Ocelot

Practice Management System

User Guide

Version Release
31 October 2011

Developed and Distributed by Opticare Pty Ltd

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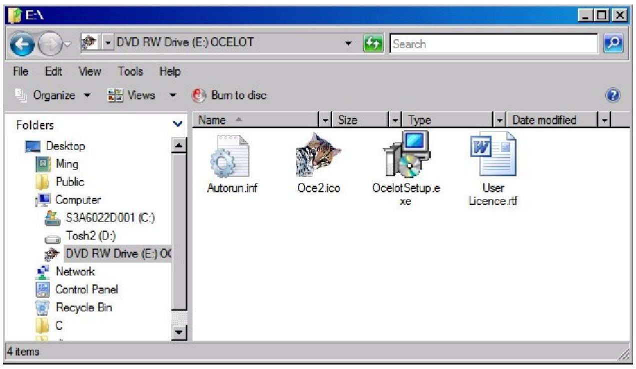
Ocelot Practice Management System – Quick Start User Guide

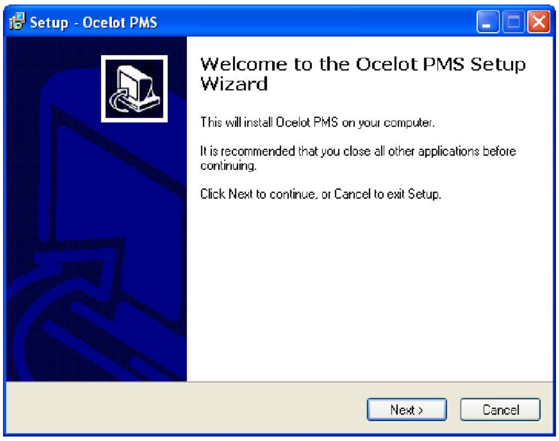
System Requirements
Windows XP, Windows 7
Screen resolution 1024 x 768 or above

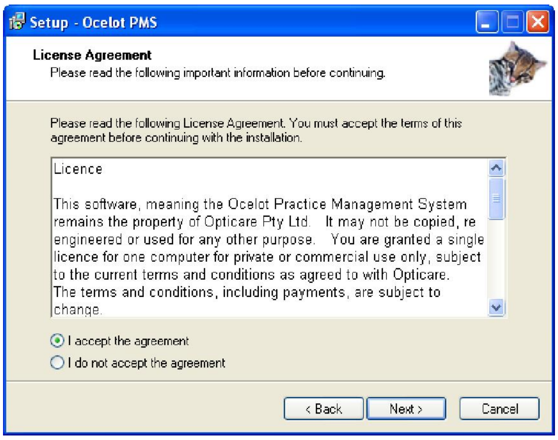
Installation

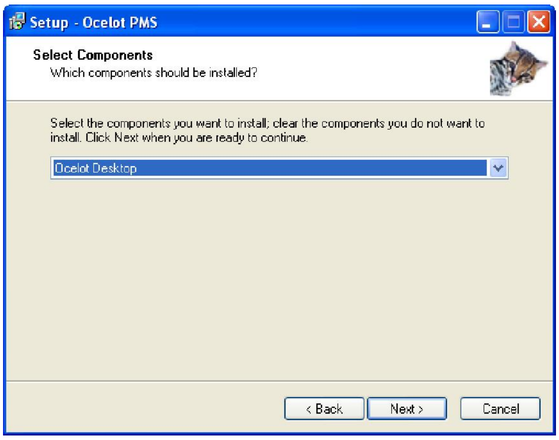
Ocelot Practice Management System is a Microsoft Access® runtime installation designed for use on Windows XP® systems. The system will run on Windows Vista® as a client version or stand alone version, not a server version. Windows XP® and Windows 7® are the supported platform. The system will run as a standalone runtime version without Microsoft Office® and/or Access® installed. The installation should commence automatically after inserting the CD. If not please navigate to CD ROM Drive and double click OcelotSetup.exe to start.

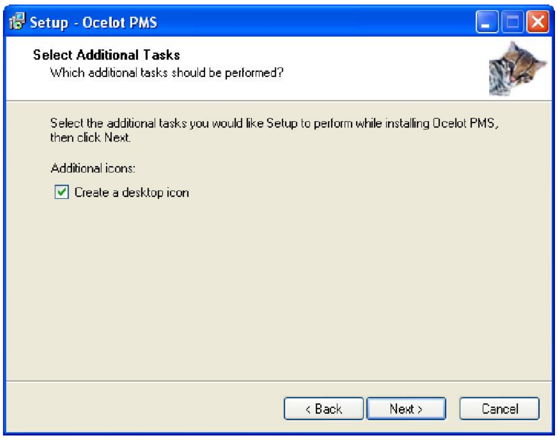


Follow the on screen prompts for a typical installation.









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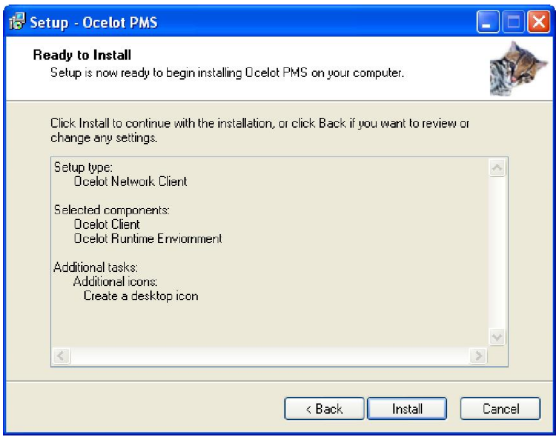
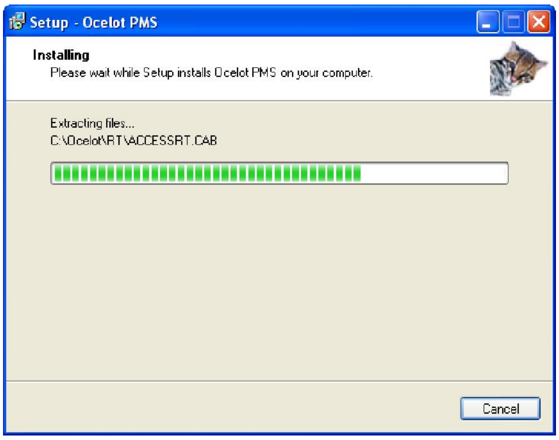
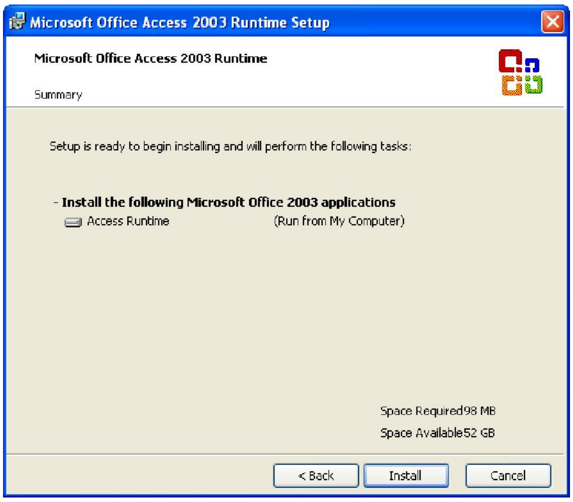
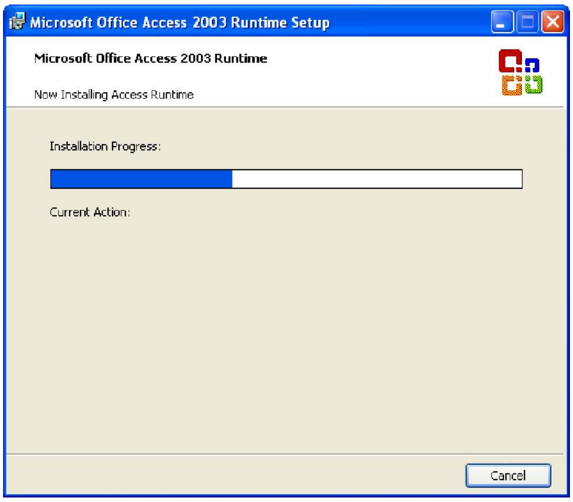
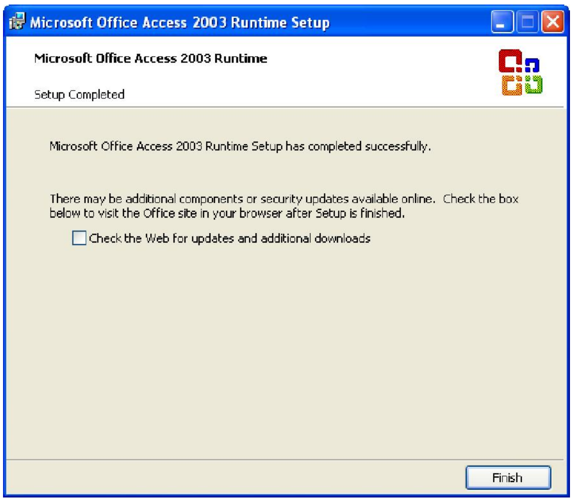


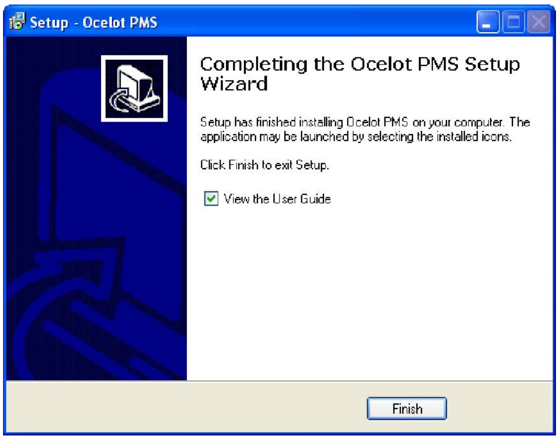


An Access Rumtime Setup program starts automatically if the system didn't have it installed. Click **Install** button to continue.









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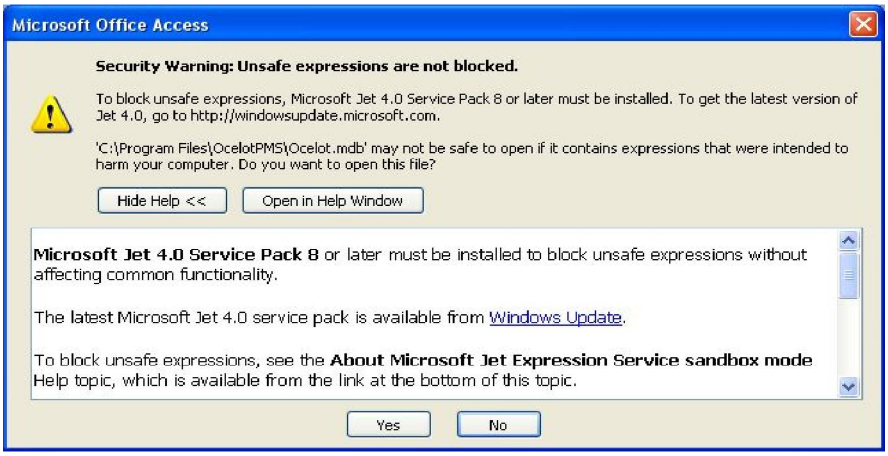
Start Up

Double click the Ocelot icon from the Desktop.

Depending on your system and security settings you may see the following message at start up.

Click the **No** button. Then comes a warning message to ask if you want to open the file or not. Click the **Yes** button.



Click **Open** to continue starting the program.

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The start up screen appears, click **Start Ocelot** to commence using the system.

The first screen that appears after starting the system is the main Practice Management Screen. From here you can navigate to all areas of the system by clicking the appropriate buttons.

Before beginning to use the system some basic set up is required, this includes setting up invoice items, cash sales, practice details and a few other items. Click the **Setup** button to open the Setup form. A login screen will show up and please use **GEORGE** as the password. The procedures for this are detailed on the following pages.

Security

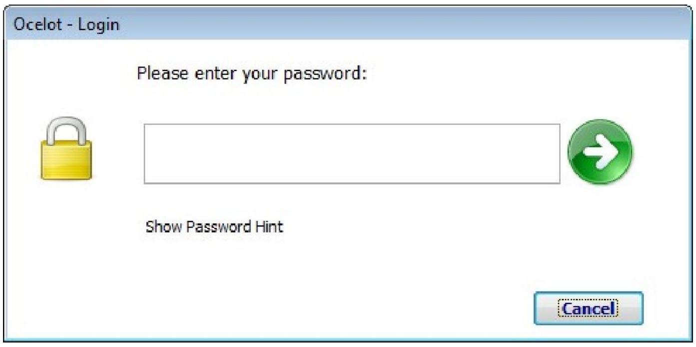
A security password can be set to protect the **Reports** and the **Setup** screens. In **Setup** screen, click **Security** icon to open the **Security** screen. You can set the default login expires time and enable/disable password protection in Ocelot.

Setup New Password

Click the **Set New Password** button in **Security** screen to setup a new password. The default password is **GEORGE**. You can enter a new password together with a password hint which will help you to remember the password during the login screen. Please note there is no way to recover a forgotten password as we use a strong one-way encoding to store the password. A password reset service is available from us.

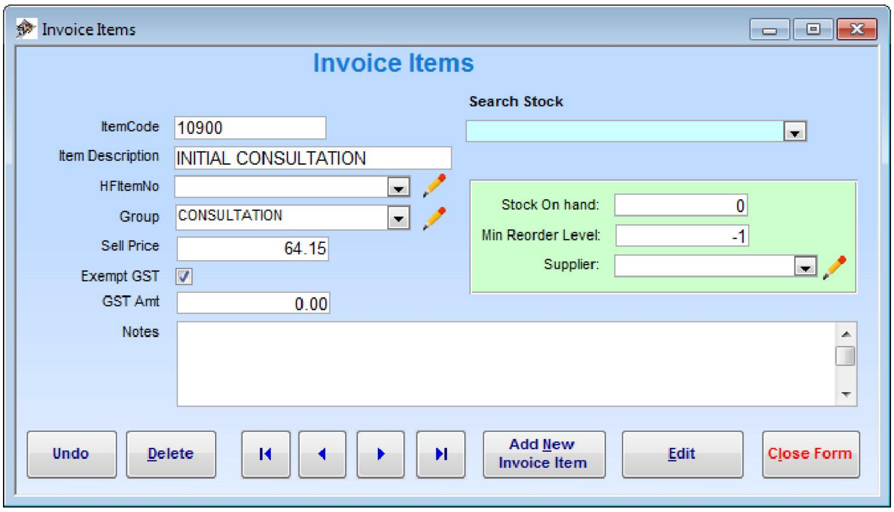
Login

In the login screen, just enter your password and click the green **login** button. If you forgot your password, click the **Show Password Hint** text. Your preset password hint will show up. If you still have trouble remembering your password, please contact us to reset the password for you.



Invoice Items

Next click on the **Invoice Items** button to open the Invoice Items form.



You will find a few example items already entered, you can either delete these or change the details to suit your own requirements.

To add new items click the **Add New Invoice Item** button. Enter all the required details. You can scan a barcode label as the Item Code enabling you to scan for the same item when invoicing later. Allocate your item to a group for later reports. *(You can also click on the* ***Edit Group or HF Item Code button*** *to check and edit details of Groups or Health Fund item numbers).* IMPORTANT – When entering the **Sell Price** the GST amount will be calculated based on the GST Rate set in the **Practice Detail** form; or you can change the GST amount manually; tick Exempt GST if GST doesn't apply. The data entered here is called for the invoicing details in Patient Billing.

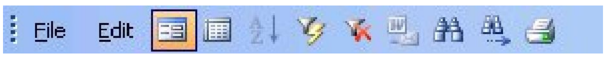
The **Search Stock** field is a drop down field that allows you to scroll the entered items and select an item. You can also scan a barcode label instead or enter the code allocated to the item.

The stock info area only available when you enable the Stock Control functions in System Configuration screen. For more detail about stock control please refer to the stock control section in this document.

NB: When you see the record navigation buttons at the bottom of the form you can use it to scroll records but do not use it to create a new record, always use the "Add New (Type of record)" button at the bottom of the form.

The functions are detailed below.

First Record  Previous Record  Next Record  Last record 

The Menu and Toolbar 

The Print Icon button 

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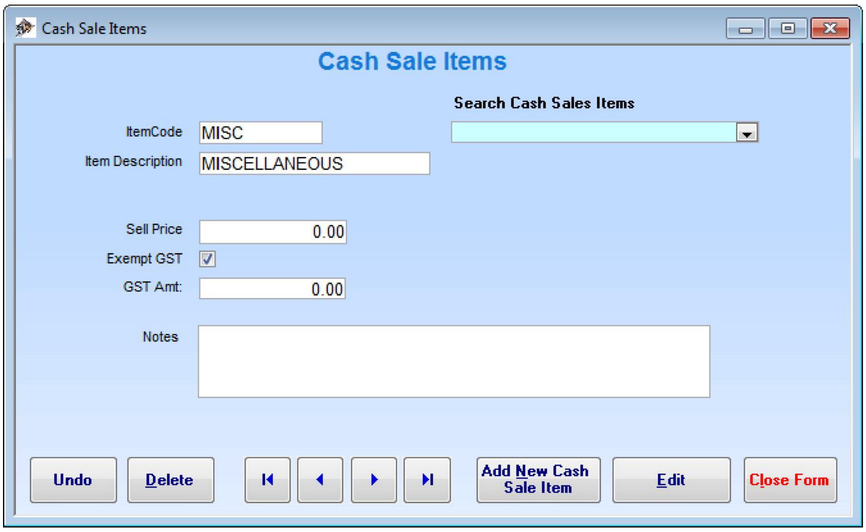
Cash Sale Items

Next click on the **Cash Sale Items** button to open the Cash Sale Items form.

