Ocelot

Practice Management System

User Guide

Version Release
1 June 2009

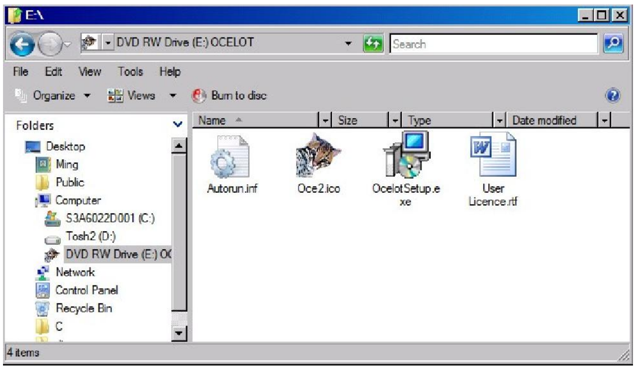
Developed and Distributed by Opticare Pty Ltd

Ocelot Practice Management System – Quick Start User Guide

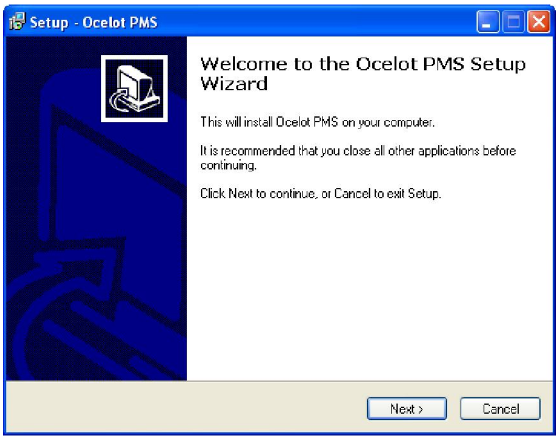
System Requirements
Windows XP or later
Screen resolution 1024 x 768 or above

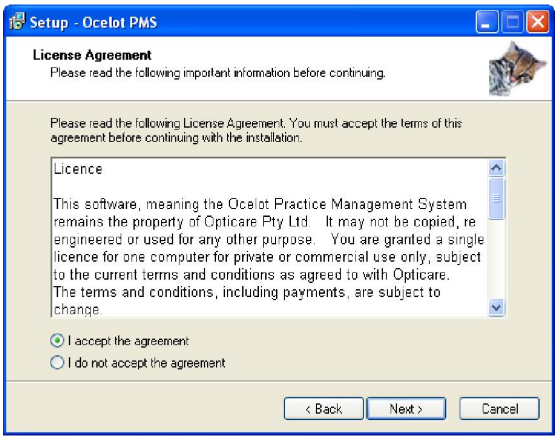
Installation

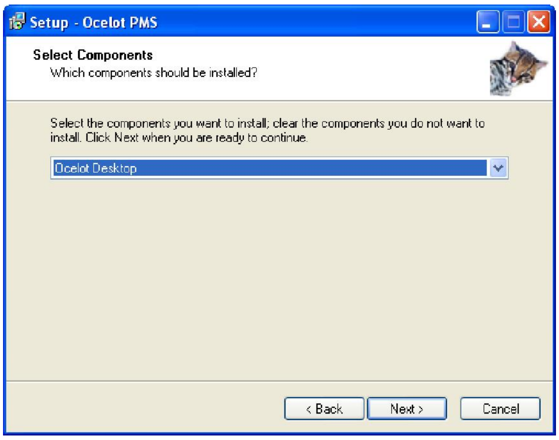
Ocelot Practice Management System is a Microsoft Access® runtime installation designed for use on Windows XP® systems. The system will run on Windows 2000® with service pack 3 but there may be some issues, Windows XP® is the supported platform. The system will run as a stand alone runtime version without 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.

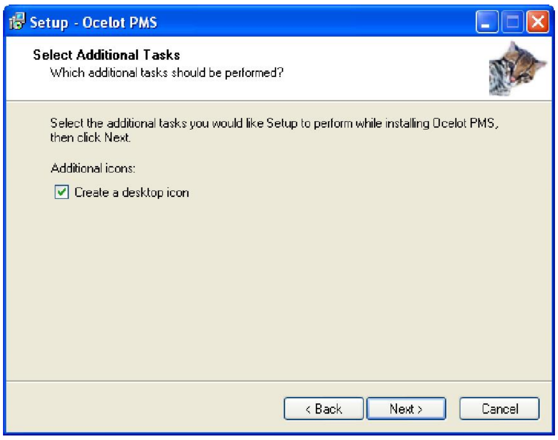


Follow the on screen prompts for a typical installation.









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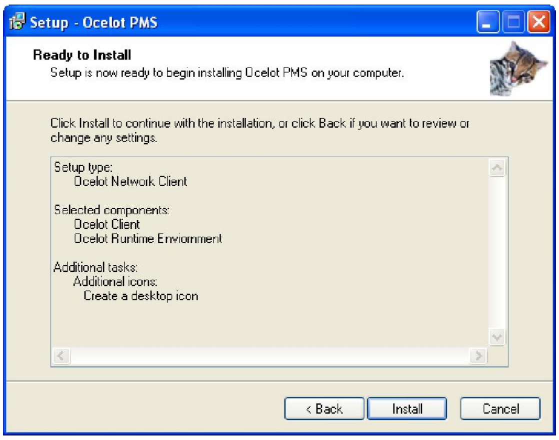
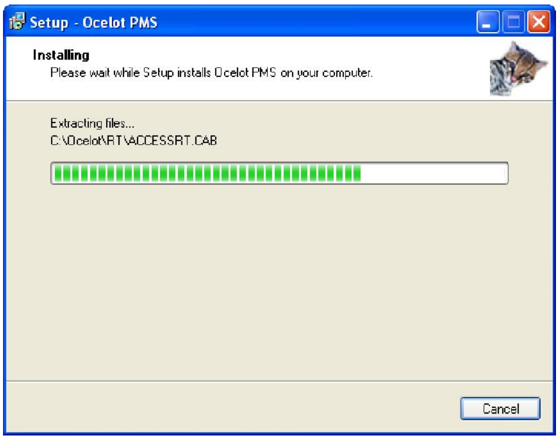
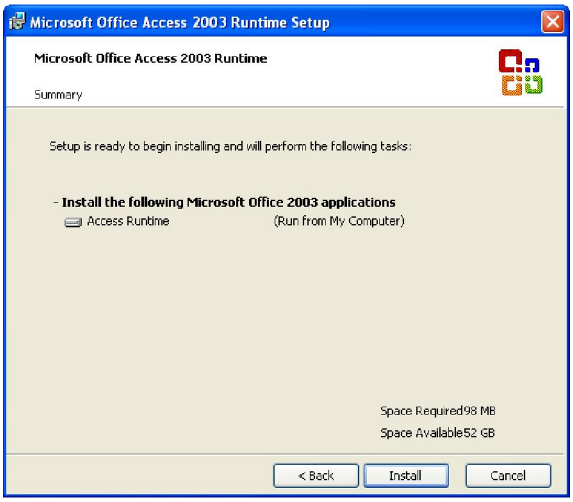
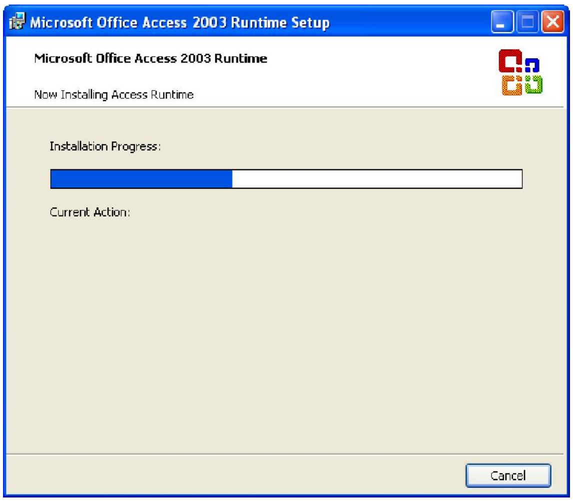
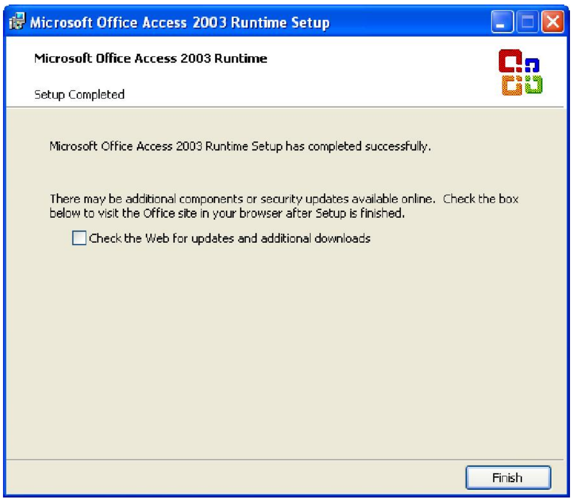


