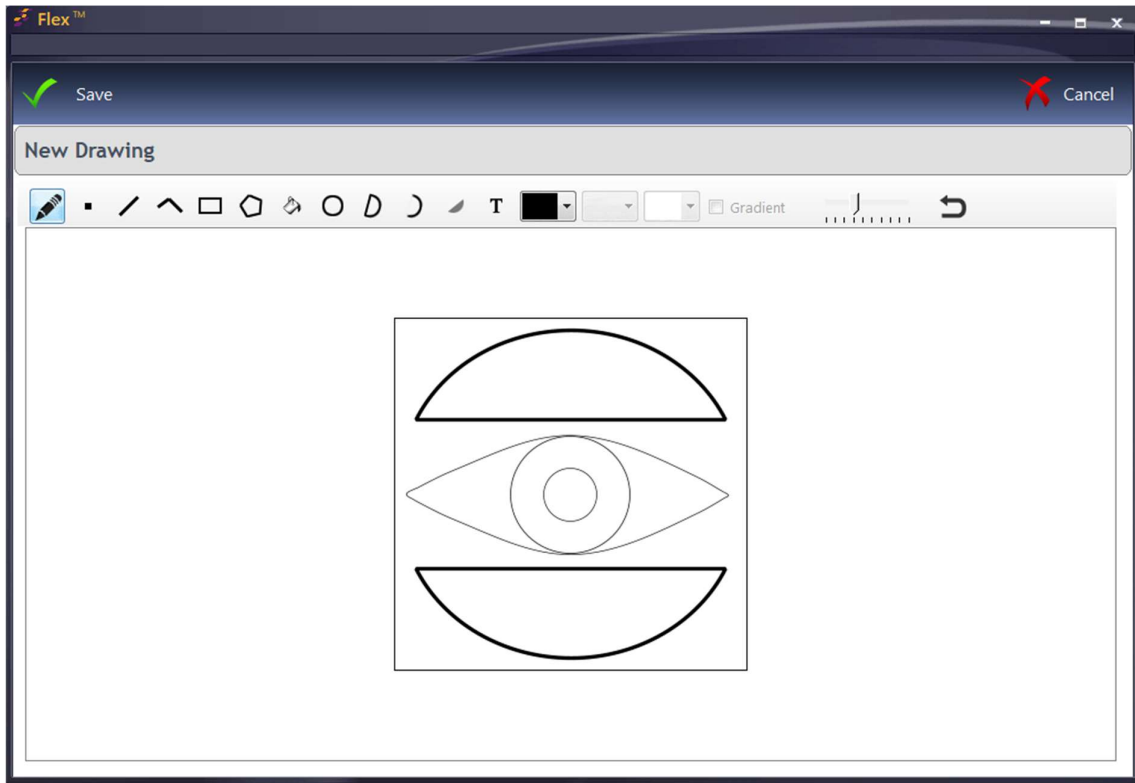


The Images and Sketches tab can be used to add any imagery required. The 'Add Images and Sketches' button can be used to import files from your computer into Flex or to load a sketch from the existing Flex library.

Here you can:

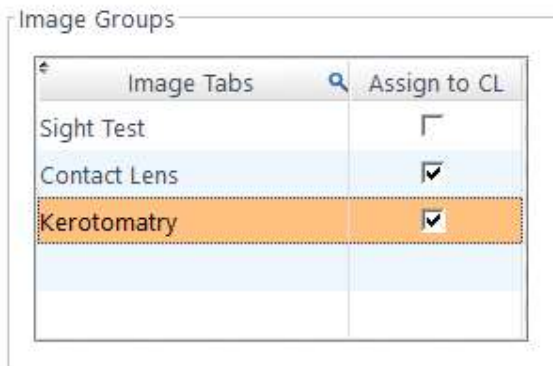
- Double click on the sketch templates at the top of the window to add them to the record.
- Double click existing images to edit them.
- Edit the notes for any existing images.

- 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**.