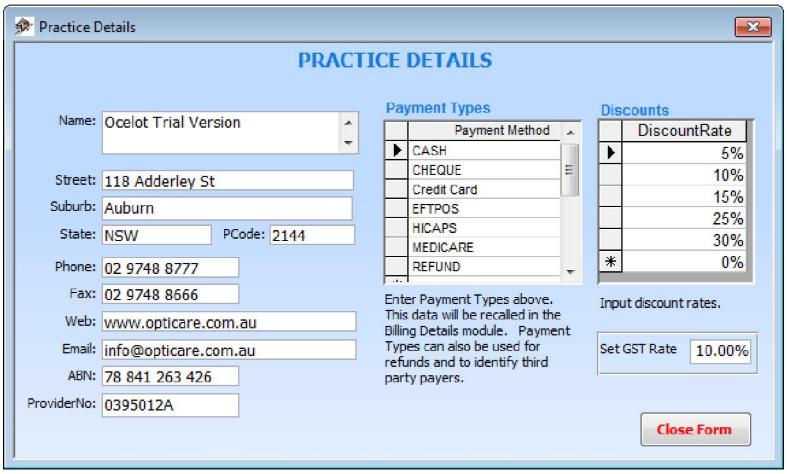


You will find a miscellaneous item already entered, you can either delete it or change the details to suit your own requirements.

To add new items click the **Add New Cash Sales Item** button. Enter all the required details. If GST is applicable – **untick** the Exempt GST box. You can scan a barcode label as the Item Code enabling you to scan for the same item when invoicing later. The data entered here is called for the Cash Sales Billing.

Practice Details

Enter your practice and any additional payment details and if necessary edit discount details. The GST Rate is the default rate to calculate GST amount when you change **Sell Price** for Invoice Items. Tab off each field to save the data when changed.

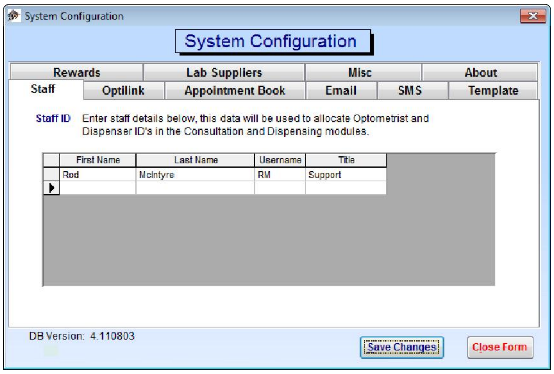


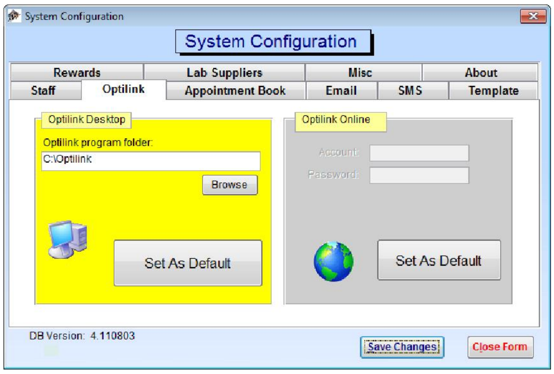
System Configuration

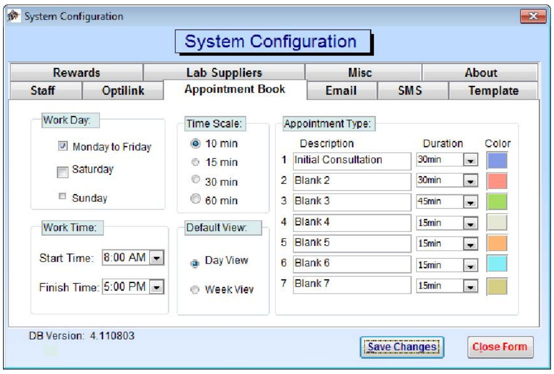
System consists of nine configuration screens as detailed below.

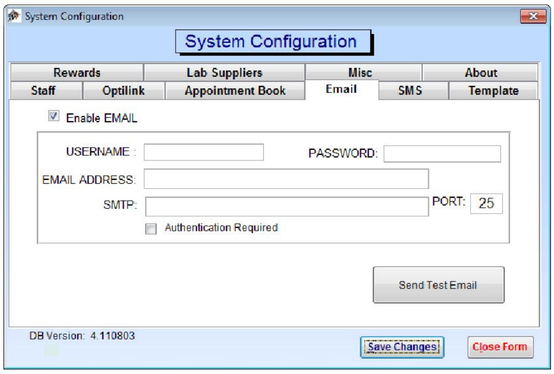
For Staff ID's which will be selected in your forms.

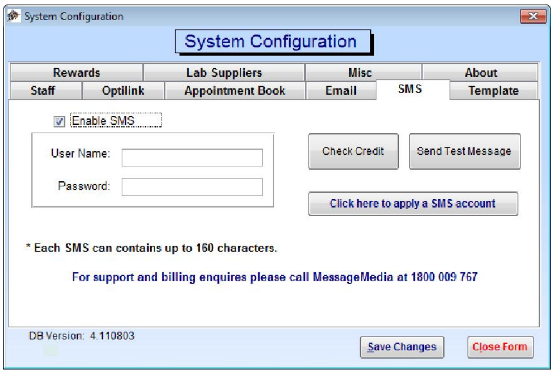
1. Is for the Optilink Desktop folder location and/or Optilink Online Account detail (for Optilink users only).
2. Is for appointment book settings.
3. Is for Email (if you wish to use Email functions.)
4. Is for SMS (if you wish to use SMS functions. Separate account needs to be applied.)
5. Is for Templates for Email and SMS.
6. Is for display installed lab suppliers information.
7. Is for setup Occupations, Interest, Recall settings, and Action screen behaviors.
8. Is for setup Reward Points.
9. Is for setup Stock Control.
10. Is for register and display registration details.

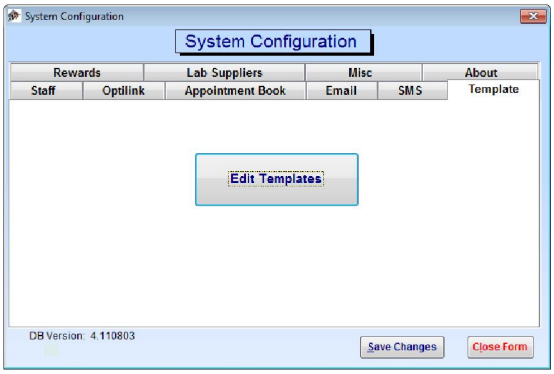


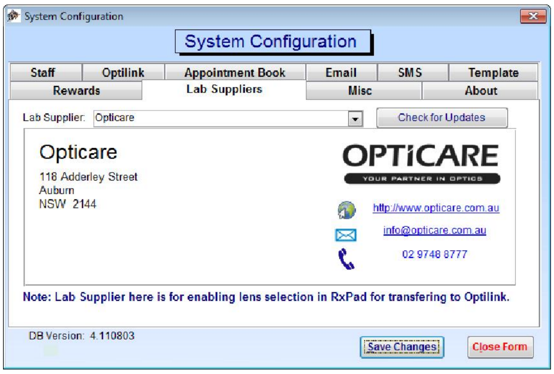


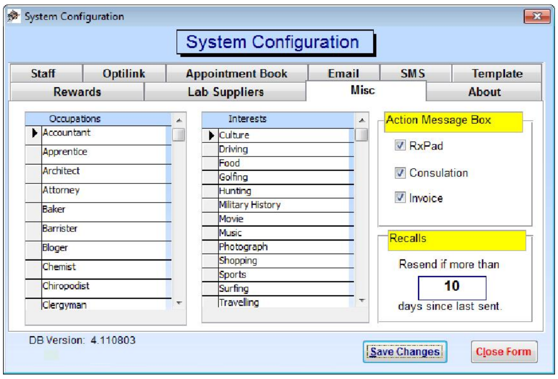


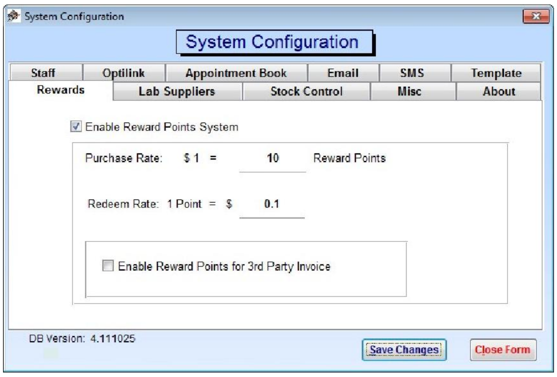


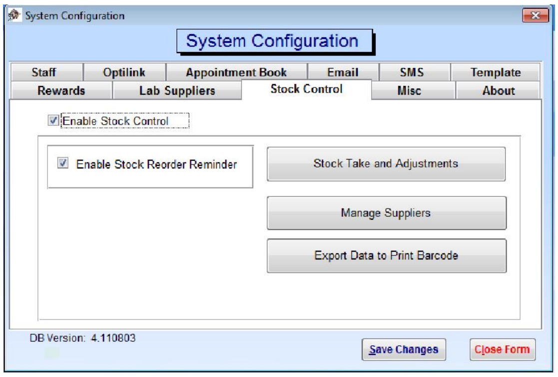


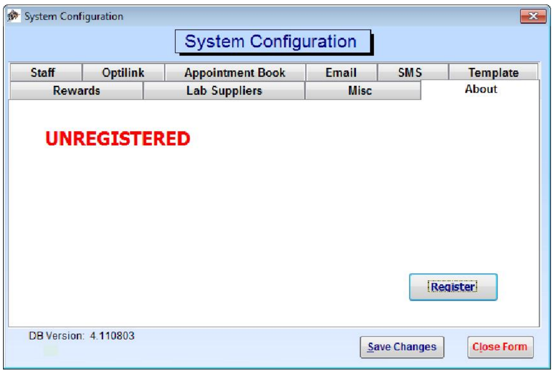




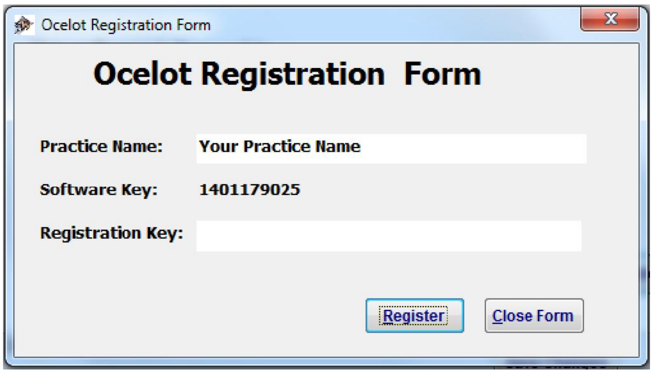








Clicking the **About** tab accesses the registration form. After arranging registration you click the register button to complete the process and enter your licence key. **NB: Offsite registrations need to be arranged by appointment – Phone Opticare Sydney on 1800 251 852 to arrange a time.**

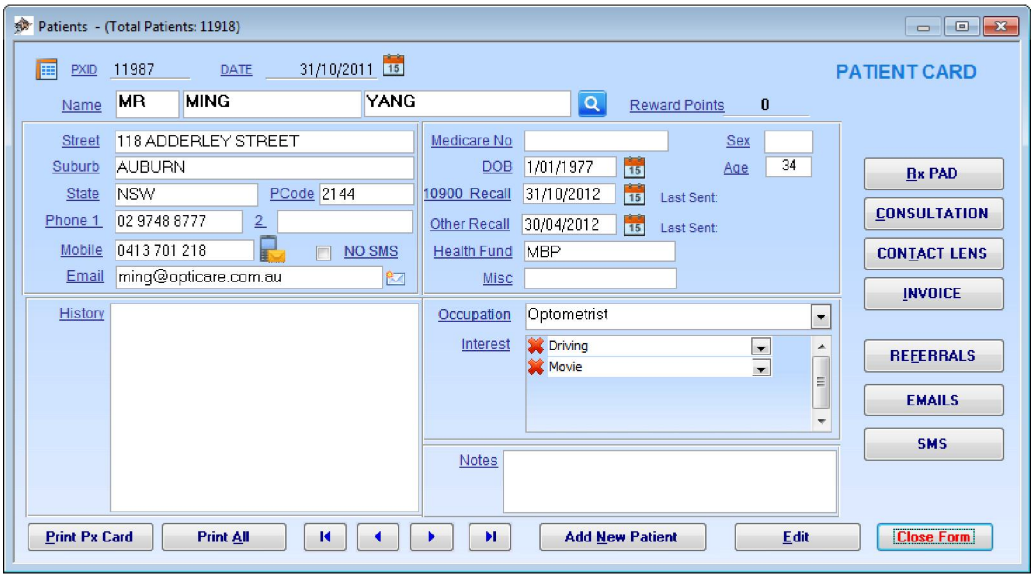


Shortcut Key Commands and Printing information

Shortcut Key Commands

Some users prefer to use “Shortcut Key” commands instead of a mouse. With Ocelot, Shortcut Keys are available in most modules. To use a Shortcut Key you hold the *Alt* key while pressing the underlined character, this performs the same function as clicking on the command button with the mouse.

In the **Patient Card** module (shown below) *Alt + N* is the same as clicking the **Add New Patient** command button. *Alt + R* is the same as clicking the **Rx PAD** command button etc. If you take note of the underlined characters on each form you can use them as Shortcut Keys.



Form Printing Information

Patients:

Print Px Card - If your printer is setup to print 6x4 index cards

Print All – Prints the patient details. The printout is set to A4 paper.

RxPad

Print Jobcard - Prints the jobcard form. The printout is set to A5 paper.

Consult

Print Detail - Prints the patient consultation details. The printout is set to A5 paper.

Print Rx - Prints the prescription details for the patient. The printout is set to A5 paper.

Contact Lens

Print CL Order - Prints the contact lens order. The printout is set to A5 paper.

Print CL Rx - Prints the Contact Lens prescription details. The printout is set to A5 paper.

Invoice

Print Invoice - Prints the Invoice/receipt. The Printout is set to A5 paper. A4 paper if 3rd party biller is selected.

Print Receipt - Prints the receipts for part payments for lay-by, deposits etc. The printouts are set to A5 paper. . A4 paper if 3rd party biller is selected.

Cash Sale

Print Receipt - Prints the cash sale receipt. The printouts are set to A5 paper.

Report Printing Information

Payments Received By Type - The printout is set to A4 paper.

Payments Received Summary - The printout is set to A4 paper.

Sales Summary - The printout is set to A4 paper.

Sales By Item - The printout is set to A4 paper.

Banking Summary with Payment Type - The printout is set to A4 paper.

Cash Sales Summary - The printout is set to A4 paper

Cash Sales Banking Summary - The printout is set to A4 paper

Outstanding Balances - The printout is set to A4 paper

Patient Summary - The printout is set to A4 paper

3rd Party Biller Report - The printout is set to A4 paper

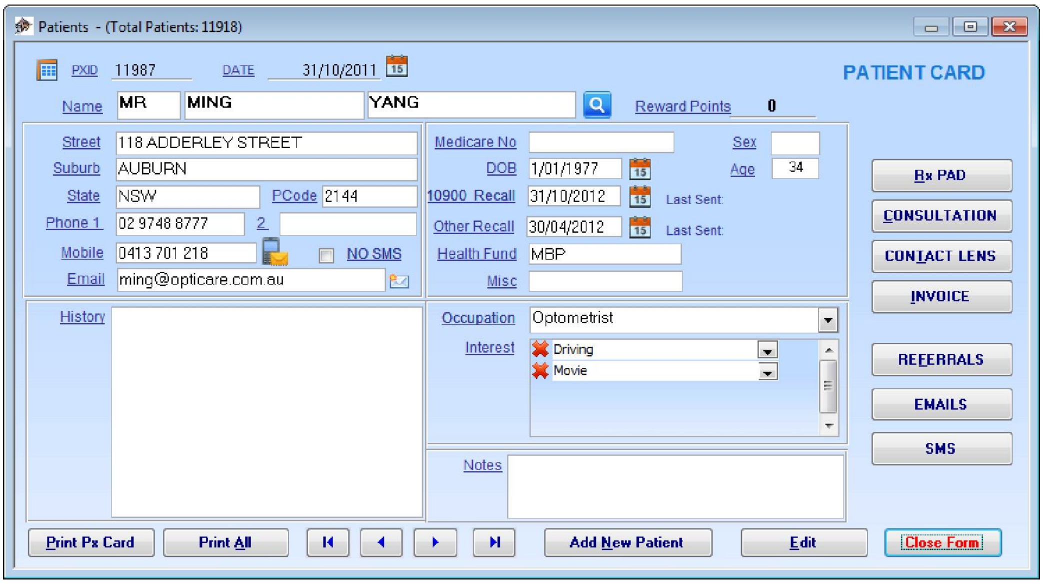
Process 10900 Recall Letters - The printout can be set to A4 or A5 paper.

10900 Recall Labels – The printout is set to Avery J8160 63.5mm x 38.1mm labels – A4 Sheets.

Process Other Recalls - The printout can be set to A4 or A5 paper.