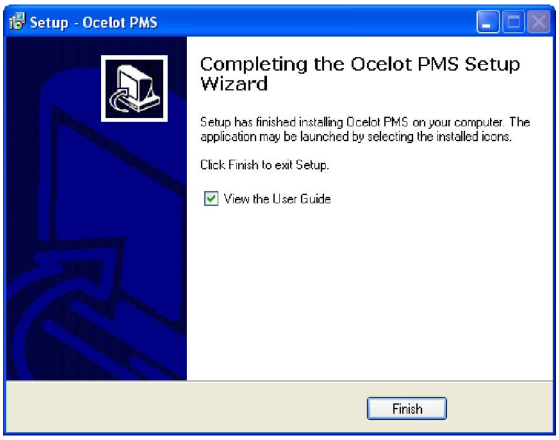


An Access Runtime Setup program starts automatically if the system didn't have it installed. Click **Install** button to continue.







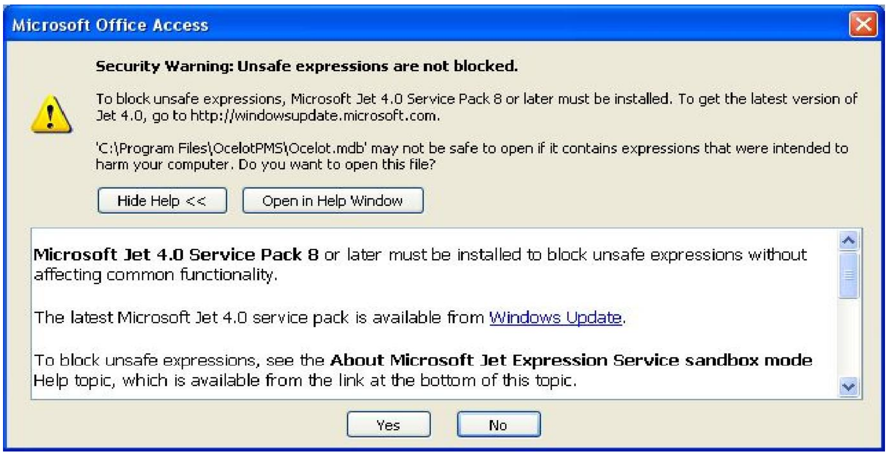


Start Up

Double click the Ocelot icon from the Desktop.

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

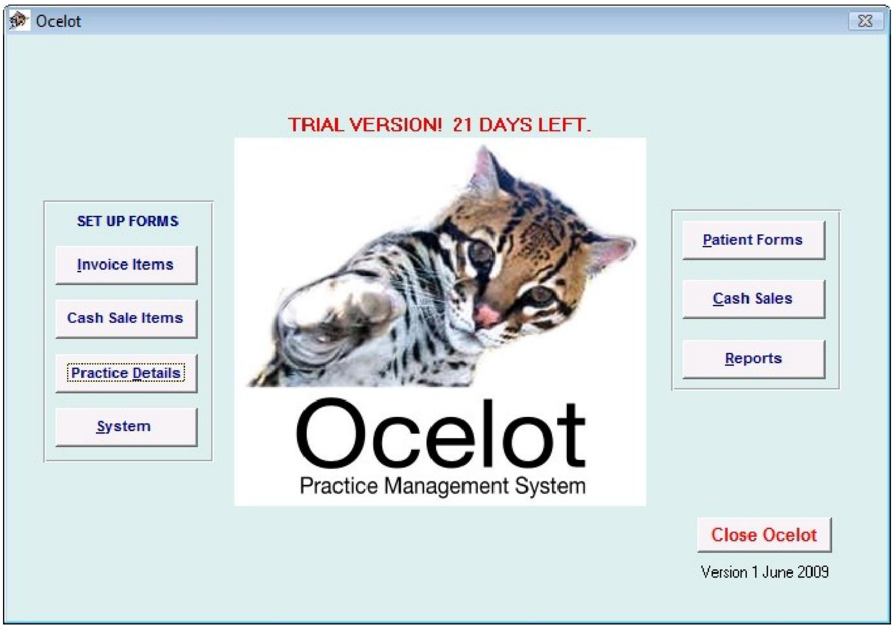
Click the **No** button. Then comes a warning message to ask if you want to open the file or not. Click the **Yes** button.



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

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

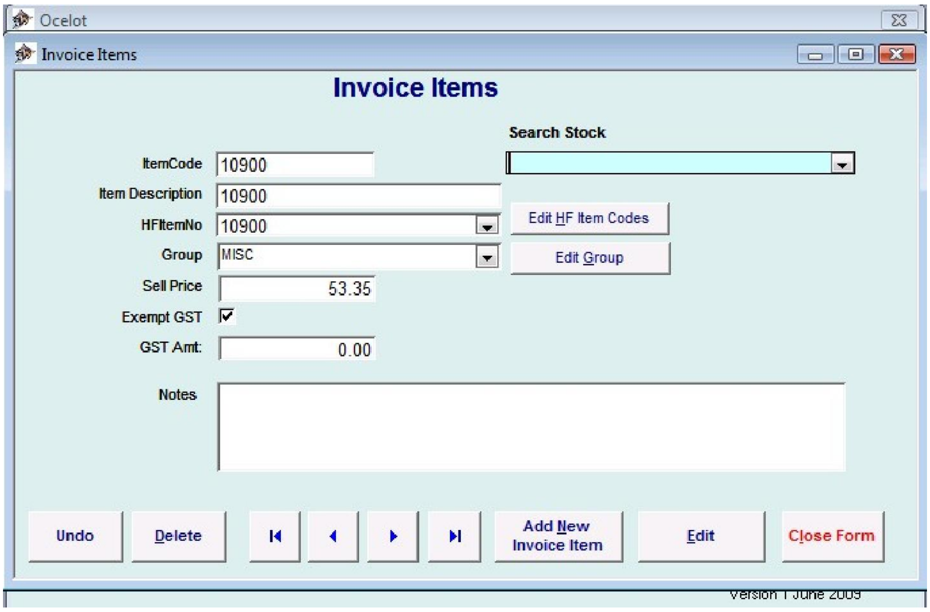
The first screen that appears after starting the system is the main Practice Management Screen. From here you can navigate to all areas of the system by clicking the appropriate buttons.



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. The procedures for this are detailed on the following pages.

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.

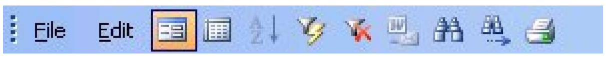
To add new items click the **Add New Invoice Item** button. Enter all the required details. You can scan a barcode label as the Item Code enabling you to scan for the same item when invoicing later. Allocate your item to a group for later reports. *(You can also click on the* ***Edit Group or HF Item 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.