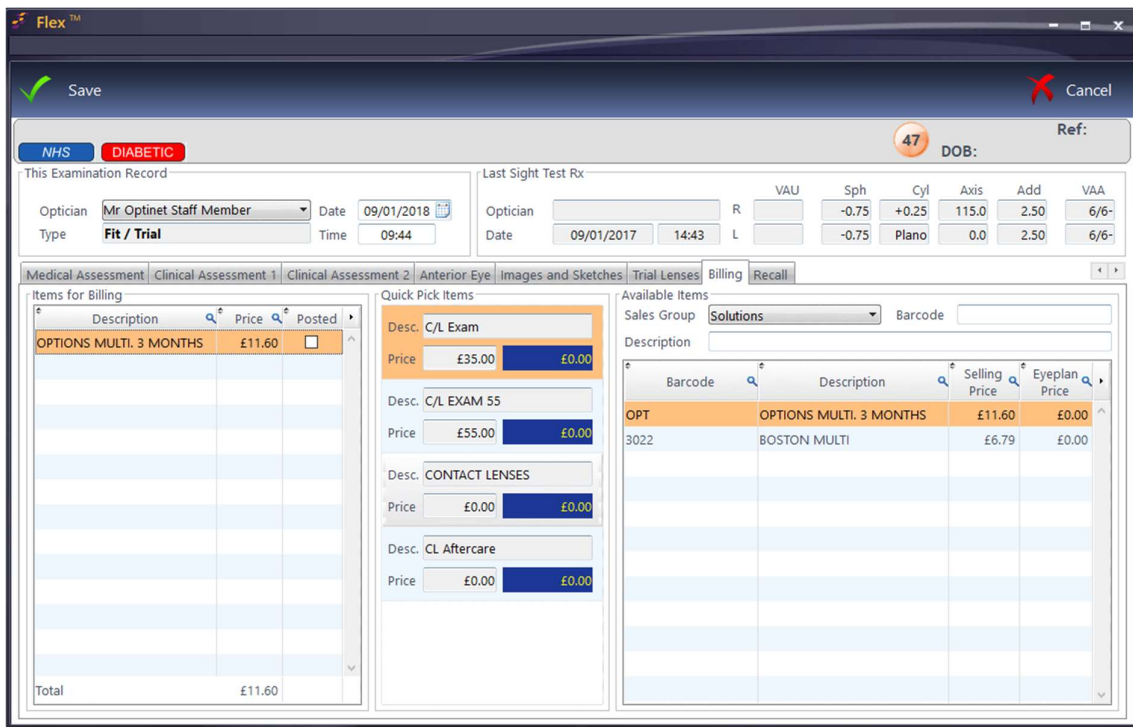
Within this tab, you can also change the **status** of the lenses if needed, add any **advice** given to the patient about the trial lenses and also set up **staff tasks** to be created.

VAU	Sph	Cyl	Axis	Add	VAA
R	-0.75	+0.25	115.0	2.50	6/6-
L	-0.75	Plano	0.0	2.50	6/6-

## 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



Flex™

Save Cancel

**Mr Chris Gray** Ref:

NHS **GLAUCOMA** **DIABETIC** DOB:

This Examination Record Last Sight Test Rx

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

	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

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 Weeks: 0  
 Follow Up App:  No  Yes Weeks: 0

Lens Status: Primary Pair

Px Advice

General Notes

Solutions  
 Enter Barcode

Description	Price

### Contact Lens Home Screen

New Update Message Print Imaging Contact Lens

NHS **DIABETIC** DOB:

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: R Vistakon Description: 1-DAY ACUVUE  
 L Vistakon Description: 1-DAY ACUVUE  
 BOZR: 14.20 TD: 14.20 BVP: +1.00 Cyl: +1.00 Axis: -2 Add: 1.00 BOZR 2: BVP 2:  
 14.20 14.20 +1.00 +1.00 4 1.00  
 Last Collection: 11/01/2018 Next Collection: 11/04/2018

Secondary Pair  
 Supplier: R COOPER VISION Description: Avaira Vitality  
 L COOPER VISION Description: Avaira Vitality  
 BOZR: 8.40 TD: 14.20 BVP: +1.00 Cyl: +1.00 Axis: -2 Add: 1.00 BOZR 2: BVP 2:  
 8.40 14.20 +1.00 +1.00 4 1.00  
 Last Collection:  Next Collection:

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

Solutions Issued  

Description	Price	Eyeplan

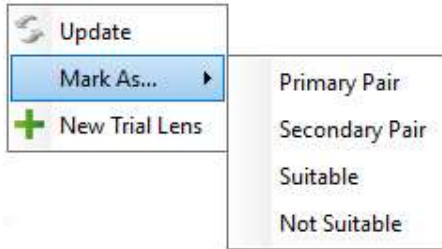
 Px Advice: \*\*\*\*\*

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

Primary Pair	
Supplier	Description
R Johnson & Johnson	1-DAY ACUVUE MOIST for ASTIGMATISM (Minus Powers)
L Johnson & Johnson	1-DAY ACUVUE MOIST for ASTIGMATISM (Minus Powers)
<input checked="" type="checkbox"/> Collected	Next Collection In: 6 Weeks, Next Collection Date: 02/03/2018

Secondary Pair	
Supplier	Description
R CooperVision	Avaira (plus powers)
L CooperVision	Avaira (plus powers)
<input checked="" type="checkbox"/> Collected	Next Collection In: 3 Months, Next Collection Date: 19/04/2018

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.