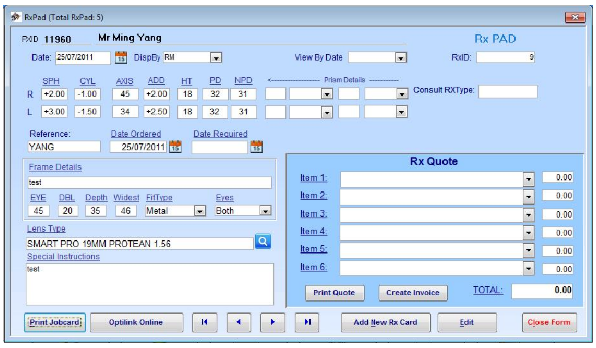
Using Ocelot

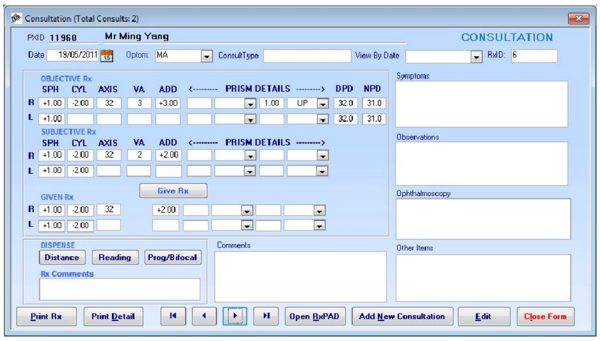
From the Ocelot main screen click the **Patient** button. The Patients Form will open, here you can enter the patient details and recall date. Most work will be done from the Patient Card from which you can navigate to the Rx Pad, Consultation, Contact Lens, Invoice *(Patient Billing),* and Referrals forms.

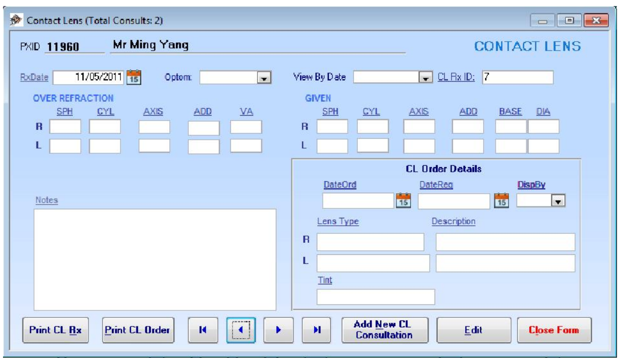


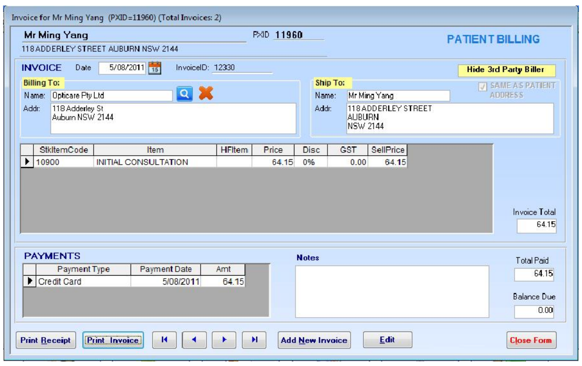
To enter a new patient click the **Add New Patient** button, the date will automatically default to the current date, this can be edited if required. Enter the required details in the patient's card and click the **Update** button to save the data, if you need to edit the data at a later date you will need to click the **Edit** button to go into edit mode, then update again to save the changes. Note that the date for the **10900 Recall** field should be two years from the last consultation date. After updating the data you can navigate direct to any of the other forms to continue entering the patient's information.

Below are the other forms accessed from the patient card, we will cover each one on the following pages.









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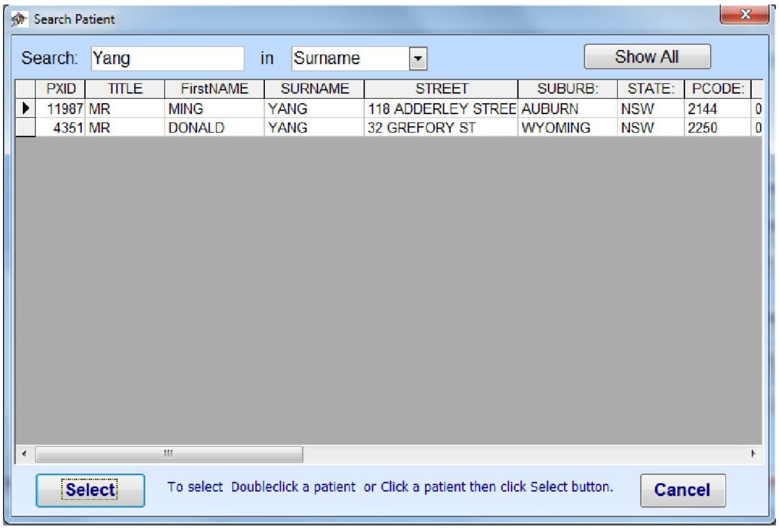
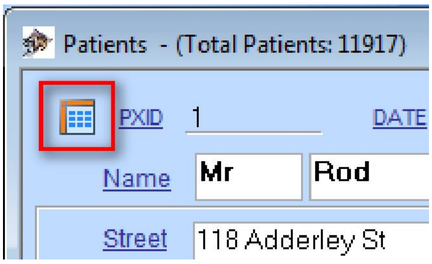
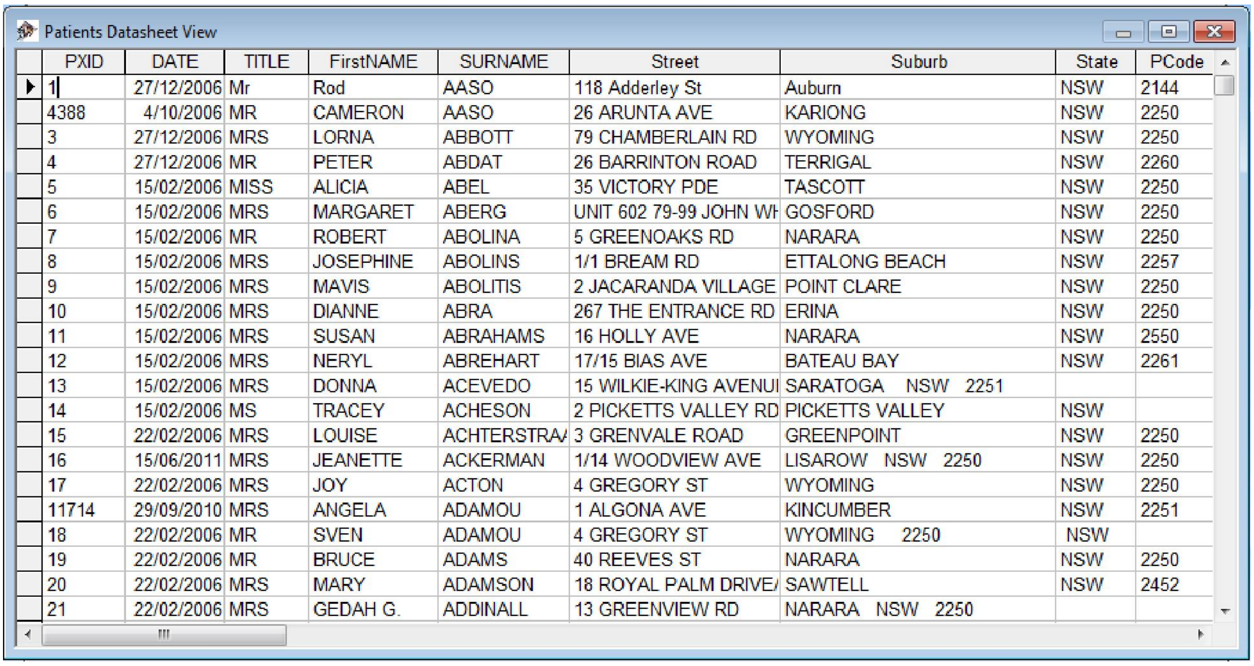
When you have many records entered you can click the search button next to patient last name to bring up a search screen. In the **Patient Search** screen enter the search criteria, click the patient and click Select button or just double click the patient.



Also you can view patients in datasheet view by clicking the datasheet view button on the left of the PXID.



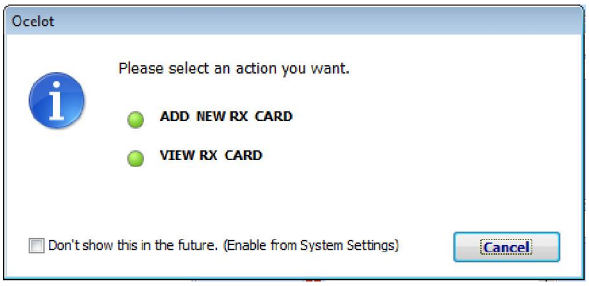

Patients Datasheet View

PXID	DATE	TITLE	FirstNAME	SURNAME	Street	Suburb	State	PCode
1	27/12/2006	Mr	Rod	AASO	118 Adderley St	Auburn	NSW	2144
4388	4/10/2006	MR	CAMERON	AASO	26 ARUNTA AVE	KARIONG	NSW	2250
3	27/12/2006	MRS	LORNA	ABBOTT	79 CHAMBERLAIN RD	WYOMING	NSW	2250
4	27/12/2006	MR	PETER	ABDAT	26 BARRINTON ROAD	TERRIGAL	NSW	2260
5	15/02/2006	MISS	ALICIA	ABEL	35 VICTORY PDE	TASCOTT	NSW	2250
6	15/02/2006	MRS	MARGARET	ABERG	UNIT 602 79-99 JOHN WH	GOSFORD	NSW	2250
7	15/02/2006	MR	ROBERT	ABOLINA	5 GREENOAKS RD	NARARA	NSW	2250
8	15/02/2006	MRS	JOSEPHINE	ABOLINS	1/1 BREAM RD	ETTALONG BEACH	NSW	2257
9	15/02/2006	MRS	MAVIS	ABOLITIS	2 JACARANDA VILLAGE	POINT CLARE	NSW	2250
10	15/02/2006	MRS	DIANNE	ABRA	267 THE ENTRANCE RD	ERINA	NSW	2250
11	15/02/2006	MRS	SUSAN	ABRAHAMS	16 HOLLY AVE	NARARA	NSW	2550
12	15/02/2006	MRS	NERYL	ABREHART	17/15 BIAS AVE	BATEAU BAY	NSW	2261
13	15/02/2006	MRS	DONNA	ACEVEDO	15 WILKIE-KING AVENUI	SARATOGA NSW 2251		
14	15/02/2006	MS	TRACEY	ACHESON	2 PICKETTS VALLEY RD	PICKETTS VALLEY	NSW	
15	22/02/2006	MRS	LOUISE	ACHTERSTRA/	3 GRENVALE ROAD	GREENPOINT	NSW	2250
16	15/06/2011	MRS	JEANETTE	ACKERMAN	1/14 WOODVIEW AVE	LISAROW NSW 2250	NSW	2250
17	22/02/2006	MRS	JOY	ACTON	4 GREGORY ST	WYOMING	NSW	2250
11714	29/09/2010	MRS	ANGELA	ADAMOU	1 ALGONA AVE	KINCUMBER	NSW	2251
18	22/02/2006	MR	SVEN	ADAMOU	4 GREGORY ST	WYOMING 2250	NSW	
19	22/02/2006	MR	BRUCE	ADAMS	40 REEVES ST	NARARA	NSW	2250
20	22/02/2006	MRS	MARY	ADAMSON	18 ROYAL PALM DRIVE/	SAWTELL	NSW	2452
21	22/02/2006	MRS	GEDAH G.	ADDINALL	13 GREENVIEW RD	NARARA NSW 2250		

Print Px Card - If your printer is setup to print 6x4 index cards you have the option of printing a card with the basic patient detail. **Print All** – Prints all patient detail to an A4 page.

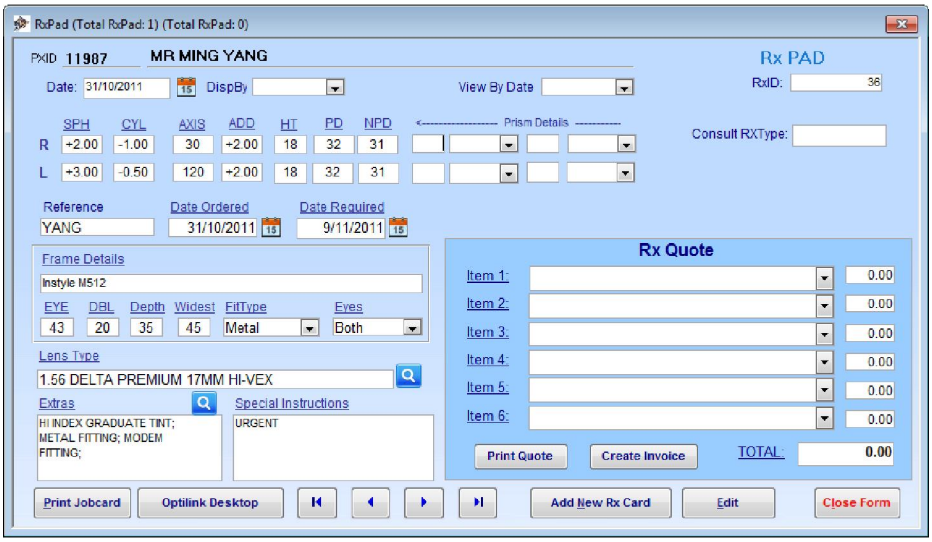
Rx PAD

To navigate to the **Rx PAD** click the Rx PAD button on the Patient Card. An action message window will show up allows you to choose your action- **ADD NEW RX CARD** or **VIEW RX CARD**. This action message window can be enabled/disabled in **System Settings** form **MISC** tab.



After navigating to the Rx PAD form from the Patient Card it will open the form belonging to the patient. If this is the first Rx PAD entry for the patient the fields will be blank awaiting new details (eg. RxID: (AutoNumber)), if it is not the first entry the details of the last Rx will be shown.

Click the **Add New Rx Card** button to create a new Rx record. The date will automatically default to the current date, this can be edited if required, you must select **Disp By** *(dispensed by)*, and an RxID will be automatically allocated. You can then enter the rest of the required information – simple tab *(or click)* and type. If you already have an Rx PAD record entered you click the **Add New Rx Card** button to create a new Rx record.



You can view Rx PAD forms by the date entered by selecting the **View By Date** drop down field and selecting the required date.

You can also enter details to provide a quotation for the job and print the quote if required. These details can be used to automatically create an invoice if desired by clicking the **Create Invoice** button.

Always update any entries and changes with the **Update** button. Editing is the same process as detailed for Patients.

You can select Lab Supplier's lens or extras by clicking the  search button next to Lens Type or Extras.

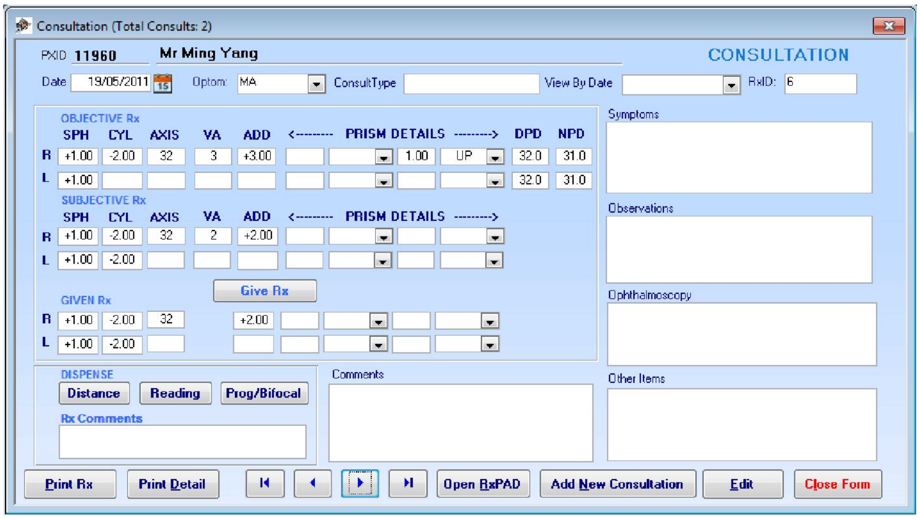
Selecting **Print Jobcard** previews the jobcard form, if you are happy with the detail you can then print the form by clicking the print icon on the toolbar *(or selecting File – Print from the File menu)* for forwarding to the laboratory or processing internally. NB: The printout is set to A5 paper.

Selecting **Optilink Desktop** or **Optilink Online** transfers job data to Optilink.

CONSULTATION

To navigate to the **CONSULTATION** form click the CONSULTATION button on the PATIENT CARD. After navigating to the CONSULTATION form from the PATIENT CARD it will open the form belonging to the patient. If this is the first consultation entry for the patient the fields will be blank awaiting new details, if not the details of the last consultation will be shown.

Click the **Add New Consultation** button to create a new Consultation record. The date will automatically default to the current date, this can be edited if required, you must select **Optom** and a consultation RxID will be automatically allocated. You can then enter the rest of the required information – simple tab *(or click)* and type.



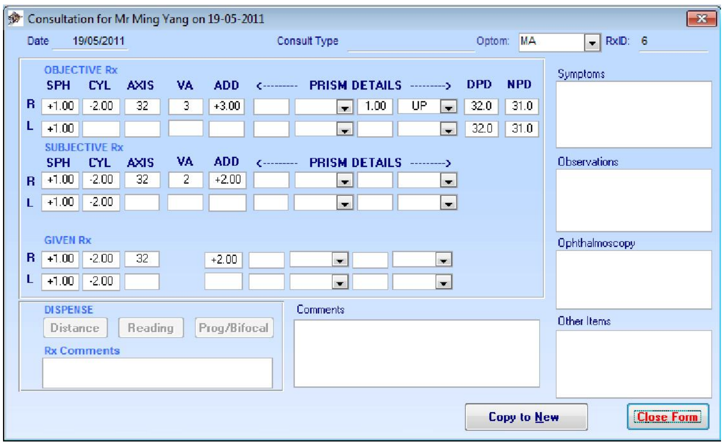
If you already have a consultation record entered you click the **Add New Consultation** button to create a new consultation record.

You can enter an OBJECTIVE Rx if required, the PD detail then do a subjective Rx. After entering a SUBJECTIVE Rx it can be transferred to the GIVEN Rx by clicking the **Give Rx** button, any details requiring alteration can then be made in the GIVEN Rx fields. After updating the data the GIVEN Rx details can be transferred to the Rx PAD as distance and/or reading or multifocal.