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) " bar at the top 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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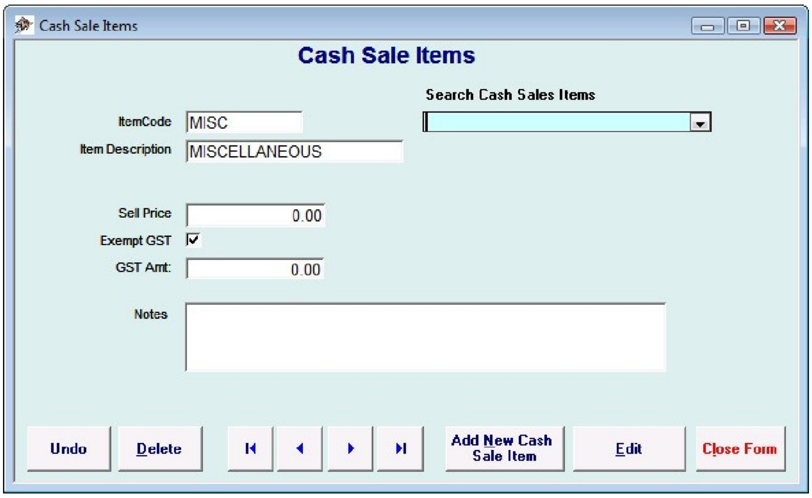
Cash Sale Items

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

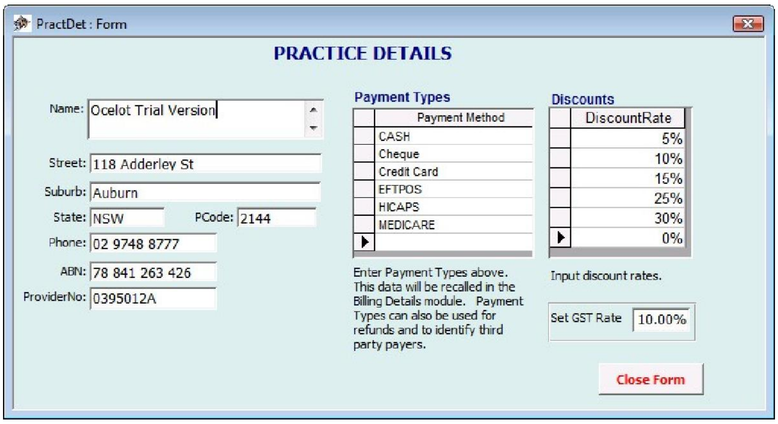


You will find a miscellaneous item already entered, you can either delete it or change the details to suit your own requirements.

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.



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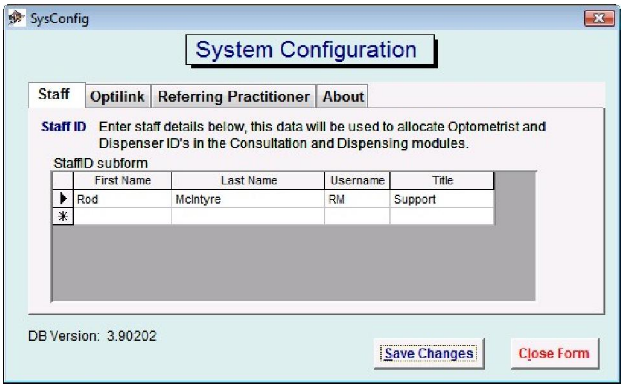
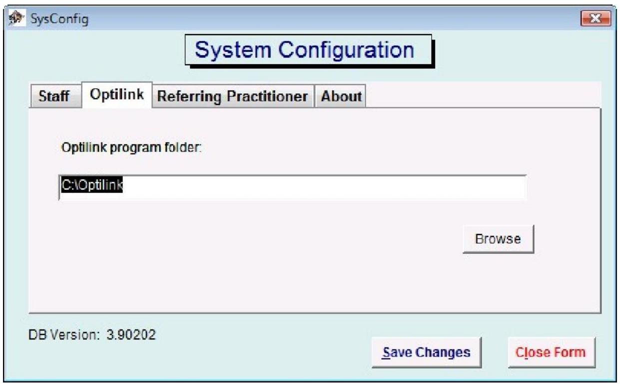
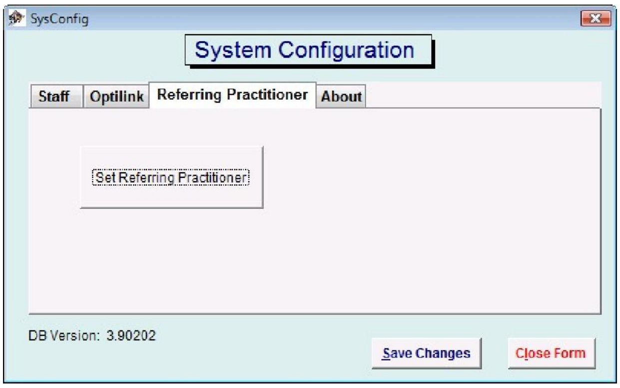
System

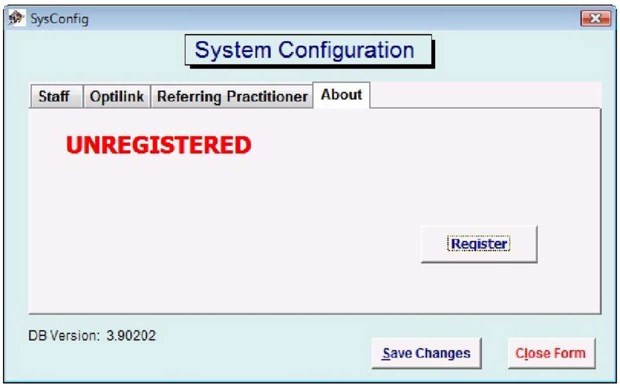
System consists of four configuration screens as detailed below.

1. For Staff ID's which will be selected in your forms.
2. Is for the Optilink folder location (for Optilink users only).
3. Is for referring practitioners which will be selected for referrals.
4. Is for initiating the registration process.









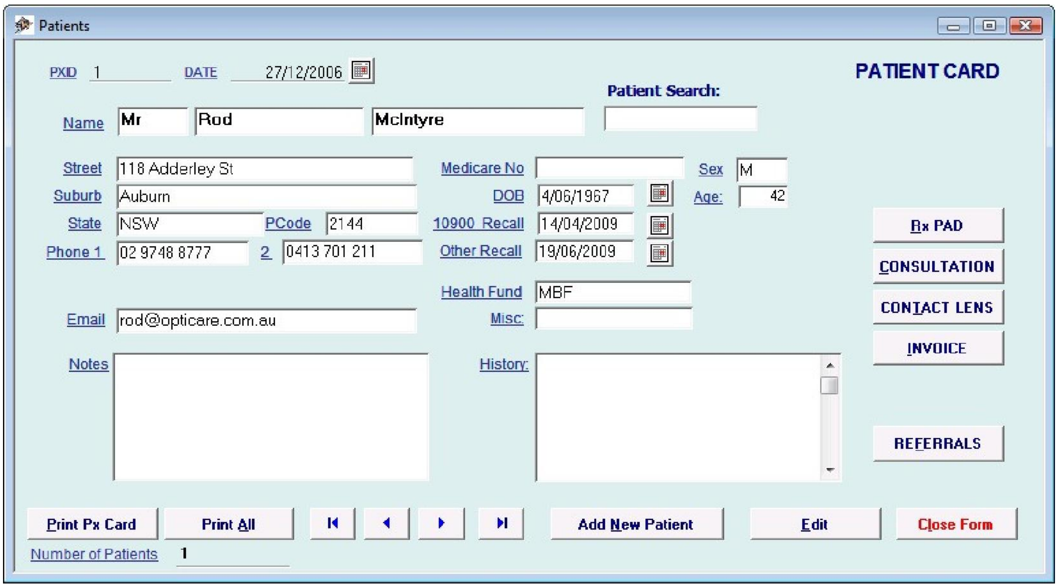
Clicking the **About** tab accesses the registration form. After arranging registration you click the register button to complete the process and enter your licence key. **NB: Offsite registrations need to be arranged by appointment – Phone Rod McIntyre on 0413 701 211 to arrange a time.**

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.

Print Receipt - Prints the receipts for part payments for lay-by, deposits etc. The printouts are set to A5 paper.