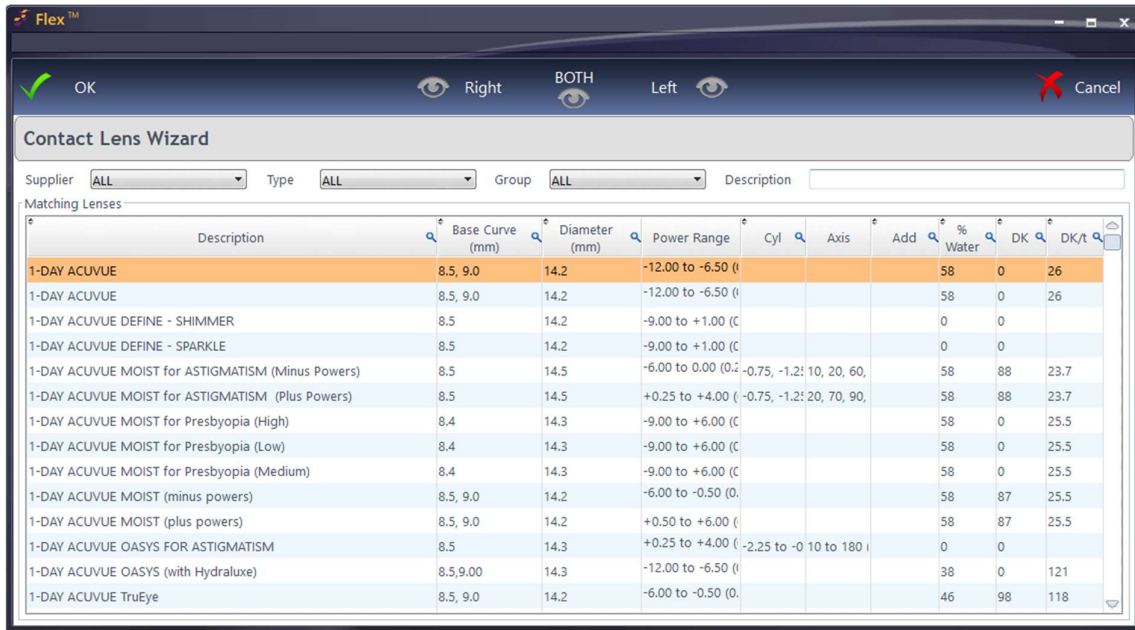
Collection dates can also be updated when collecting a contact lens order. If the order is for the patient's primary or secondary pair of lenses, the contact lens collection dates will appear when marking the order as collected and can be adjusted as necessary.

### 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 Lenses**' 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** ★★ Ref:   
 This Examination Record Last Sight Test Rx

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

Optician: R VAU Sph Cyl Axis Add VAA  
 Date: 13/09/2016 11:51 L VAU Sph Cyl Axis Add VAA  
 +1.00 Plano 0.0 1.00 6/5  
 +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		Tint	Colour	Rep. Schedule	Pack Size	Price	
Soft	Spherical					Daily	900	£0.00	
<b>L J&amp;J</b>	<b>1-DAY ACUVUE</b>	8.40	14.20	-3.00					
Type	Design	Design Options		Tint	Colour	Rep. Schedule	Pack Size	Price	
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-Refracton  
 Sph Cyl Axis Add BVD  
 Right Plano 0.00 0.0 0.00 0  
 Left Plano 0.00 0.0 0.00 0

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°

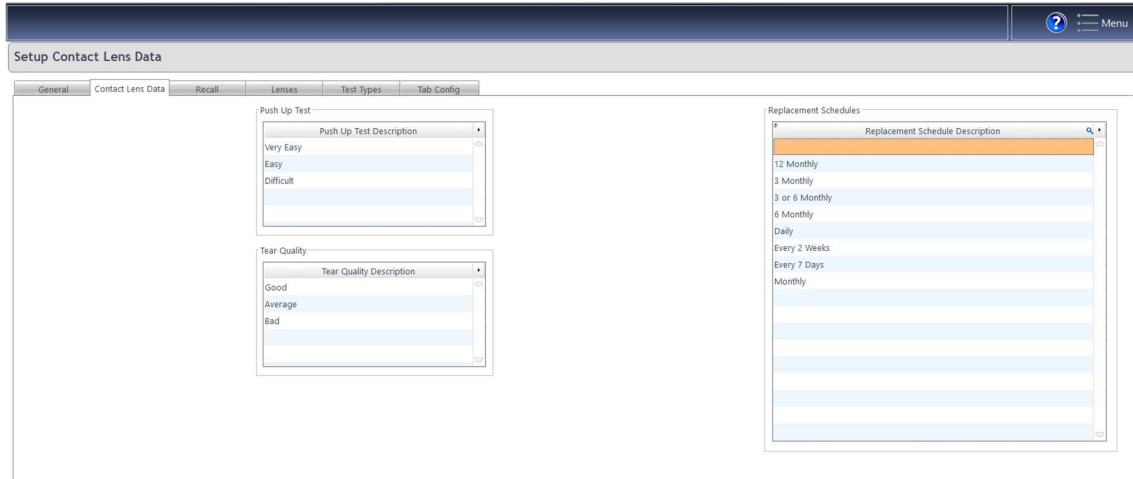
**Final Rx**  
 Sph Cyl Axis Add  
 Right -5.25      Override  
 Left -3.00      Override

## **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.

Branch  
Staff / Roles  
Patients  
Examinations

Clinical  
Contact Lens  
Sight Tests

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)
Medical Assessment	Medical Assessment		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
Aftercare	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

Authorised Staff

Authorise staff to perform this test type. + Authorise Staff

Staff Code	Firstname	Surname
All	Staff	Members

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