Always update any entries and changes with the **Edit/Update** button.

You can view current patient's Rx PAD forms by clicking the **Open RxPad** button. This saves you time instead of close this form then go to Rx PAD forms from the **Patients** screen.

You can view consultation forms (will open in another screen) by the date entered by selecting the **View By Date** drop down field and selecting the required date. You can create a new consultation by click **Copy To New** button. It will copy Subjective RX and Given RX information across.



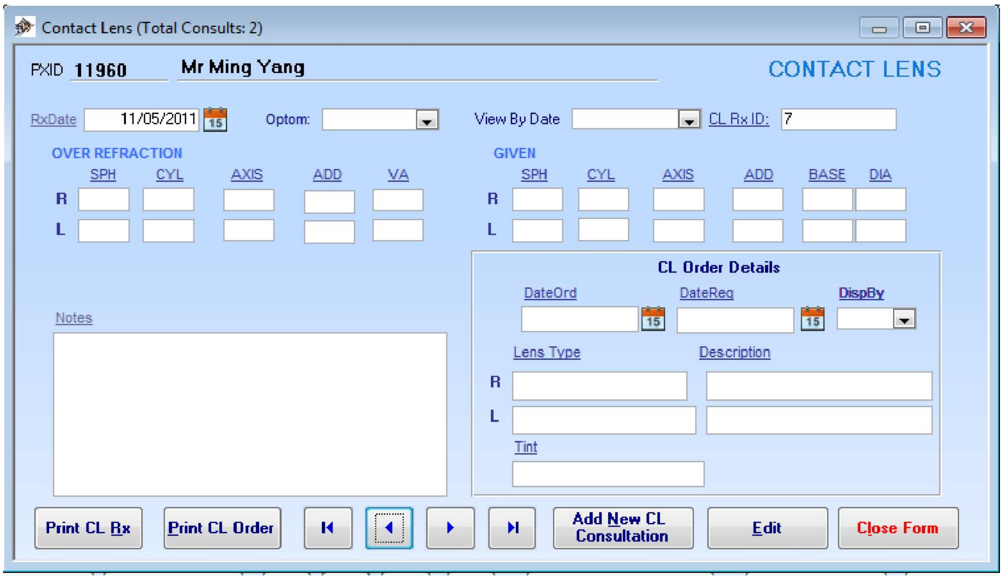
Print Rx - previews the prescription details print for issuing to the patient. This print includes the Rx comments. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NB: The printout is set to A5 paper.

Print Detail - previews the patient consult details print prior to printing a hardcopy record if required. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NB: The printout is set to A5 paper.

CONTACT LENS

You can navigate to the **CONTACT LENS** form from the PATIENT CARD or directly from the CONSULTATION form, it will open the form belonging to the patient. The CONTACT LENS form is a combined consultation and dispensing form **CL Rx / DISP**. If this is the first consultation entry for the patient the fields will be blank awaiting new details, if not the details of the last consultation will be shown.

Click the **Add New CL Consultation** button to create a new CL Consultation record. The date will automatically default to the current date, this can be edited if required, you must select **Optom** and a consultation CL RxID will be automatically allocated. You can then enter the rest of the required information – simple tab *(or click)* and type.



If you already have a consultation record entered you click the **Add New CL Consultation** button to create a new consultation record.

You can view consultation forms by the date entered by selecting the **View By Date** drop down field and selecting the required date.

After entering OVER REFRACTION details they can be transferred to the GIVEN details by clicking the **Give Rx** button, any details requiring alteration can then be made in the GIVEN fields

Always update any entries and changes with the **Edit/Update** button.

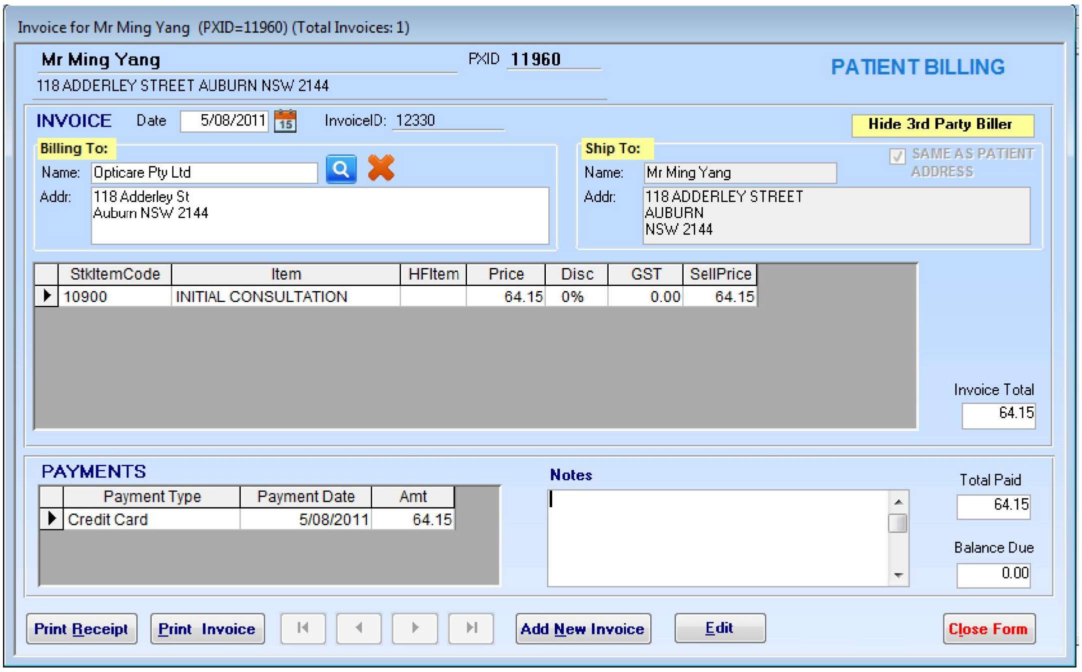
Selecting **Print CL Order** previews the contact lens order. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* The form can then be faxed to your supplier. NB: The printout is set to A5 paper.

Selecting **Print CL Rx** previews the prescription details print for issuing to the patient. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NB: The printout is set to A5 paper.

PATIENT BILLING

To navigate to the **PATIENT BILLING** form click the INVOICE button on the PATIENT CARD. After navigating to the PATIENT BILLING form from the PATIENT CARD it will open the form belonging to the patient. If this is the first billing entry for the patient the fields will be blank awaiting new details, if not the details of the billing entry will be shown.

Click the **Add New Invoice** button to create a new Invoice record. The date will automatically default to the current date, this can be edited if required, and an InvoiceID will be automatically allocated. You can then enter the rest of the required information – simple tab *(or click)* and type.



The invoice area allows you to choose sale items from a drop down combo in the Stock Item field, you can either select from the drop down or enter the stock ID code or scan from a barcode label. Barcode labels will only work if you have scanned the barcode into the Item Code field when entering invoice items.

All fields can be edited and the GST will be automatically recalculated if required. Invoices can also be deleted via the file menu.

Always update any entries and changes with the **Edit/Update** button.

Print Invoice

Selecting **Print Invoice** previews the Invoice/receipt. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).*

NB: The printouts are set to A5 paper.

Print Receipt

The print receipt function allows for receipting part payments for lay-by, deposits etc. The Invoice/Receipt can be printed after full payment has been received.

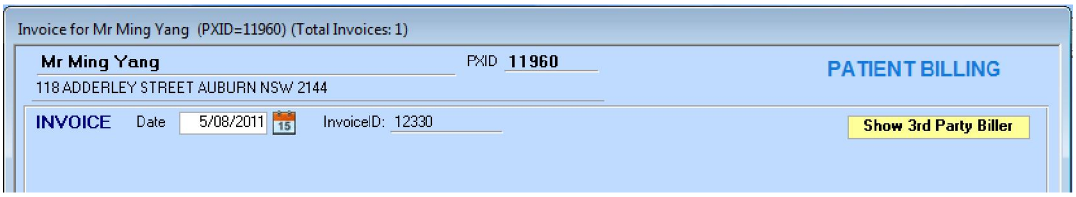
Selecting **Print Receipt** previews the receipt. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).*

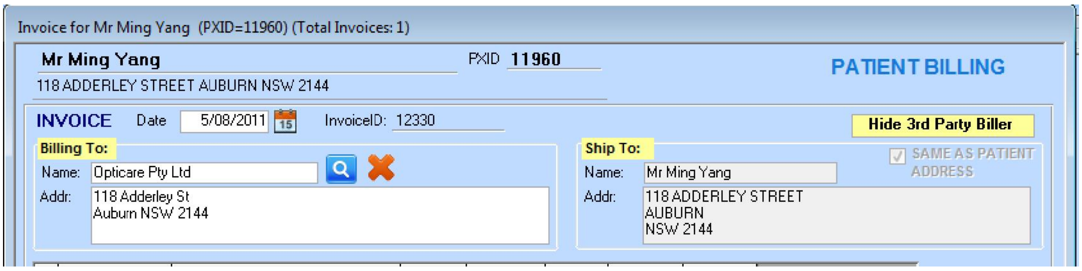
NB: The printouts are set to A5 paper.

3rd PARTY BILLER

To use 3rd Party Biller, click **Show 3rd Party Biller** button in **Invoice** screen. Then click the **Search Biller** icon to find the correct biller. To clear Biller please click the **Clear Biller** icon.

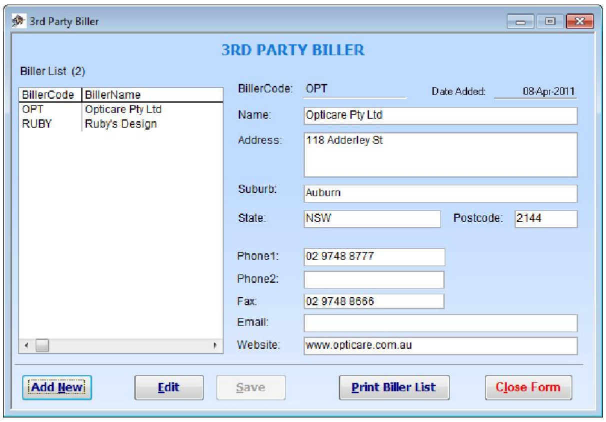
NB: Click the Hide 3rd Party Biller button will not clear the biller info.





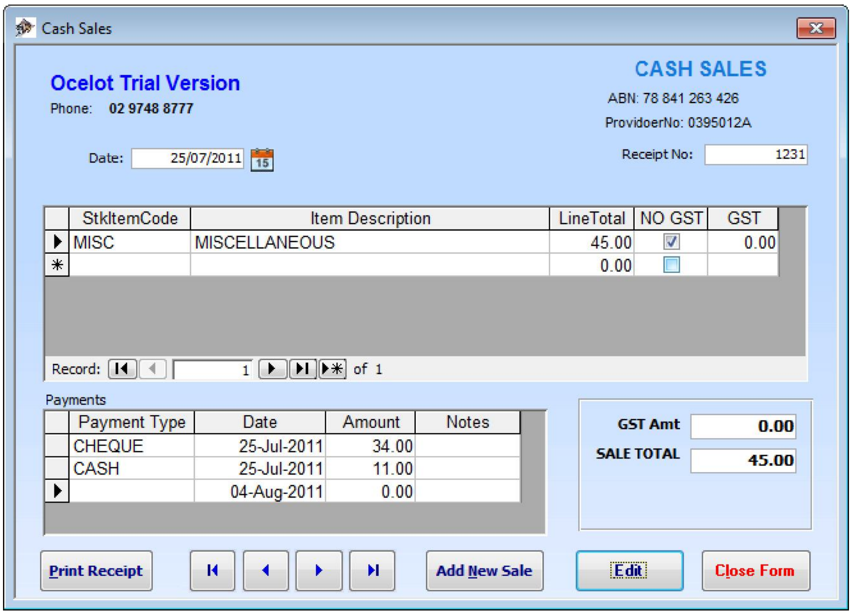
Note: if a 3rd party is selected the Invoice and Receipt printout is set to A4 paper instead of A5 paper.

To edit 3rd Party Biller click the **3rd Party Biller** button in the **Setup** screen and do it there.



CASH SALES

The CASH SALES form is accessed from the main screen by clicking the Cash Sales button.



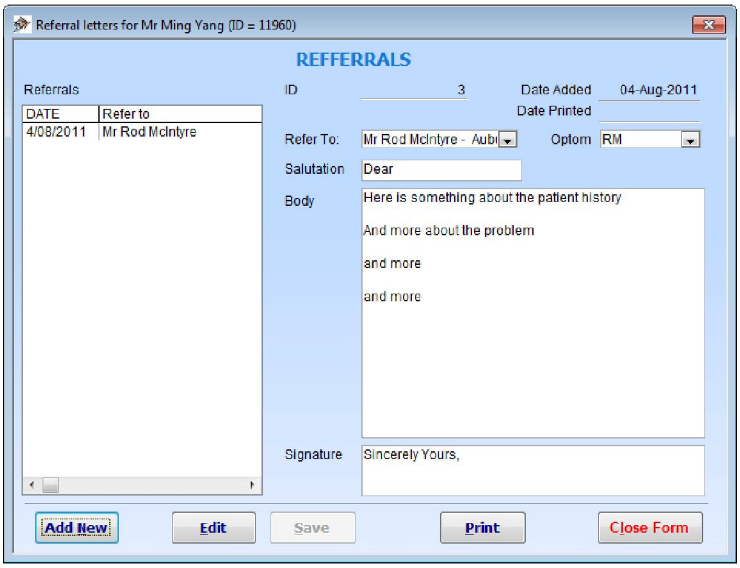
To create a new **Cash Sale** the first thing you must do is click the **Add New Sale** button, the **Date** details and **Receipt No** will be automatically allocated after doing this. You can then enter the rest of the required information. The CASH SALES can also accept freehand data if you wish to modify default data, just tab *(or click)* and type whatever detail you wish. GST is allocated by default, if an unusual occurrence arises and you are selling an item where GST does not apply click the **NO GST** checkbox and the GST will not be charged.

To reverse a cash sale enter details such as "Sale Cancelled" and enter a minus amount, or simply delete the record. If you reverse the detail a record will be kept, if you delete the record no record is kept and when you print a Cash Sales Summary the record number will be missing. Records can also be edited later if required.

Selecting **Print Receipt** previews the receipt details prior to printout. If you are happy with the detail you can then print the form by clicking the print icon *(or selecting File – Print from the File menu).* NB: The printout is set to A5 paper.

REFERRAL LETTER

To navigate to the **REFERRAL** form click the REFERRALS button on the PATIENT CARD. After navigating to the REFERRALS form from the PATIENT CARD it will open the form belonging to the patient. If this is the first referral entry for the patient the fields will be blank awaiting new details, if not the details of the last referral will be shown.

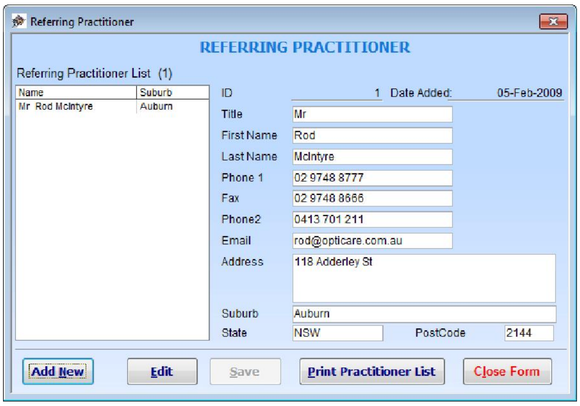


If it is the first entry the date will automatically default to the current date, this can be edited if required, you must select the **Refer To** and **Optom** details, and a referral ID will be automatically allocated. You can then enter the rest of the required information – simple tab (or click) and type.

If you already have a referral letter record entered you click the **Add New** button to create a new one.

Always update any entries and changes with the **Edit /Save** button.

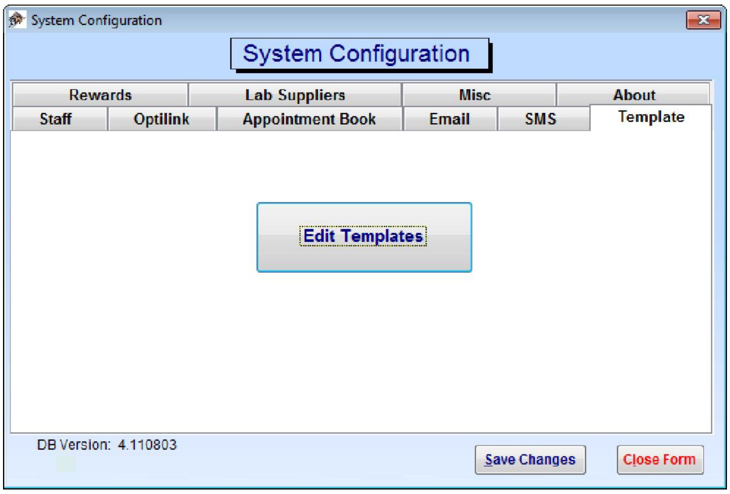
To edit practitioners in **Refer To** selection click the **Referring Practitioner** button in the **Setup** form and do it there.