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

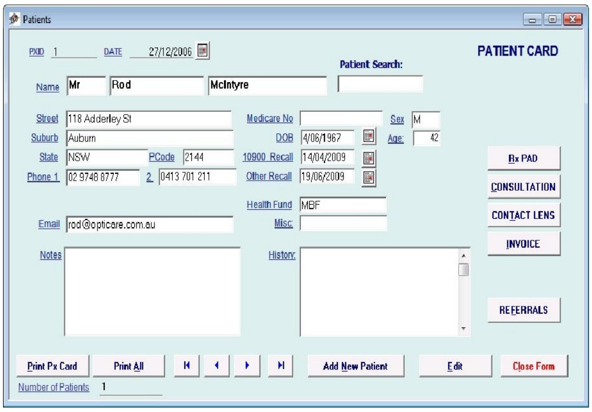
Process 10900 Recall Letters - The printout can be set to A4 or A5 paper.

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 PMS

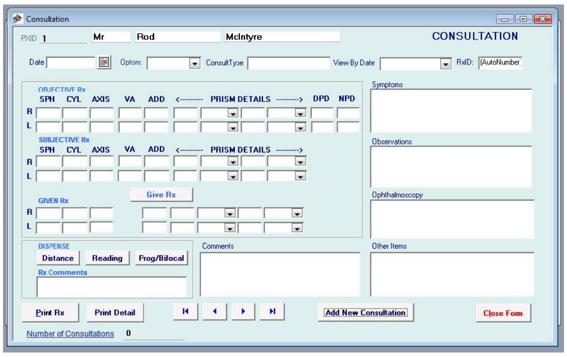
From the Practice Management Screen main screen click the **Patient Forms** button. The Patients Form will open, here you can enter the patient details and recall date. Most work will be done from the Patient Card from which you can navigate to the Rx Pad, Consultation, Contact Lens, Invoice *(Patient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

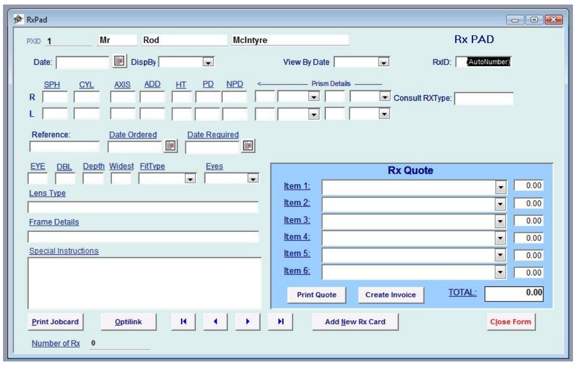


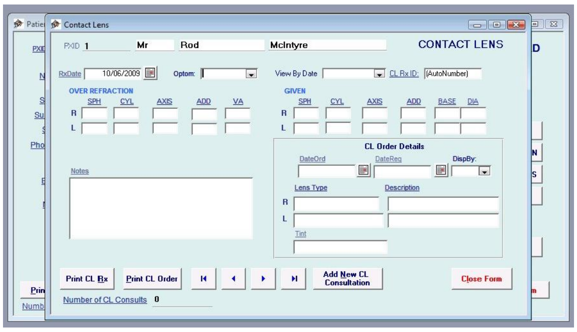
To enter a new patient click the **Add New Patient** button, the date will automatically default to the current date, this can be edited if required. Enter the required details in the patient's card and click the **Update** button to save the data, if you need to edit the data at a later date you will 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. When you have many records entered you can enter a patients surname in the **Patient Search** field then double click on the required patient to select them and open their form.

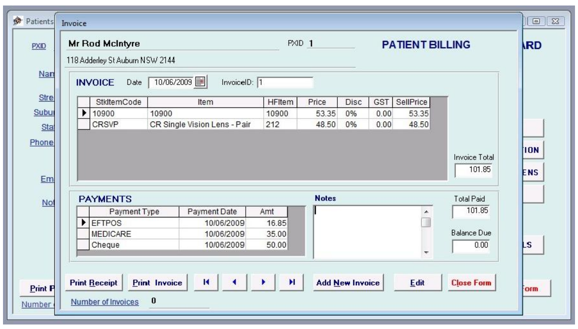
Print Px Card - If your printer is setup to print 6x4 index cards you have the option of printing a card with the basic patient detail. **Print All** – Prints all patient detail to an A4 page.

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





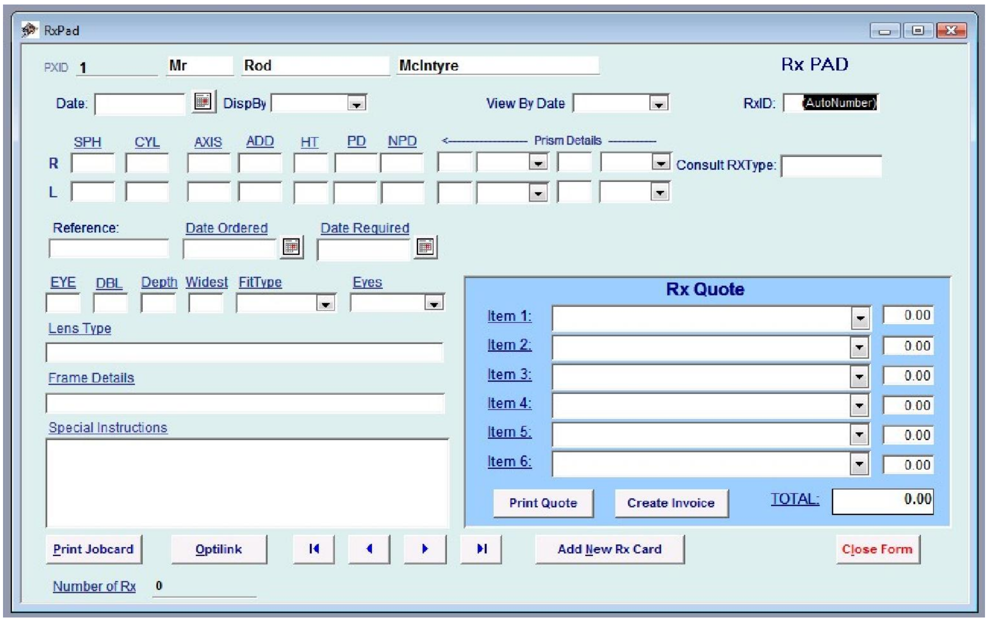




Rx PAD

To navigate to the **Rx PAD** click the Rx PAD button on the Patient Card. 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.

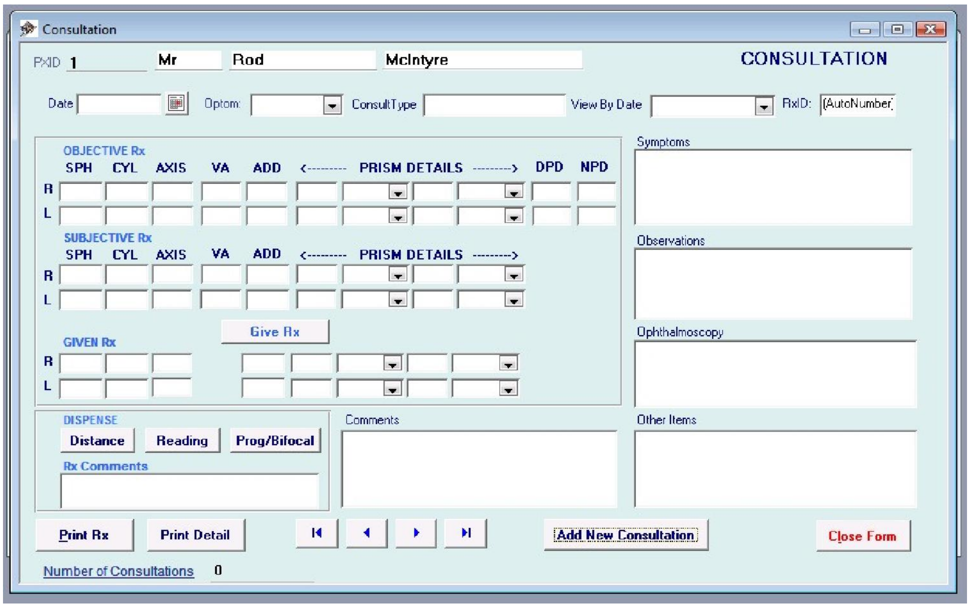
Selecting **Print Jobcard** previews the jobcard form, if you are happy with the detail you can then print the form by clicking the print icon on the toolbar *(or selecting File – Print from the File menu)* for forwarding to the laboratory or processing internally. NB: The printout is set to A5 paper.

Selecting **Optilink** 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.



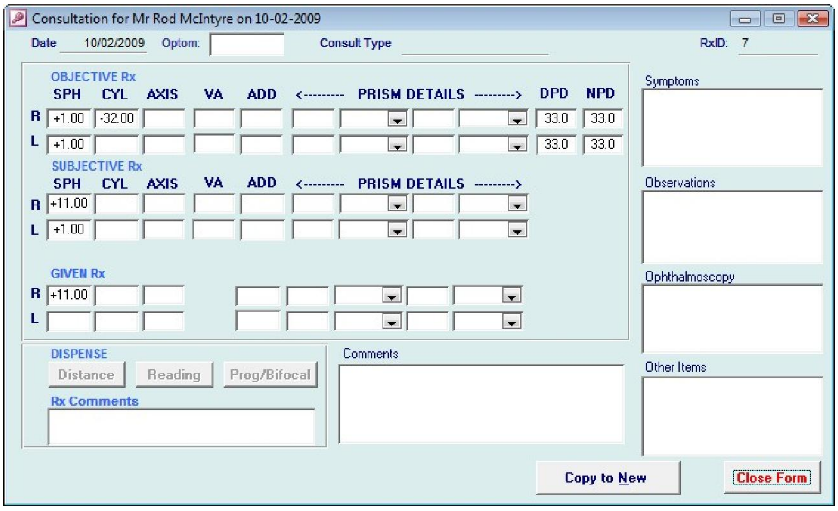
If you already have a consultation record entered you click the **Add New Consultation** button to create a new consultation record.

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.

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.

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.

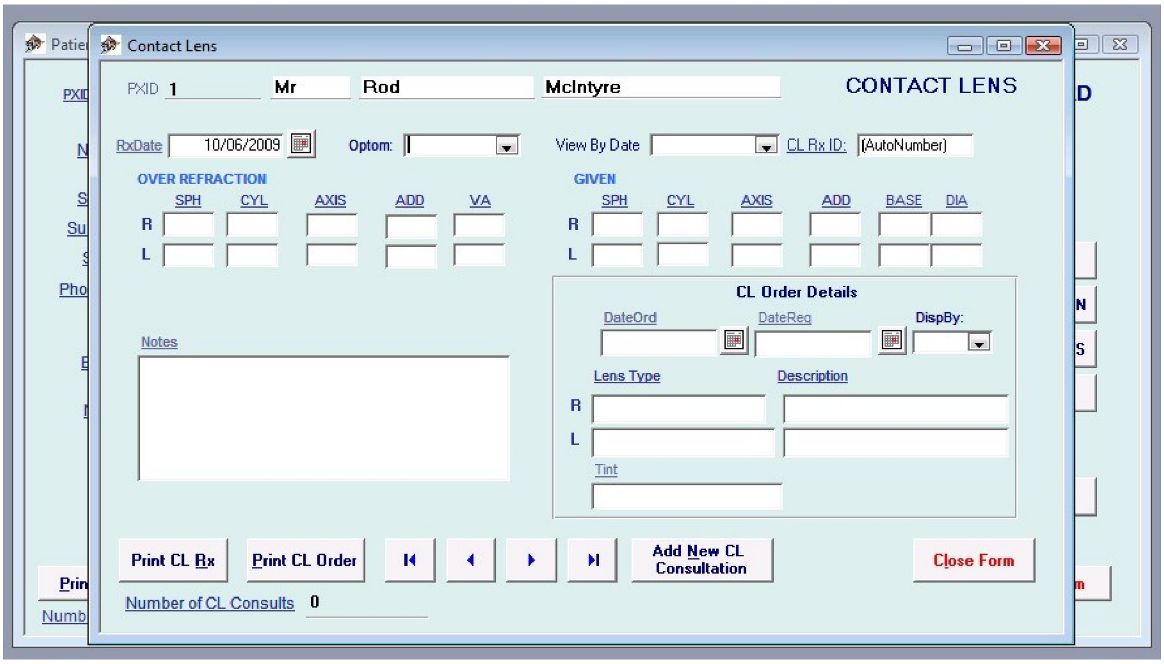


You can view consultation forms (will open in another screen) by the date entered by selecting the **View By Date** drop down field and selecting the required date. You can create a new consultation by click **Copy To New** button. It will copy Subjective RX and Given RX information across.

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.

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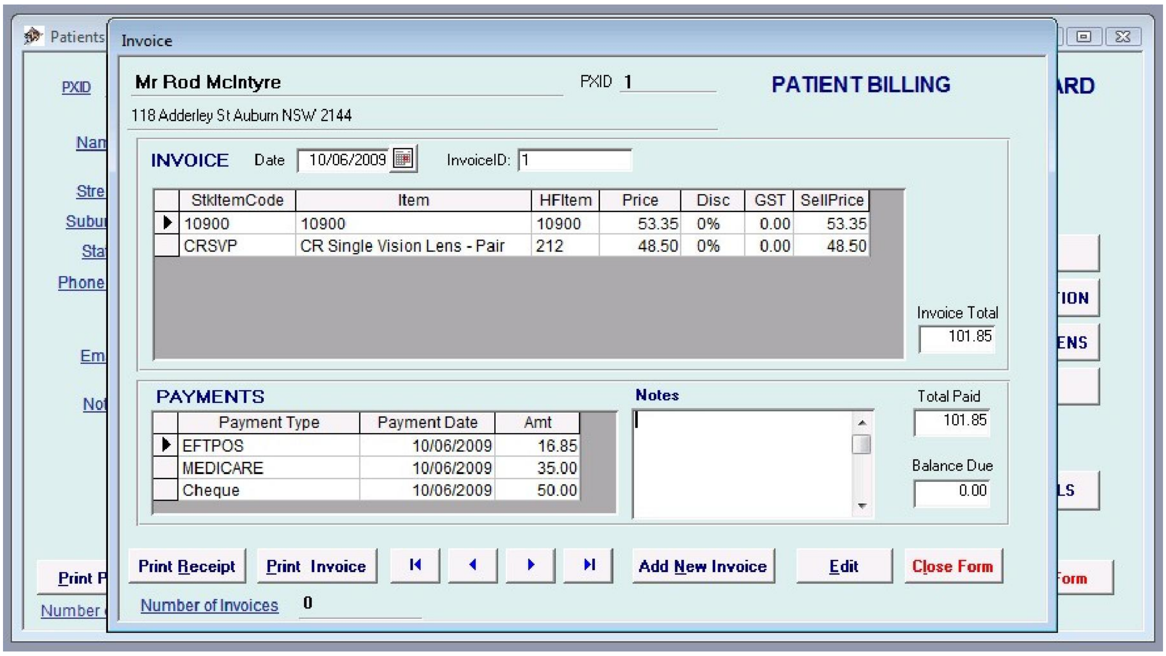
PATIENT BILLING

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.