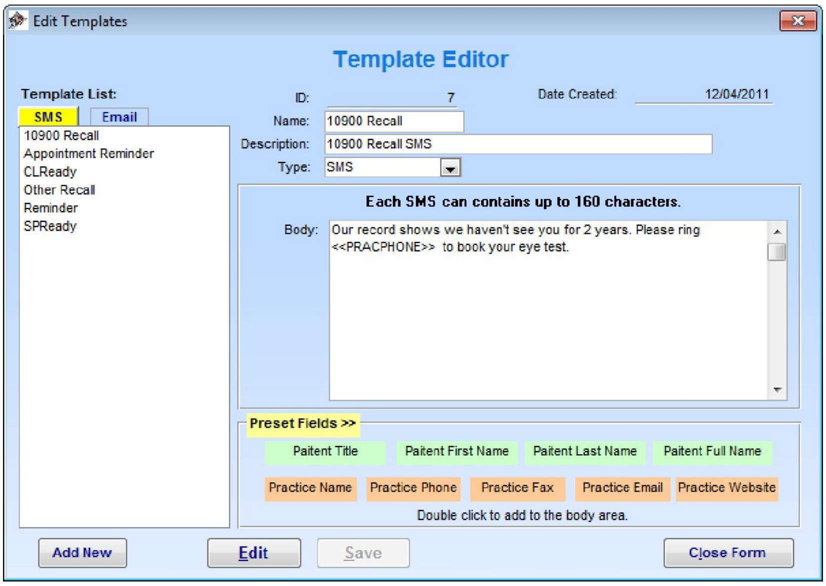
You can print Referring Practitioner list by click the **Print Practitioner List** button at the bottom of the form.

TEMPLATES

Templates are used for sending Email and SMS. In **System Configuration** screen, click **Template** tab. Tick **Edit Templates** button and **Template Editor** screen will show up.



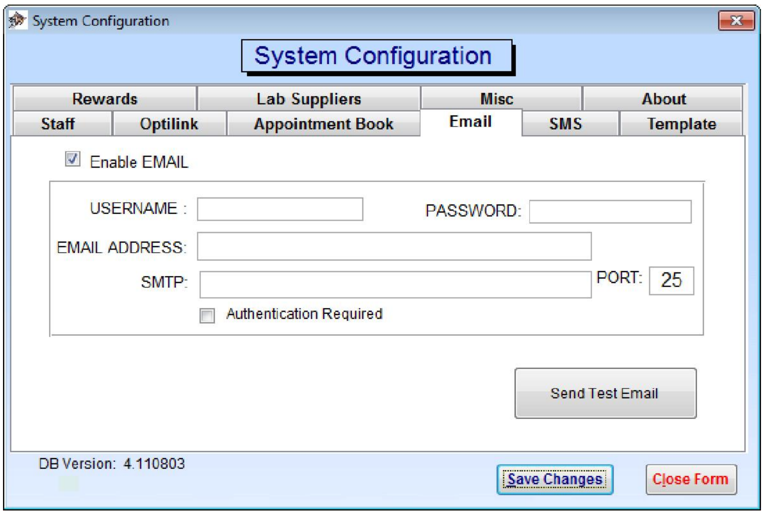
Click SMS or Email tab above the list on the left hand side to switch templates. Preset Fields is an easier way to add customized information to the template.



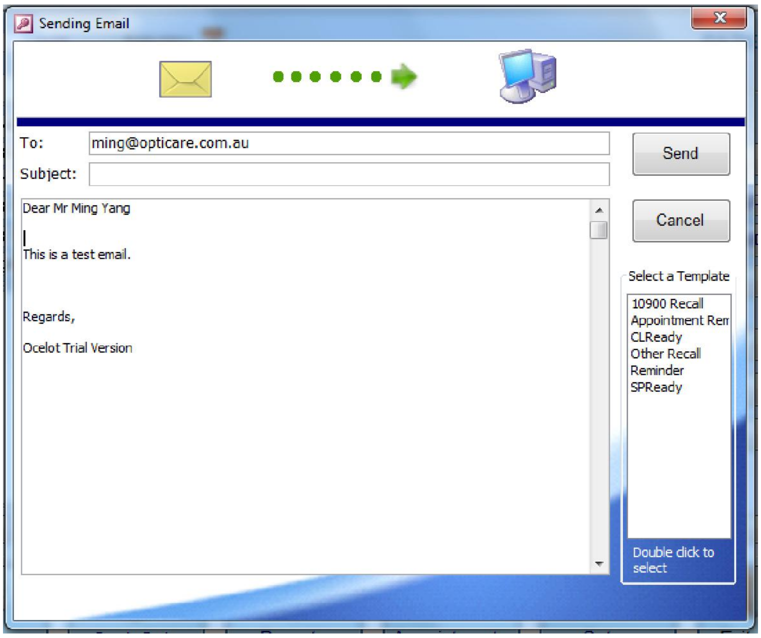
EMAIL FUNCTIONS

SETUP EMAIL

In **System Configuration** screen, click **Email** tab. Tick **Enable Email** option and fill in your email account details.



Sending One-off EMAIL – (Connection to the Internet must be established)



1. Open the **Patients** screen and find the patient you want sent to.
2. Click on the  icon next to the **Email** field.
3. Enter your message or select from a template, then click **Send** button.
4. An Email success prompt will show up once the email has been sent. Otherwise an error will tell you what you need to do.

Sending Appointment Reminder EMAIL

1. In the **Appointment** screen, click the patient you want to send reminder to.

2. Click the Email icon in the patient info area.
3. Enter your message or select from a template, then click **Send** button.

Sending Batch Appointment Reminder EMAIL

1. In the **Appointment** screen, click the Email icon from the **Appointment Toolbar**.
2. Select the **Appointment Start Date** and **Appointment Stop Date**.
3. Modify your message if you need to.
4. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
5. A sent report will be generated and the system will ask you if you want to view the report or not.

Sending Recall EMAIL

1. In Reports screen, click the By Email button in the 10900 Recall area or Other Recall area.
2. Select the **Start Date** and **Stop Date**.
3. Modify your message if you need to.
4. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
5. A sent report will be generated and the system will ask you if you want to view the report or not.

Sending Reward Points Marketing EMAIL

1. In Reports screen, click the **Send Reminder By Email** button in the Reward Points area.
2. Modify your message if you need to.
3. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
4. A sent report will be generated and the system will ask you if you want to view the report or not.

View EMAIL

1. Open the **Patients** screen and find the patient you want to view email results.
2. Click **Email** button and a **View Email** screen will show.

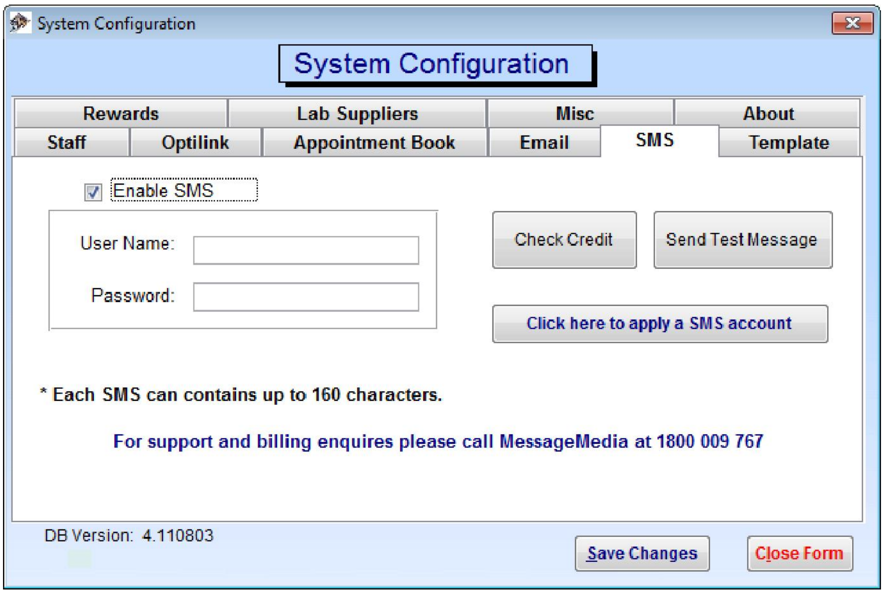
View EMAIL Sending Log

1. Open Windows Explorer and navigate to C:\Ocelot\Log folder. All Email sending logs are there with sending date as part of the file name.

SMS FUNCTIONS

SETUP SMS

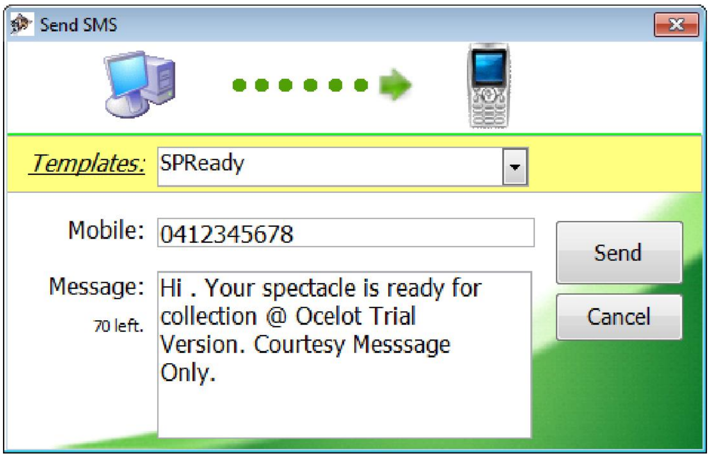
In **System Configuration** screen, click **SMS** tab. Tick **Enable SMS** option and fill in your SMS settings.



If you don't already have a SMS account, you can setup your SMS account by registering online at the Opticare website: http://www.opticare.com.au/Ocelot.htm . The pricing information can also be found at this web site. Once you have registered, you will receive a user name and password which you will need to enter in here.

Sending One-off SMS – (Connection to the Internet must be established)

Note: A fee applies for each SMS sent. Refer to the account application form from Opticare website.



1. Open the **Patients** screen and find the patient you want sent to.
2. Click on the  icon next to the **Mobile Phone** field.
3. Enter your message or select from a template, then click **Send** button.
4. A SMS success prompt will show up with the remaining credits in your account once the SMS has been sent. Otherwise an error will tell you what you need to do.

Sending Appointment Reminder SMS

1. In the **Appointment** screen, click the patient you want to send reminder to.
2. Click the SMS icon in the patient info area.
3. Enter your message or select from a template, then click **Send** button.

Sending Batch Appointment Reminder SMS

1. In the **Appointment** screen, click the SMS icon from the **Appointment Toolbar**.
2. Select the **Appointment Start Date** and **Appointment Stop Date**.
3. Modify your message if you need to.
4. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
5. A sent report will be generated and the system will ask you if you want to view the report or not.

* You can check the sent result for each message by clicking the **SMS** button from the Patients screen.

Sending Recall SMS

1. In Reports screen, click the **By SMS** button in the 10900 Recall area or Other Recall area.
2. . Select the **Start Date** and **Stop Date**.
3. Modify your message if you need to.
4. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
5. A sent report will be generated and the system will ask you if you want to view the report or not.

Sending Reward Points Marketing SMS

1. In Reports screen, click the **Send Reminder By SMS** button in the Reward Points area.
2. Modify your message if you need to.
3. Click Send button. The system will generate the patient list with appointments in selected date range and send individual message to them.
4. A sent report will be generated and the system will ask you if you want to view the report or not.

View SMS

1. Open the **Patients** screen and find the patient you want to check SMS results.
2. Click **SMS** button and a **View SMS** screen will show.

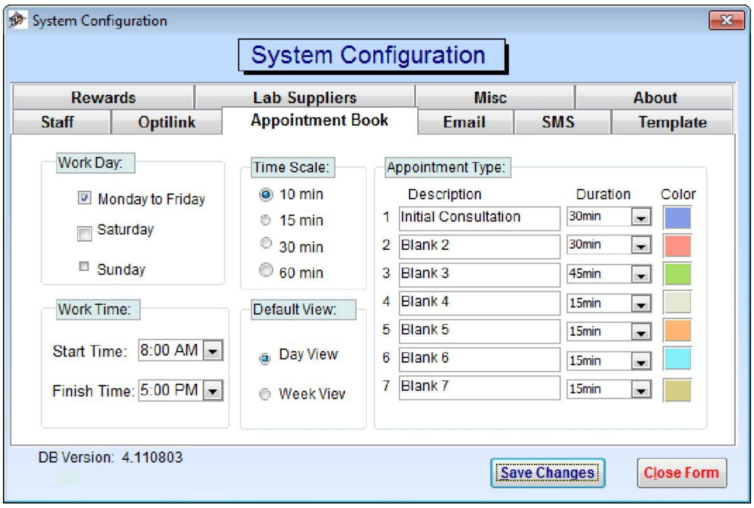
View SMS Sending Log

1. Open Windows Explorer and navigate to C:\Ocelot\Log folder. All SMS sending logs are there with sending date as part of the file name.

APPOINTMENT BOOK

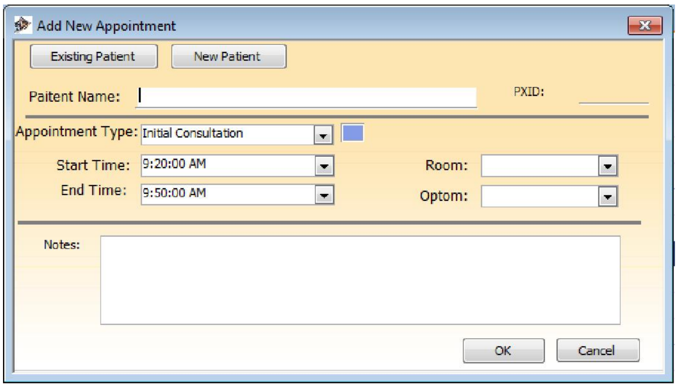
SETUP APPOINTEMNT BOOK

In **System Configuration** screen, click **Appointment Book** tab.



Add new Appointment

In **Appointments** screen, double click on a select date time range. An **Add New Appointment** screen popup. Click **Existing Patient** to find a patient or click **New Patient** to add a new one. Select Appointment Type. Then Room, Optom if you have more than one. Then click **OK** button to add.



Edit an Appointment

Select an appointment, double click to open **Edit Appointment** screen. Alternatively if you just want to change appointment type, room, or optom, just click on the icon from the tool bar at the top of the **Appointments** screen. You can also click **F2** key on the keyboard to do a quick edit of the appointment subject.

Room **Optom** **Appointment Type**

Delete an Appointment

Select an appointment, press **DEL** key on the keyboard.

Reschedule an Appointment

Select an appointment, then click and drag it to the new date/time.

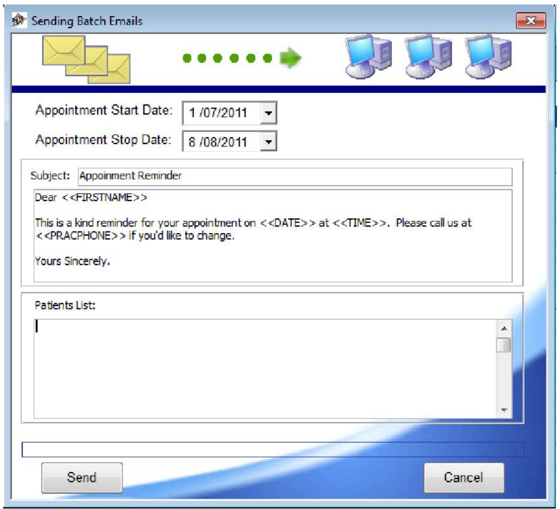
Change Appointment Status

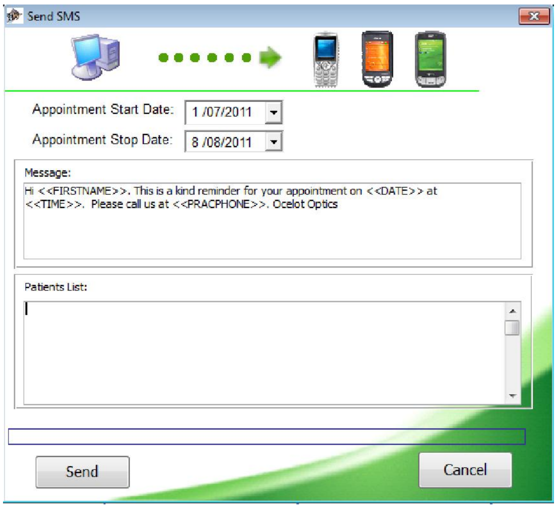
Click the one of the status icon to indicate the patient's status.

Appointment Status

Send Batch Reminders

Click  Email icon or  SMS icon from the top tool bar and follow the prompts.



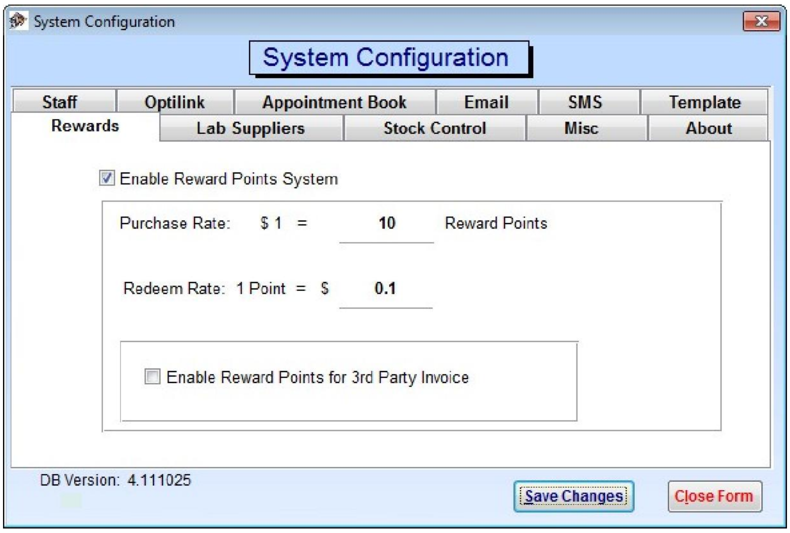


Send Patient Email, SMS or Open Patient Card

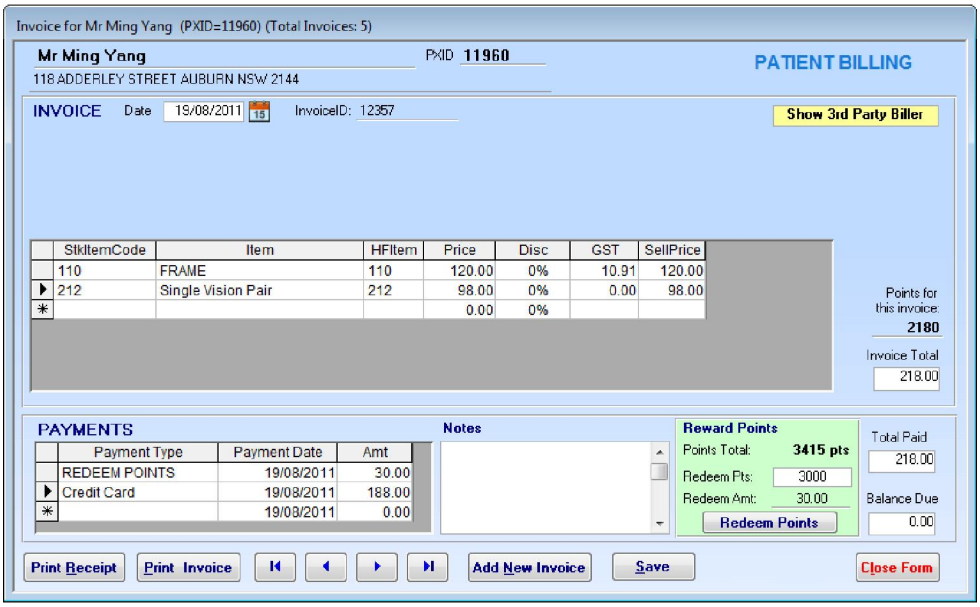
Select an appointment, click on one of the icons you want. Some icons may not appear if the patient's relevant information is not available.