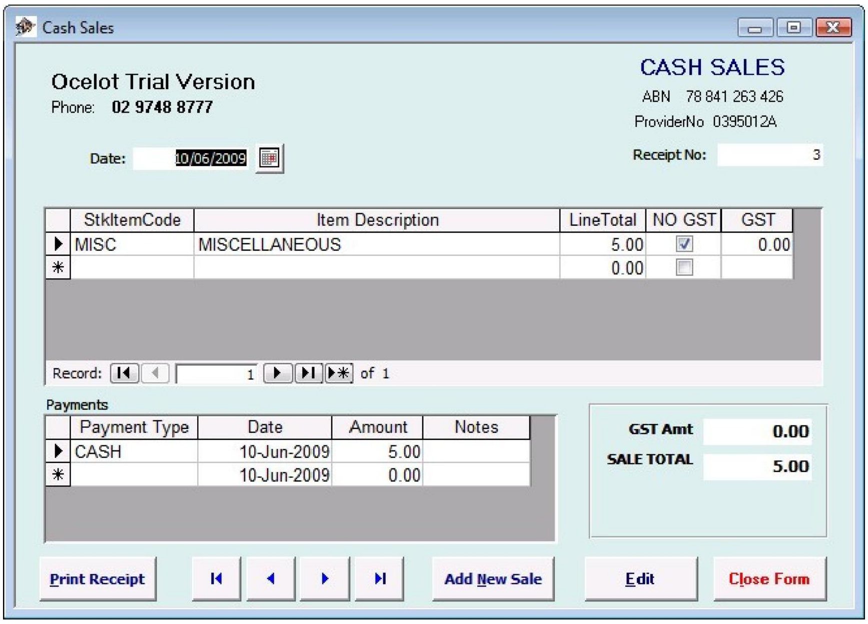
Print Receipt

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.

CASH SALES

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



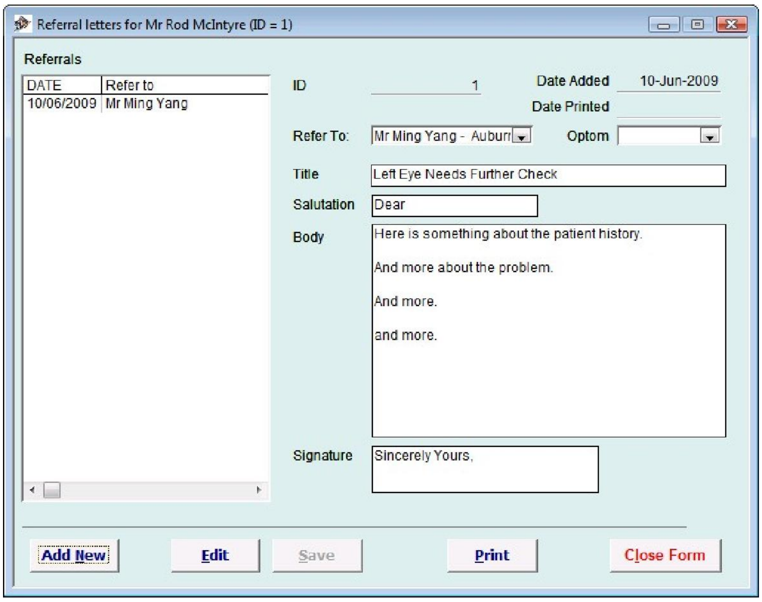
To create a new **Cash Sale** the first thing you must do is click the **Add New Sale** button, the **Date** details and **Receipt No** will be automatically allocated after doing this. You can then enter the rest of the required information. The CASH SALES can also accept freehand data if you wish to modify default data, just tab *(or click)* and type whatever detail you wish. GST is allocated by default, if an unusual occurence 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.

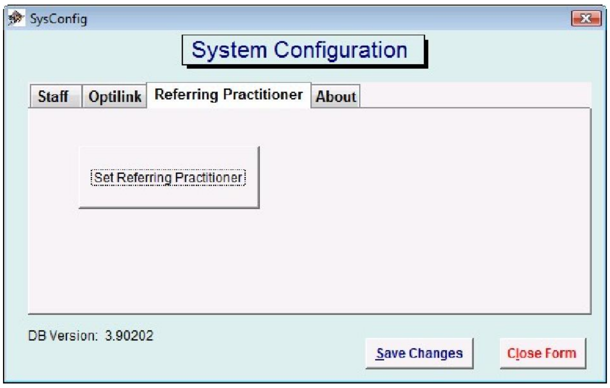


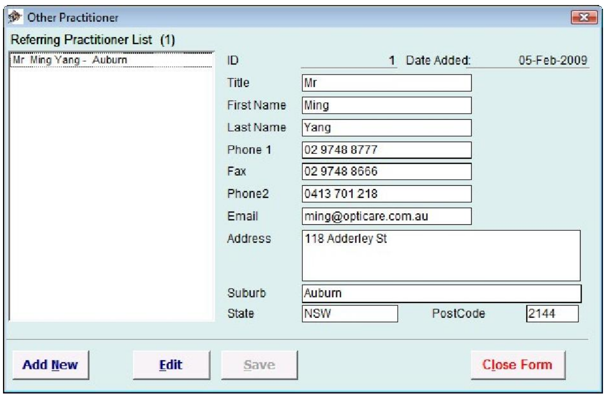
If it is the first entry the date will automatically default to the current date, this can be edited if required, you must select the **Refer To** and **Optom** details, and a referral ID will be automatically allocated. You can then enter the rest of the required information – simple tab (or click) 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 **Set Referring Practitioner** button in the **Referring Practitioner** screen in **System Configuration** form and do it there.





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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, Cash Sales Summary, Cash Sales Banking Summary, Outstanding Balances, Edit Recall Letters, Process Recalls and Recall Labels.

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.

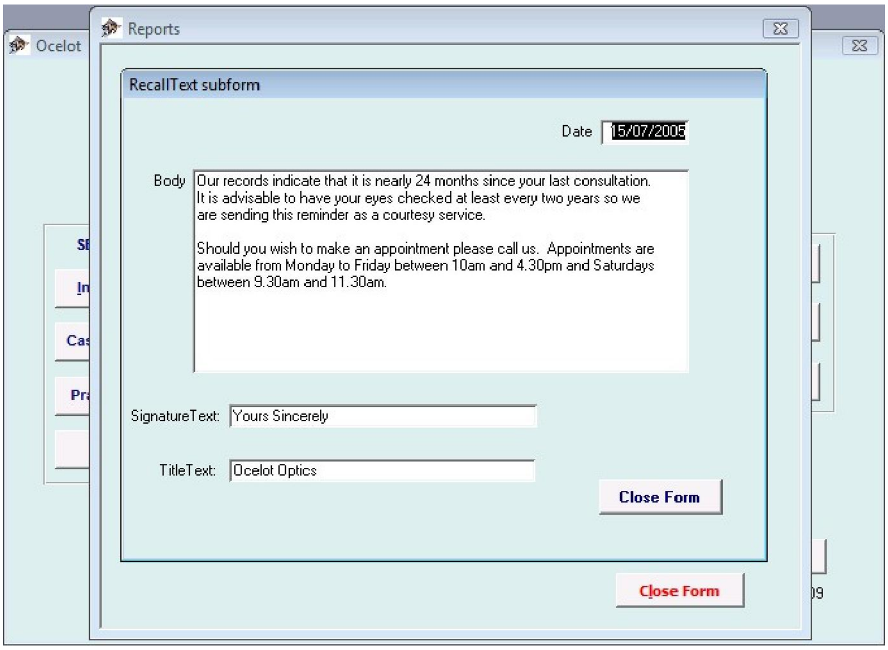
Sales By Item works as mentioned above and presents a report of grouped invoiced items between the chosen dates summarised with a sales and GST total for the selected period. NB: The printout is set to A4 paper.

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

Edit 10900 Recall Letter

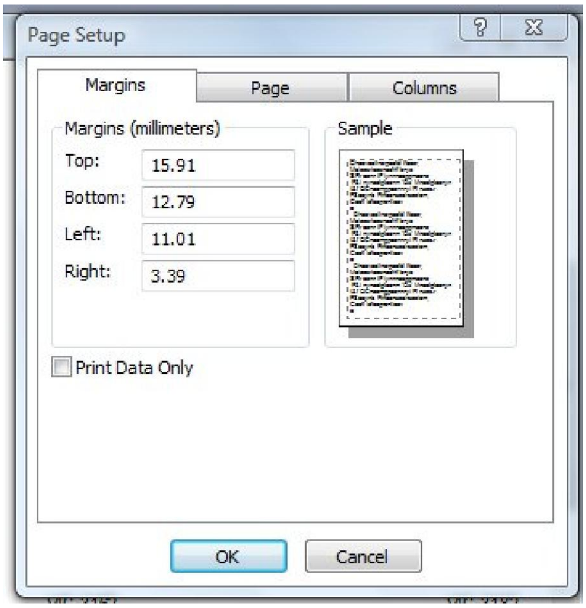
When you click the **Edit 10900 Recall Letter** button you are presented with a screen to edit the recall letter content.