REWARD POINTS

In **System Configuration** screen, click **Rewards** tab you can enable/disable reward points system, setup reward rates, and enable/disable reward points for 3rd party invoices.

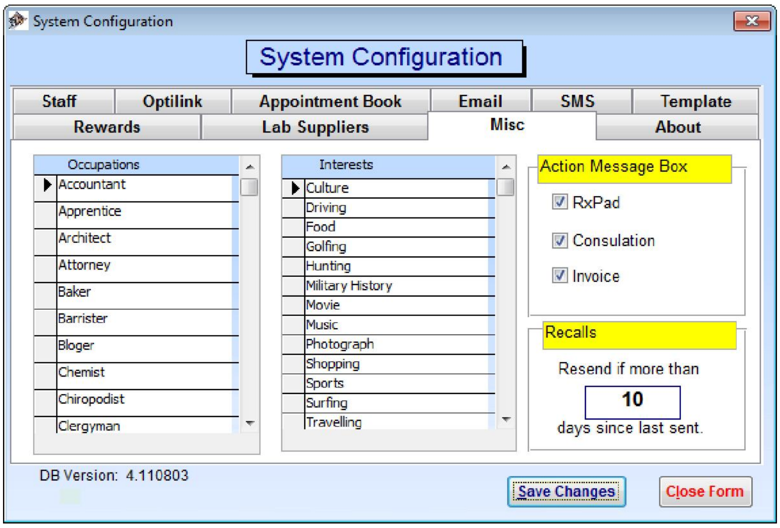


In **Invoice** screen, when reward points system is enabled, reward points are calculated each time an invoice item is selected and price is updated. The reward points won't be counted towards patient's total points until the invoice is fully paid. To redeem points enter points wants to redeem and click **Redeem Points** button.



RECALLS

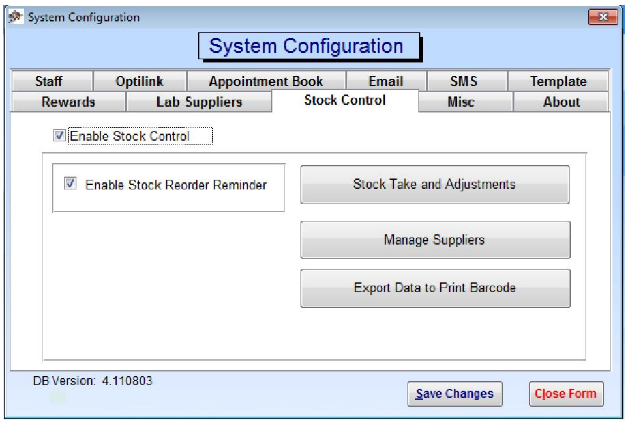
In **System Configuration** screen, click **Misc** tab you can set resend recall period. This allows you to resend any recalls to patients who haven't visited you since the last one was sent. It also gives you the ability to send just one recall (either via SMS, Email or Letter) to a patient in a limited period and minimize your running cost as well as maximize your practice exposure to your customers.

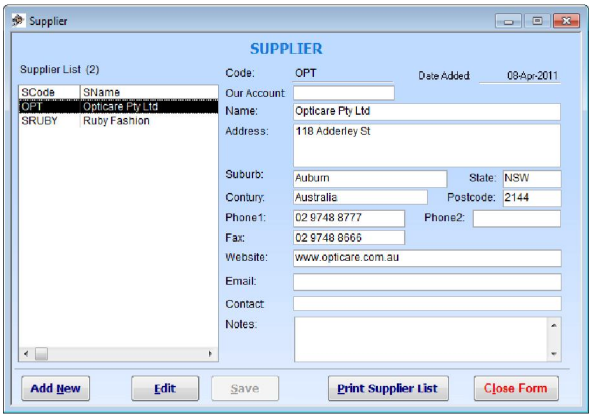


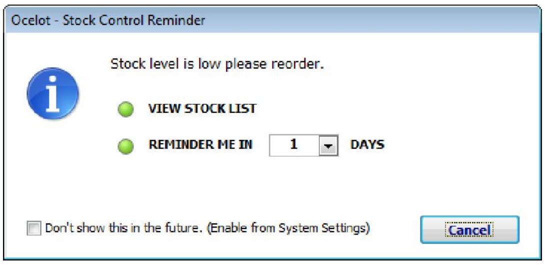
You can send recalls from **Reports** screen and view last recall sent information from **Patients** screen.

STOCK CONTROL

In **System Configuration** screen, click **Stock Control** tab you can enable/disable Stock Control function in Ocelot, setup reminder, manage supplier and export data for printing barcodes.

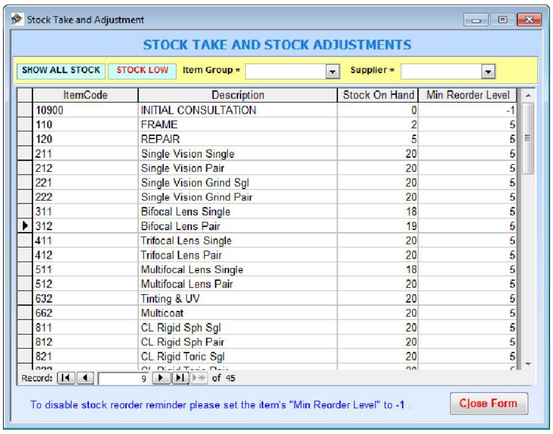


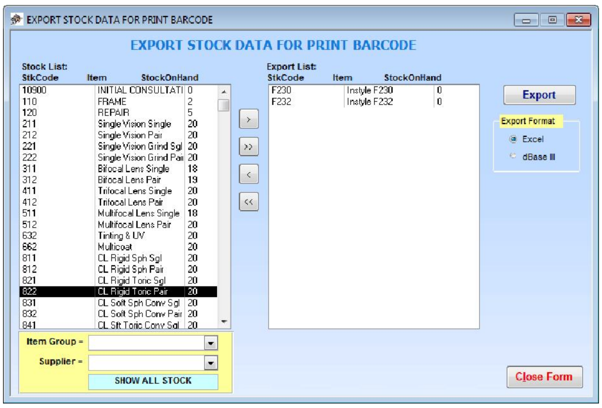




Stock Take and Print Stock Barcode

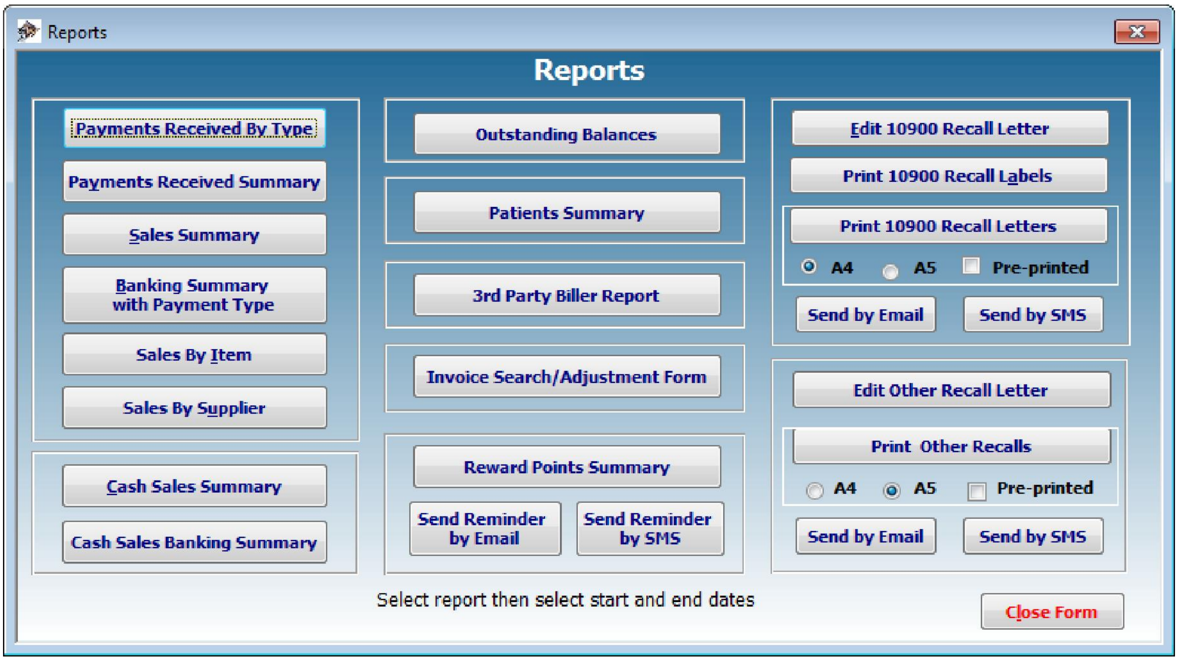
To disable stock reorder reminder in Invoice screen, you can set the item's "Min Reorder Level" to -1 in **Stock Take and Stock Adjustment** screen. Export stock data for print barcode function is provide for print barcode in any barcode program suits your needs. For more information about barcode in Ocelot please refer to the Barcoding section in this Guide or visit our website at www.opticare.com.au/Ocelot.htm





REPORTS

Reports are accessed from the main screen by clicking the **Reports** button. After opening the Reports screen you can access reports for Payments Received By Type, Payments Received Summary, Sales Summary, Banking Summary with Payment Type, Sales By Item, Sales by Supplier, Cash Sales Summary, Cash Sales Banking Summary, Outstanding Balances, Patients Summary, 3rd Party Biller Report, Reward Points Summary, Edit Recall Letters, Print Recalls and Recall Labels. Most reports are included GST figures.

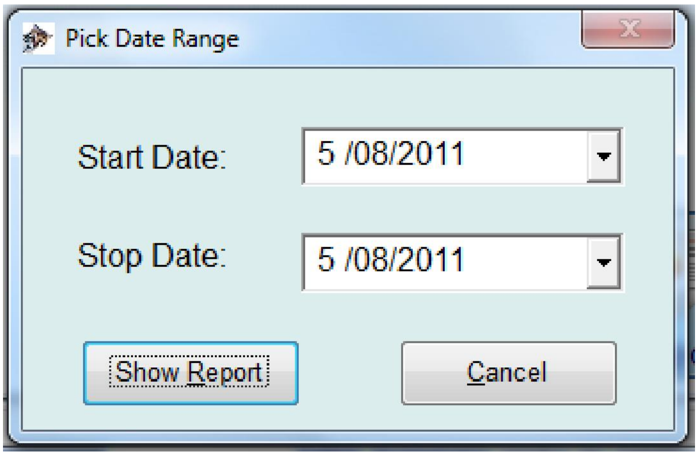


The **Edit 10900 Recall Letter** function allows you to type in the date, content and signature line for your 10900 patient recall letters reports, **10900 Recall Letters** compiles the 10900 Recalls and presents the letters report for preview prior to printing.

The **Edit Other Recall Letter** function allows you to type in the date, content and signature line for your other patient recall letters reports, **Other Recalls** compiles the Other Recalls and presents the letters report for preview prior to printing.

All reports except the Edit 10900 Recall Letter and Edit Other Recall Letter function will present you with a pop up calendar box to select the date ranges, simply select the dates required to run the report.

A report will then be compiled collecting the information between these dates.



Payments Received By Type works as mentioned above and presents a report of payments received between the chosen dates by type of payment. NB: The printout is set to A4 paper.

Payments Received Summary works as mentioned above and presents a summary report of payments received. NB: The printout is set to A4 paper.

Sales Summary works as mentioned above and presents a report of invoiced items between the chosen dates summarised with a sales and GST total for the selected period. NB: The printout is set to A4 paper.

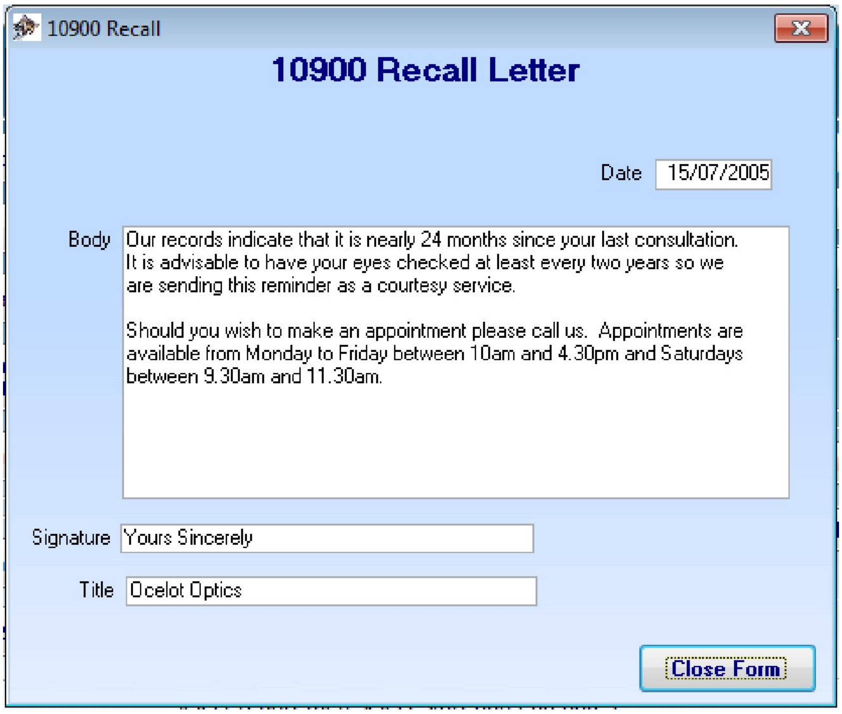
Sales By Item works as mentioned above and presents a report of grouped invoiced items between the chosen dates summarised with a sales and GST total for the selected period. NB: The printout is set to A4 paper.

Banking Summary with Payment Type works as mentioned above and presents a report of invoices between the chosen dates summarised with payments received. NB: The printout is set to A4 paper.

Cash Sales Summary also works as mentioned above and presents a report of all cash sales between the chosen dates summarised with a sales and GST total for the selected period. NB: The printout is set to A4 paper

Patients Summary works as mentioned above and presents a report of patient summarised with latest payment, invoice, and consultation information. NB: The printout is set to A4 paper.

Edit 10900 Recall Letter
When you click the **Edit 10900 Recall Letter** button you are presented with a screen to edit the recall letter content.



Type in the date for the letter, your content and signature line. This becomes the content for your 10900 patient recall letters reports. Once you have set the content and signature line you should usually only have to set the date to be printed on the letters.

Process 10900 Recall Letters compiles the 10900 Recalls and presents the letters report for preview prior to printing. Again you will be asked for date parameters as mentioned above. NB: The printout can be set to A4 or A5 paper.

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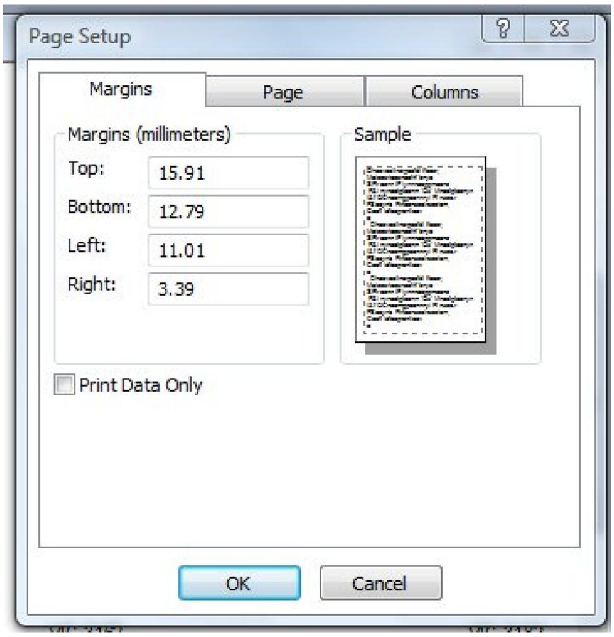
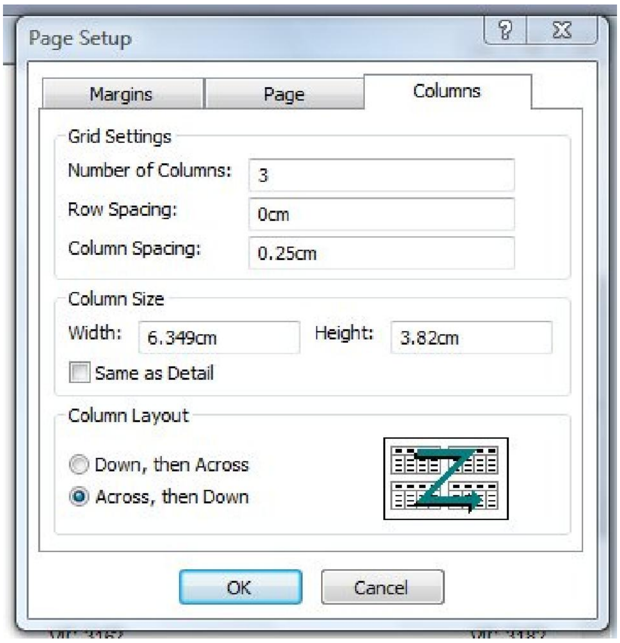
10900 Recall Labels prints a set of labels for mailing the recall letters *(make sure you enter the same date parameters as you did for the Process Recalls report)!* The labels are set to Avery J8160 63.5mm x 38.1mm which is a common label format available at most stationers. NB: The labels are A4 sheets. Page margins are set as below.





Edit Other Recall Letter

When you click the **Edit Other Recall Letter** button you are presented with a screen to edit the recall letter content.

You type in the date for the letter, your content and signature line. This becomes the content for your other patient recall letters reports. Once you have set the content and signature line you should usually only have to set the date to be printed on the letters.

Process Other Recalls compiles the Other Recalls and presents the letters report for preview prior to printing. Again you will be asked for date parameters as mentioned above. NB: The printout can be set to A4 or A5 paper.

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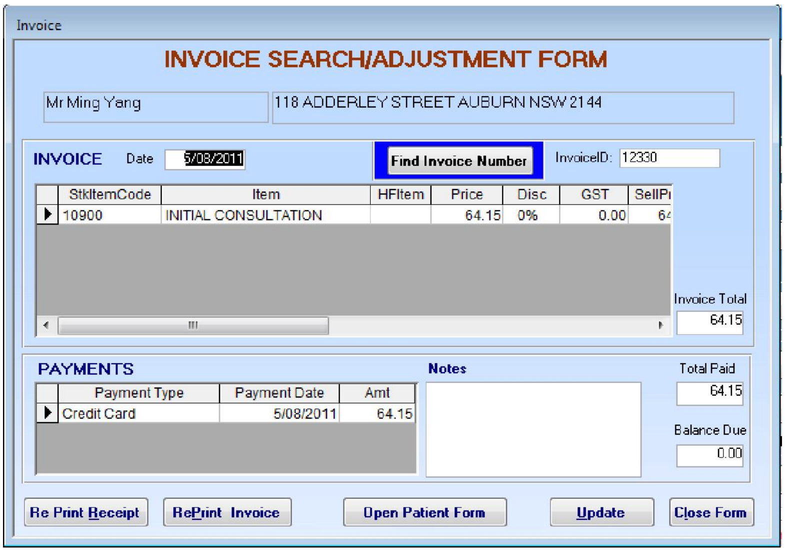
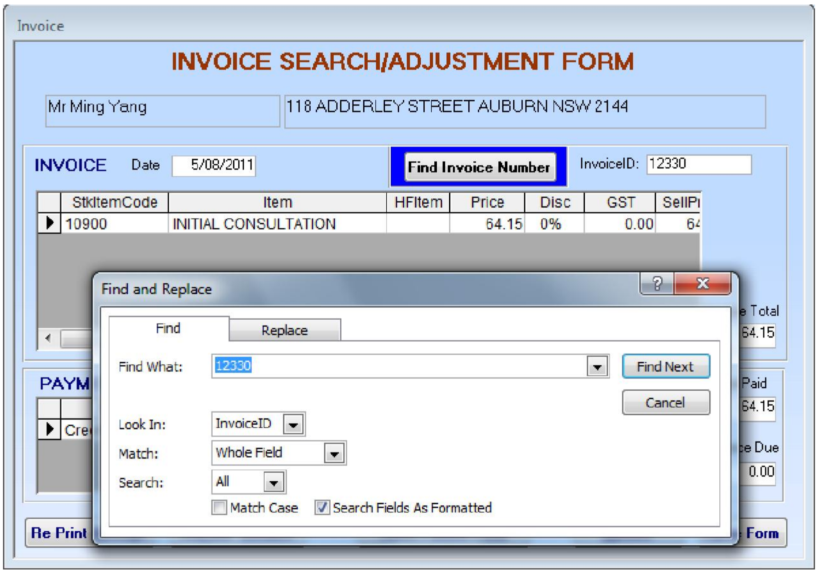
GLOBAL INVOICE SEARCH / ADJUSTMENT

The **Invoice Search / Adjustment** form is accessed from the reports screen by clicking the Invoice Search/Adjustment Form button.



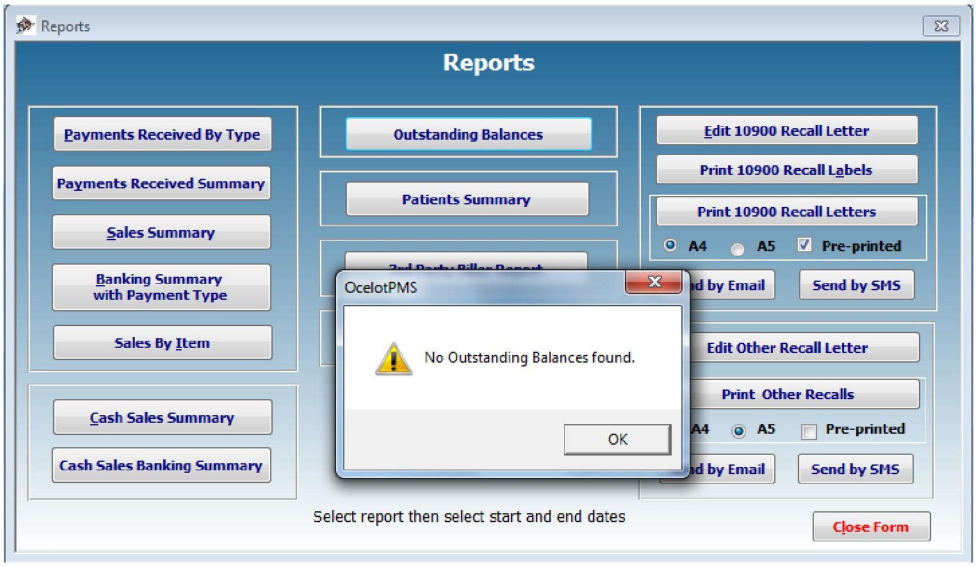
To search or adjust an **Invoice** the first thing you must do is click the **Find Invoice Number** button, the **Find and Replace** screen will show on the screen and the cursor will be focused in the Find What box. You need to enter the Invoice ID of an invoice you want to search for in this box and click **Find Next** button. (1 is the Invoice ID used in this search sample.)



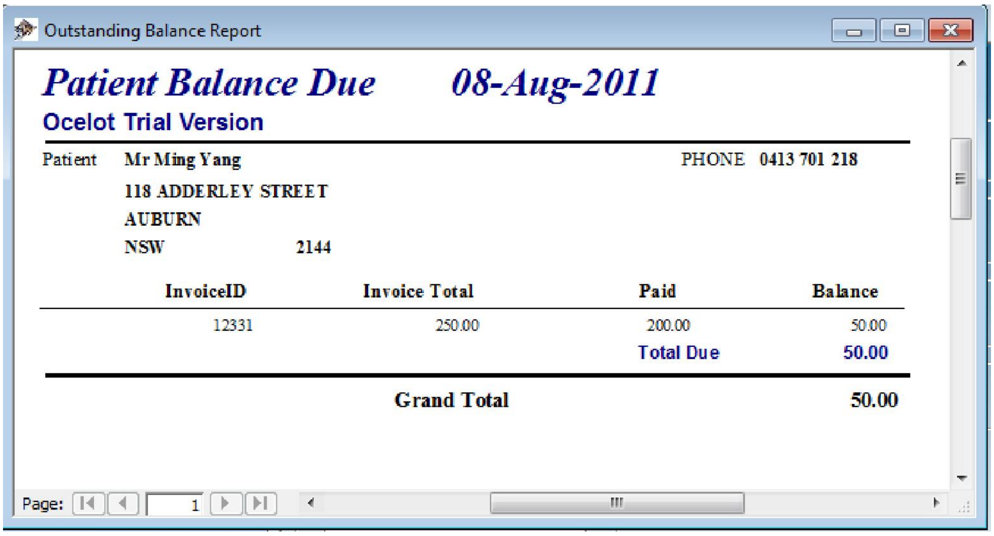
After locating the required invoice click the cancel button, you can edit the form as per the standard invoice screen, including reprinting if necessary.

OUTSTANDING BALANCES REPORT

The Outstanding Balances Report shows details of any outstanding accounts. If no amounts are owed the report does not proceed and shows the message detailed below. This report is an automatic one click process.



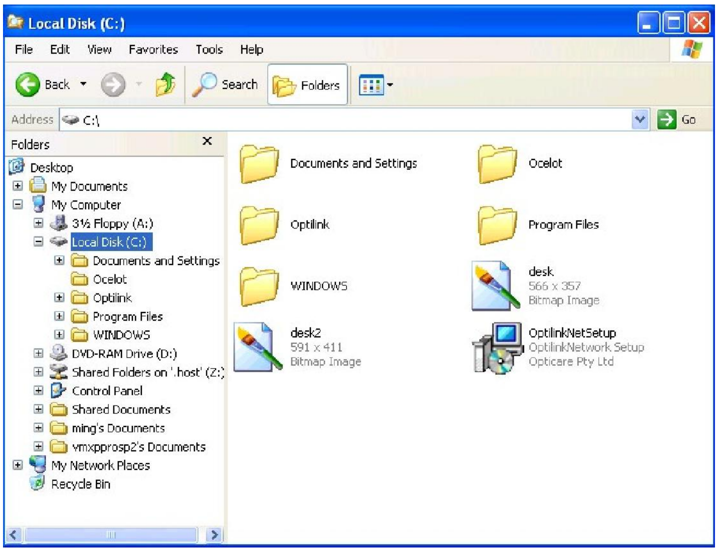
If there are any amounts owing they will be displayed as below.



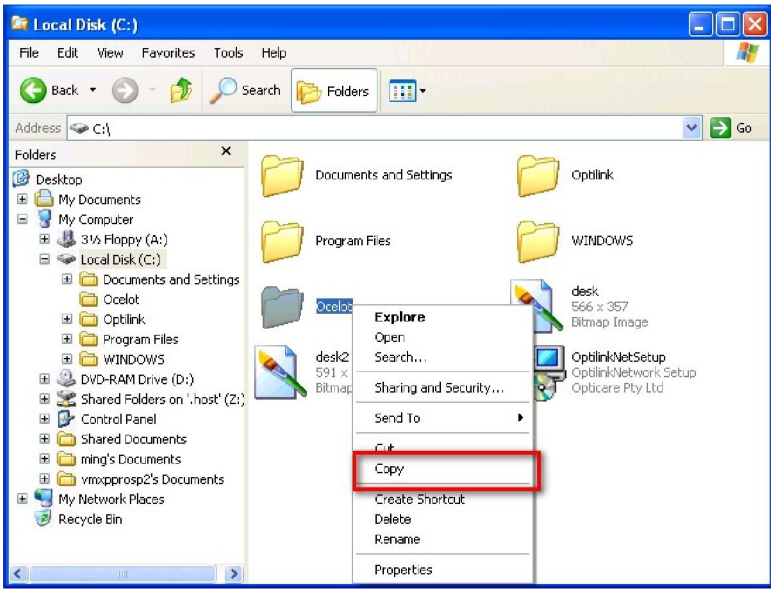
Backing Up Ocelot

The following example is for backing up Ocelot with a USB key mini drive. Insert your USB key then open My Computer and select folders view as below.

Click the plus sign next to Local Disk C to expand the folders tree.



Click the **Ocelot** folder as below. (The installed files may vary depending on which version you are using.)



Right click the folder and select **copy**, then scroll down to the USB key folder. *Warning never select cut- you will lose your program files!*

Right click on the USB key drive and select **paste**. This will paste a copy of the Ocelot folder and files to the removable drive.

Back up as often as you feel it is necessary for your data protection. It is a good idea to also periodically back up to CD. For instance you may do a daily copy to your USB key and a weekly copy to CD.

When you have completed your backup it is a good idea to rename the folder on your USB key drive, a good name to use is simply the date of the backup. You can also zip the folder to save disk space. As you create more backups you can delete your old backups or copy them to CD.

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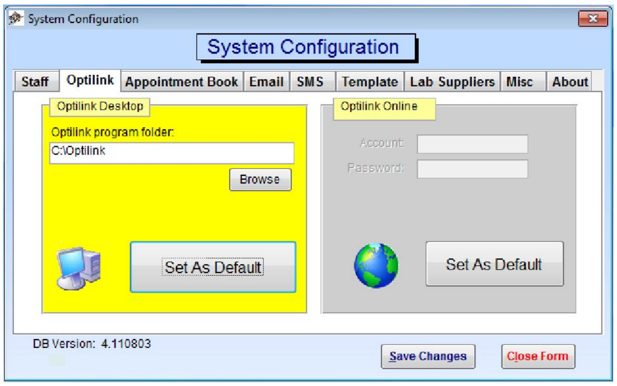
Sending Jobs Via Optilink Desktop version

Notes: To enable the function of sending job via Optilink Desktop, you need to install Optilink Desktop version first. If you don't have Optilink Desktop program installed on your computer, please phone Opticare at 02 9748 8777 to arrange it.

SETUP for Optilink Desktop

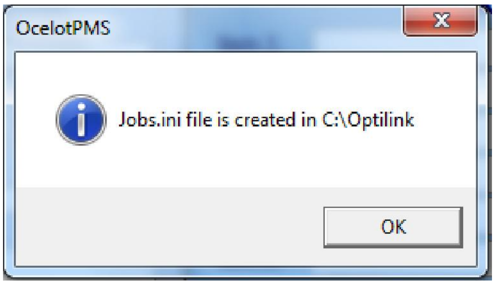
Clicking the **Optilink** tab accesses the Optilink configure form in **System Configuration** screen.

Click the **Set As Default** button **in Optilink Desktop** section. Clicking **Browse** button to select the folder where Optilink installed. Then click **OK** to back to system configuration screen. By default Optilink is installed to "C:\Optilink" folder. **NB: Please DO NOT change this settings unless you have installed Optilink on your system.**

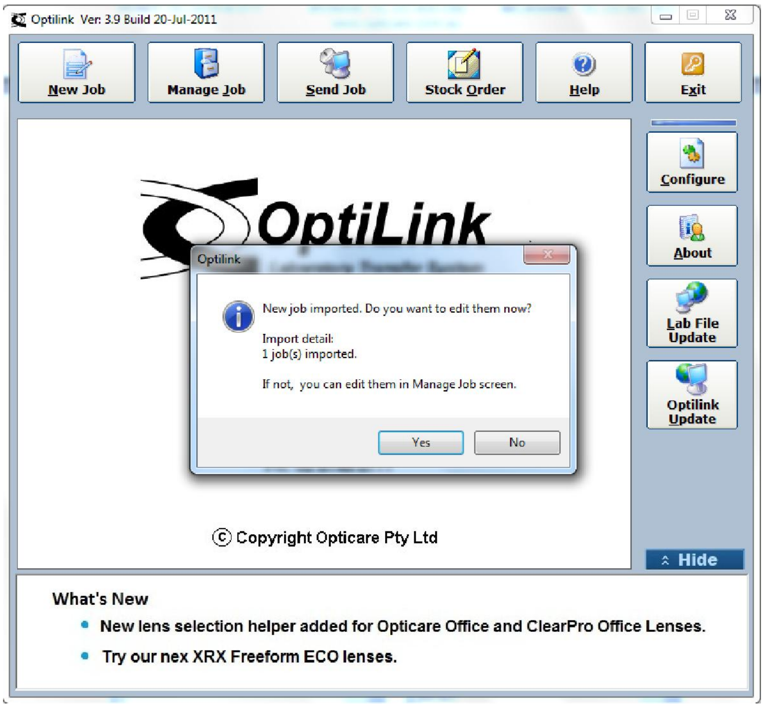


Sending job

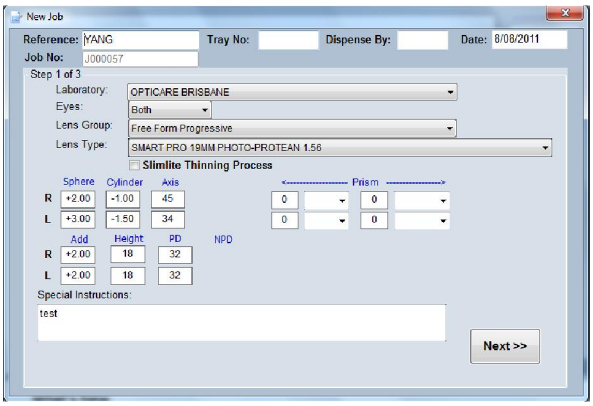
You can find an **Optilink** button in RxPad screen. After filling required fields for a job, click the **Optilink** button to transfer job data to Optilink.