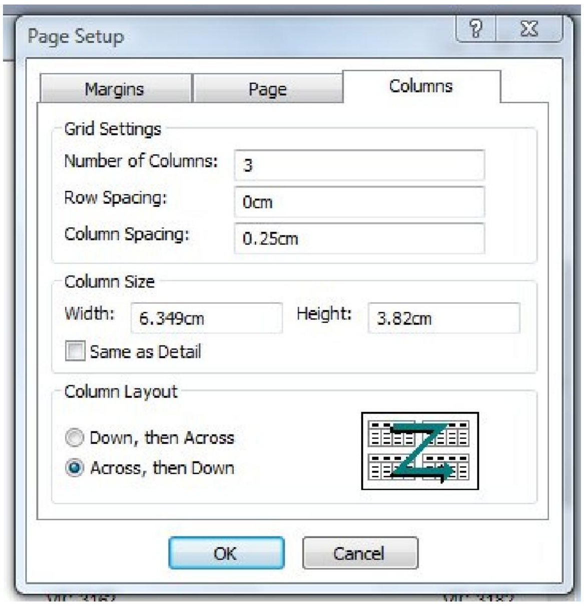


Type in the date for the letter, your content and signature line. This becomes the content for your 10900 patient recall letters reports. Once you have set the content and signature line you should usually only have to set the date to be printed on the letters.

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.

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

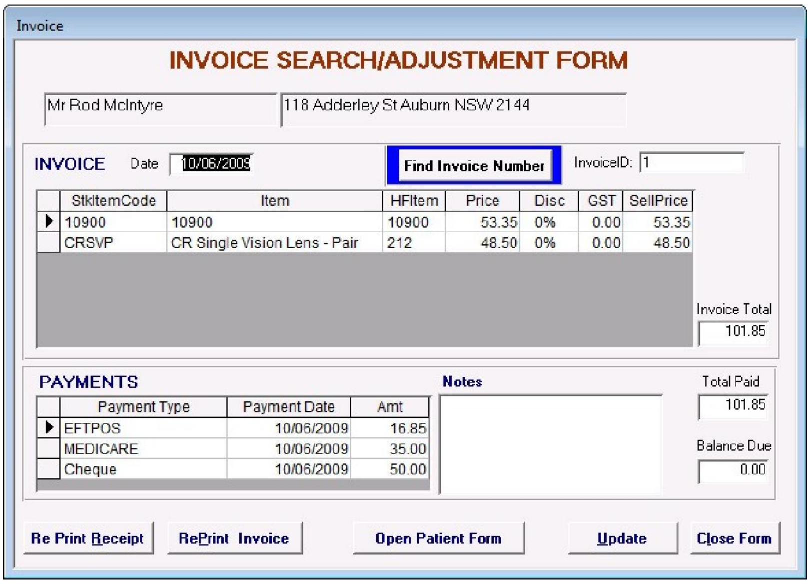
When you click the **Edit Other Recall Letter** button you are presented with a screen to edit the recall letter content.

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.

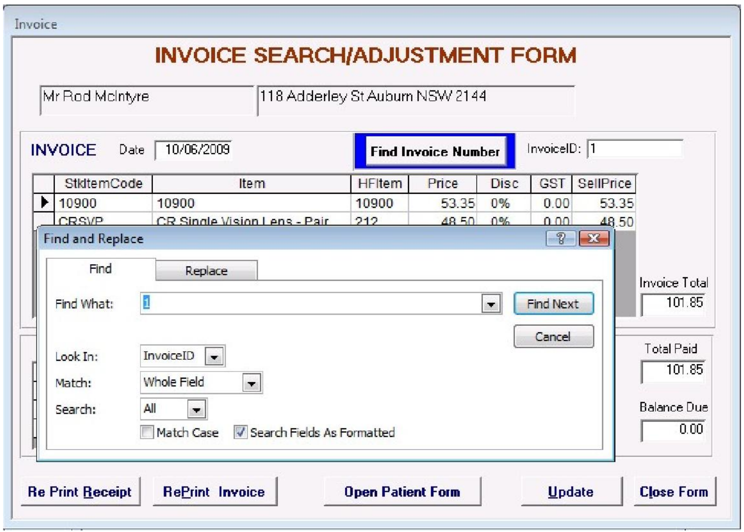
Process Other Recalls compiles the Other Recalls and presents the letters report for preview prior to printing. Again you will be asked for date parameters as mentioned above. NB: The printout can be set to A4 or A5 paper.

GLOBAL INVOICE SEARCH / ADJUSTMENT

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



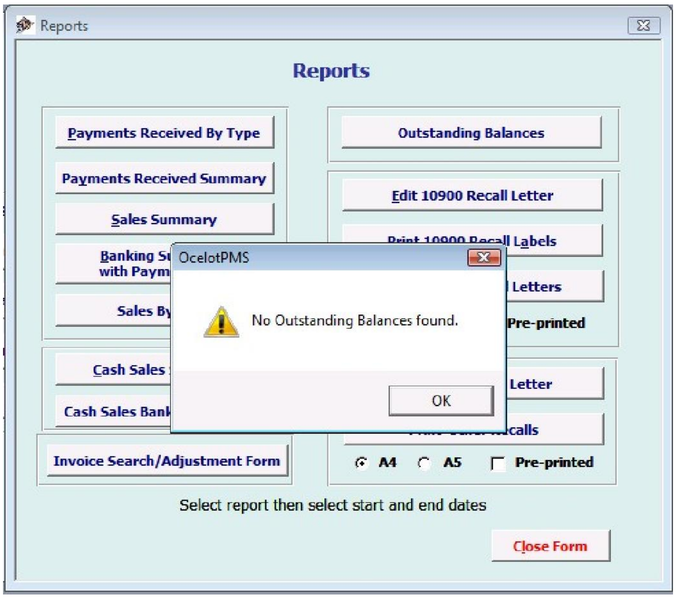
To search or adjust an **Invoice** the first thing you must do is click the **Find Invoice Number** button, the **Find and Replace** screen will show on the screen and the cursor will be focused in the Find What box. You need to enter the Invoice ID of an invoice you want to search for in this box and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



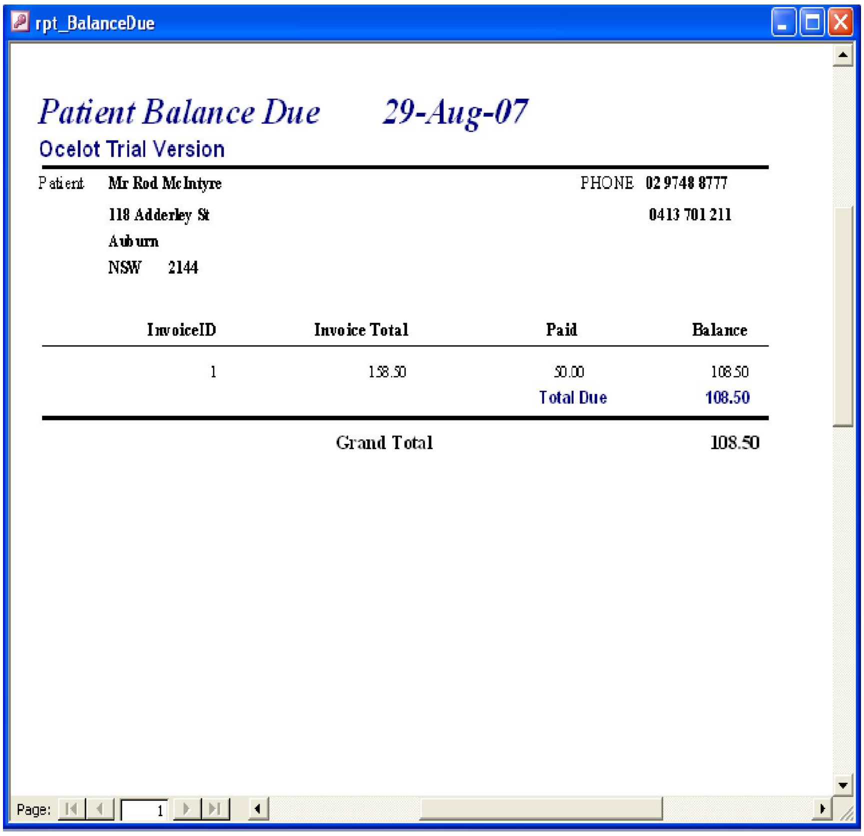
After locating the required invoice click the cancel button, you can edit the form as per the standard invoice screen, including reprinting if necessary.