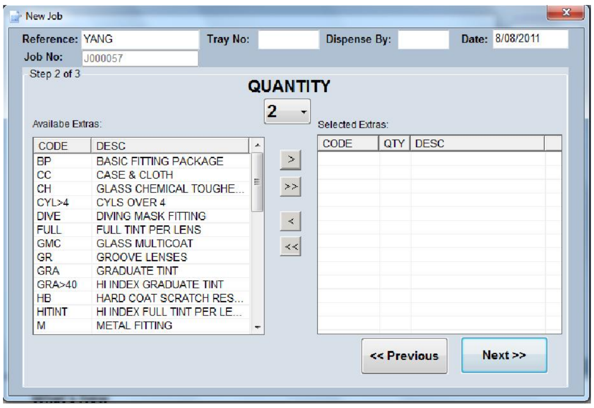


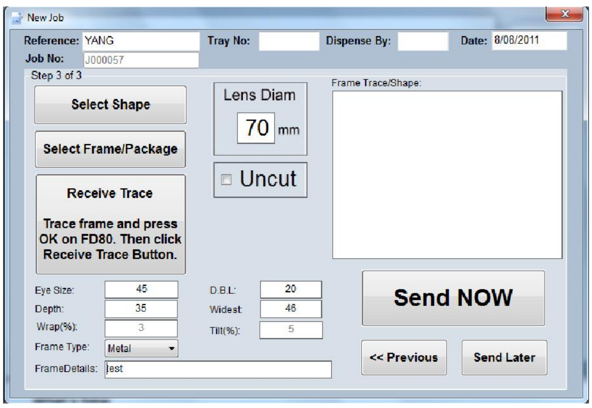
Clicking **OK** button on the job create finished window starts Optilink.



Clicking **Yes** button shows an edit imported job screen. In that screen you need to select lens group, lens type, extras, and trace frame (if necessary) to complete job details. Clicking **Send Now** to send the job immediately or clicking **Send Later** to send it with other jobs. For further information please refer to Optilink help file which is installed with Optilink.





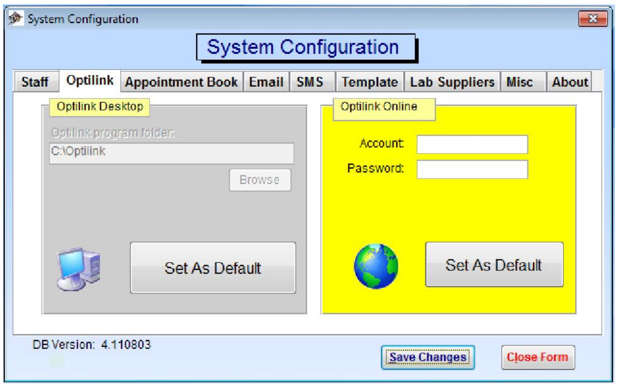


Send jobs via Optilink Online version

SETUP for Optilink Online

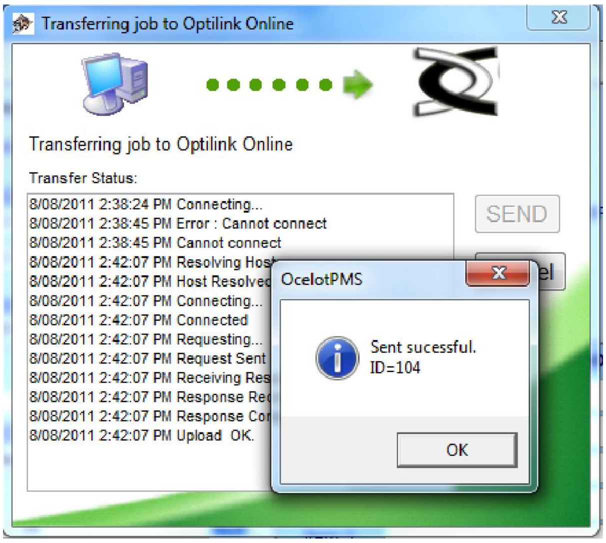
Clicking the **Optilink** tab accesses the Optilink configure form in **System Configuration** screen.

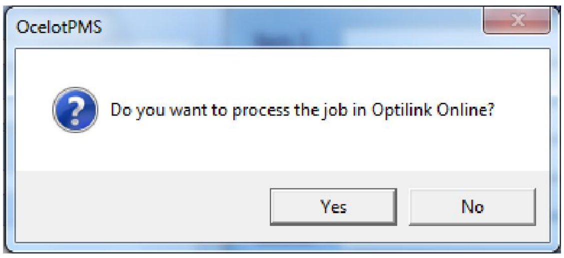
Click the **Set As Default** button **in Optilink Online** section and fill in your account detail. If you don't have an account with Opticare, please phone Opticare at 02 9748 8777 to arrange it.



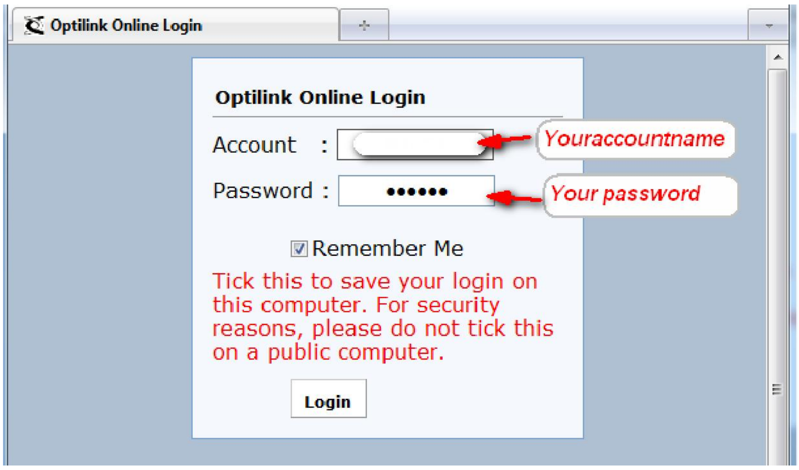
Sending job

You can find an **Optilink Online** button in RxPad screen. After filling required fields for a job, click the **Optilink Online** button to transfer job data to Optilink Online.

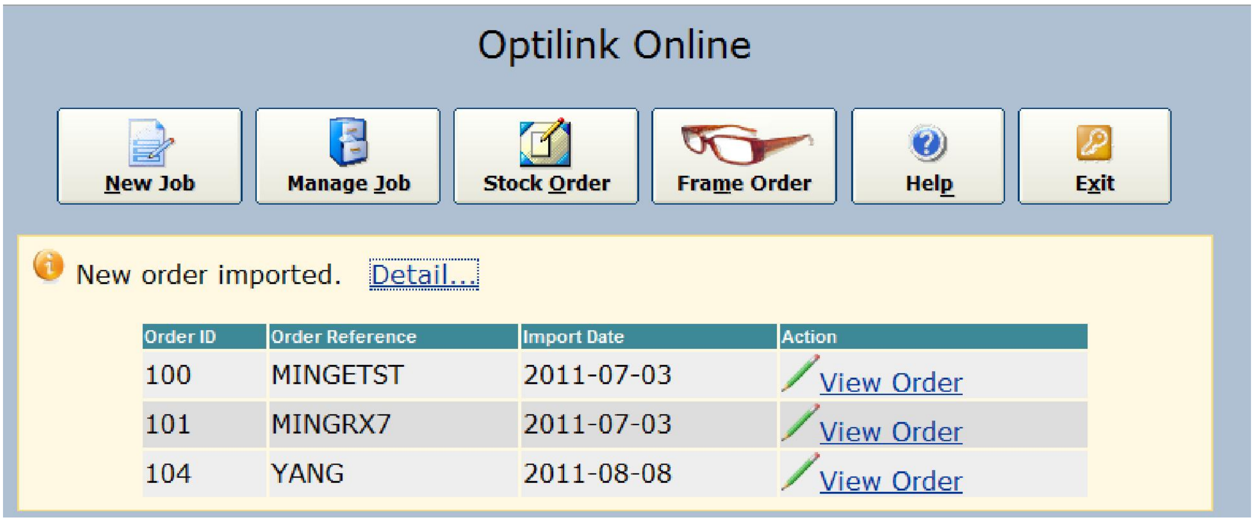




Clicking **OK** button on the job transfer finished window and click **Yes** button to start Optilink Online.



Enter your Optilink Online Account and Password, then click Login button.



Click on the View Order link next to the order you just imported to process the order. If more than one imported order shows in the list, please use the Order Reference and Order ID to find the correct one.

NB: The Order ID is the same number showed the above transfer finished window.

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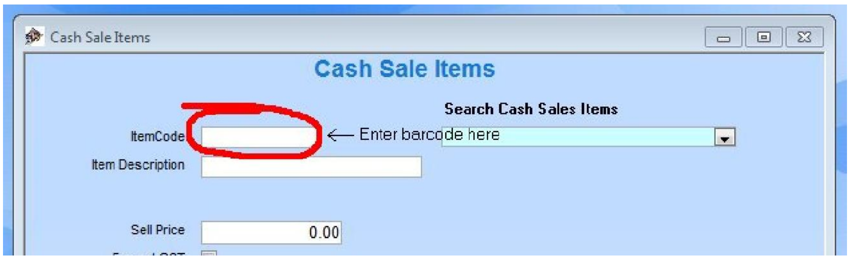
Barcoding

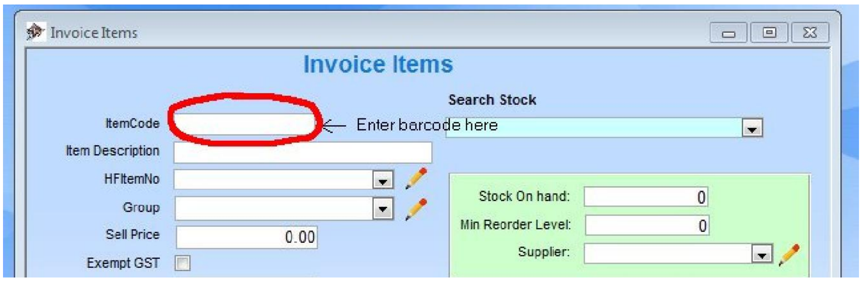
Ocelot is compatible with most barcoding labels and systems. We have specifically tested Ocelot with Brother and Avery systems using EAN 8 and EAN 13 labels and results were excellent.

Most products that are precoded will be using EAN 8 or 13 barcodes.

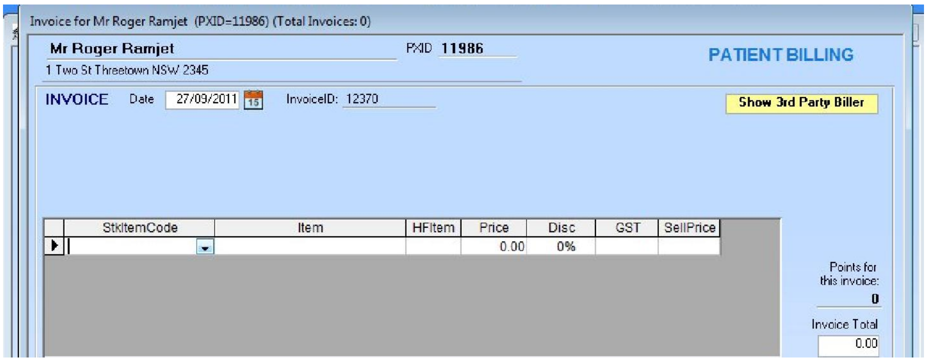
To Use Barcoded Products with Ocelot

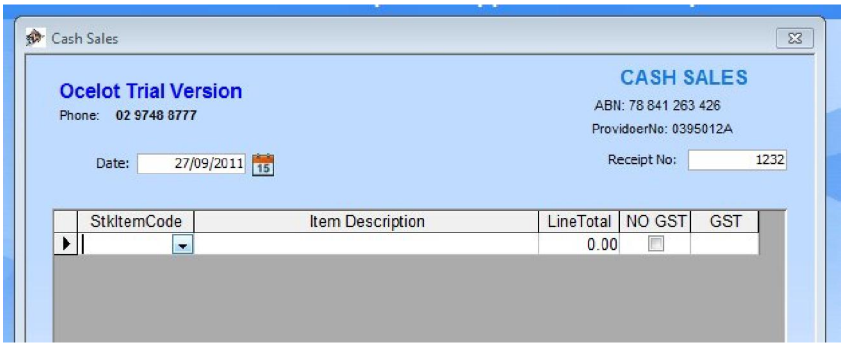
Products that arrive barcoded have to be entered into the system before the barcoding can be utilised. They are entered as per any other Cash Sale or Invoice Item, all you have to do is wand or manually enter the barcode in as the Item Code.





You can then recall these products by wanding or entering the code as required such as when invoicing or processing a cash sale. The cursor is placed into the Item Code field then the item is scanned.





Creating Your Own Barcode Labels

If you wish to create your own internal barcode labels you can use any label printer and software that is barcode capable. You will need to follow the instructions for each package.

Ocelot has been tested with the Brother QL 570 and P-touch 1230 PC printers and Brother P-touch Editor 5.0 software and had excellent results with single label printing and scanning.

Ocelot has also been tested with Avery DesignPro 5 labelling software with sheet labels and also had excellent results.

The above mentioned are only two of many available systems the type of printing and label system you use is entirely up to you.

Setting up In House barcodes in Ocelot

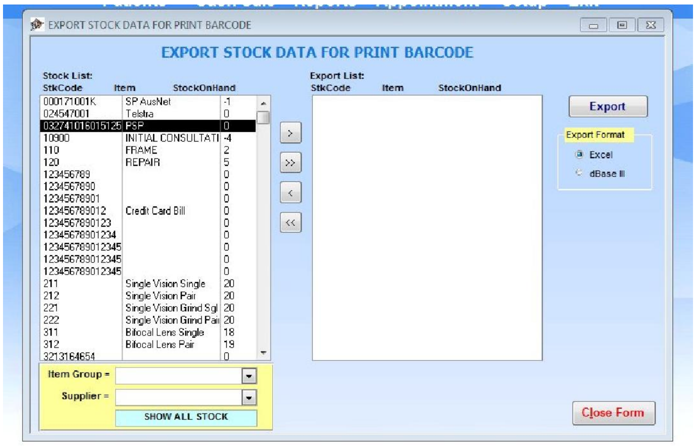
To set up In House barcodes with the codes manually entered into Ocelot then exported to a label printing system it is best to use the Code 39 barcode font (also known as Alpha39, Code 3 of 9, Code 3/9, Type 39, USS Code 39, or USD-3) which is available as a free download.

With Code 39 codes it is more practical to limit yourself to no more than ten characters for ease of printing.

These codes are entered as per any other Cash Sale or Invoice Item but you can only use uppercase A to Z and numerals 0 to 9 or a combination of each.

NB: It is important to work out your own consistent and unique naming convention prior to developing your own in house codes.

You can enter the item codes manually then export them from Ocelot to any labelling system that accepts XL or dbf data, such as Brother or Avery. (Brother can be done as single or multiple labels but Avery are sheet format and more suited to multiple labels).



Alternatively you can create your labels first in the labelling software, using any EAN 8 or 13 or Code 39, then scan them into the system as previously detailed for products that arrive barcoded.

Creating In House Scanning Sheets

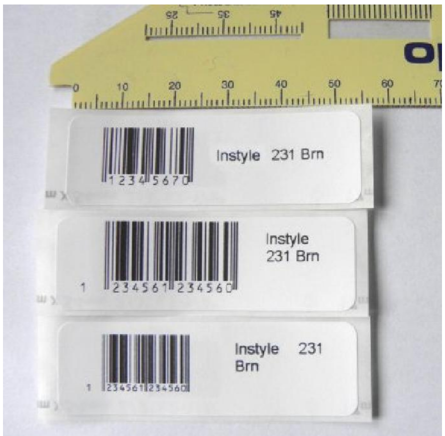
Scanning sheets contain groups of often used items and/or items that are not suitable for individual labelling. An example of these are the sheets used at Bunnings registers for the screws, nuts and bolts.

These can be easily done in spreadsheet format and samples are provided on the following page in free 3 of 9 format together with EAN 13 label samples.

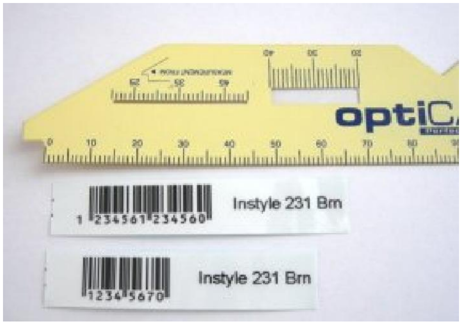
Ocelot support can also set up your barcoding system or create scanning sheets for you for a fee, see our web site for more details.

Barcoding Label Samples

Avery DesignPro EAN 13 label



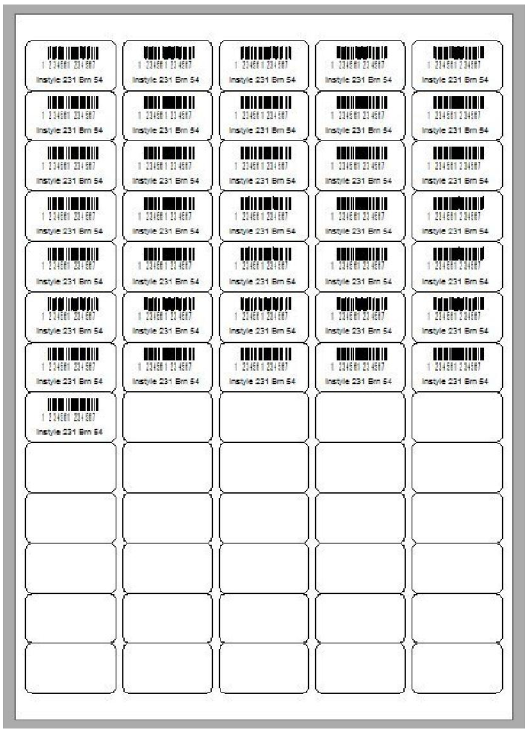
Brother QL 570 EAN 13 label



Brother P-touch 1230 PC
EAN 13 label

BarCode	ItemName
	10900 INITIAL CONSULTATION
	110 FRAME
	120 REPAIR
	211 Single Vision Single
	212 Single Vision Pair
	221 Single Vision Grind Sgl
	222 Single Vision Grind Pair
	311 Bifocal Lens Single
	312 Bifocal Lens Pair
	411 Trifocal Lens Single

Sample Scanning Sheet
Using Free 3 of 9 font



Avery DesignPro EAN 13 sheet labels