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.



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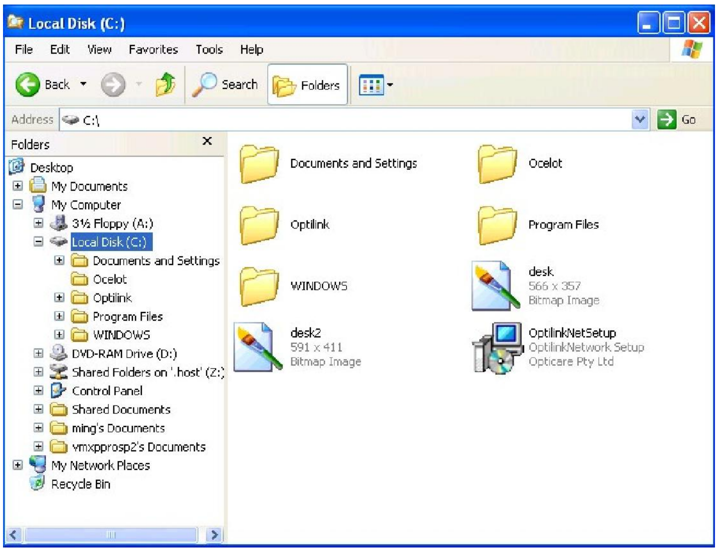
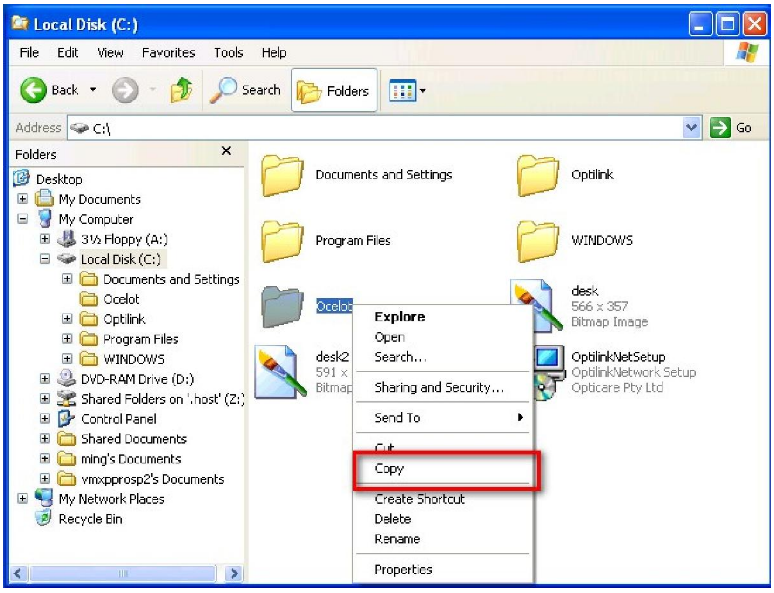
Backing Up Ocelot

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!*

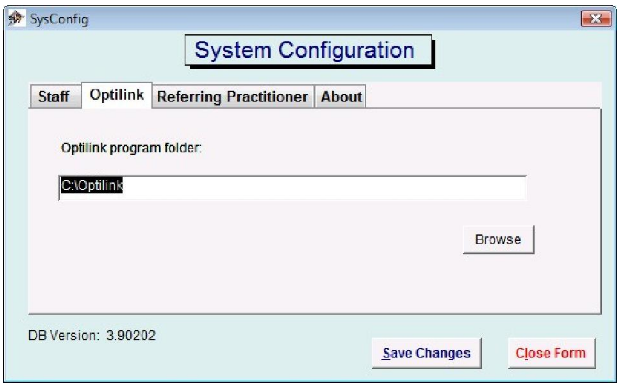
Right click on the USB key drive and select **paste**. This will paste a copy of the Ocelot folder and files to the removable drive.

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.

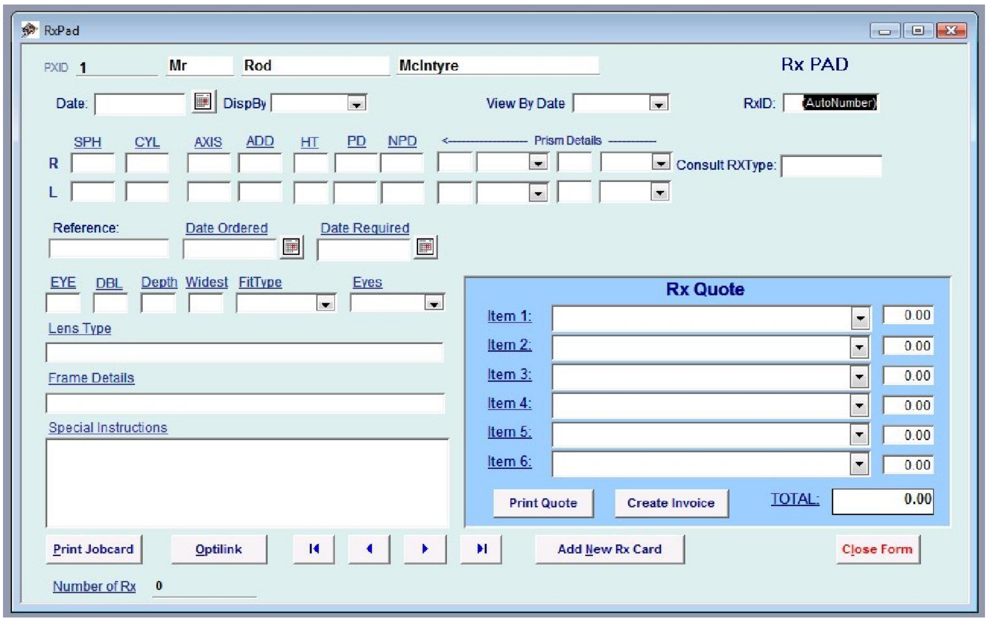
When you have completed your backup it is a good idea to rename the folder on your USB key drive, a good name to use is simply the date of the backup. You can also zip the folder to save disk space. As you create more backups you can delete your old backups or copy them to CD.

Sending Jobs Via OPTILINK

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



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

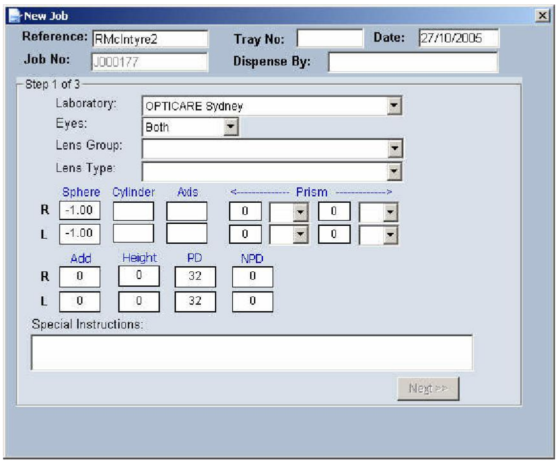


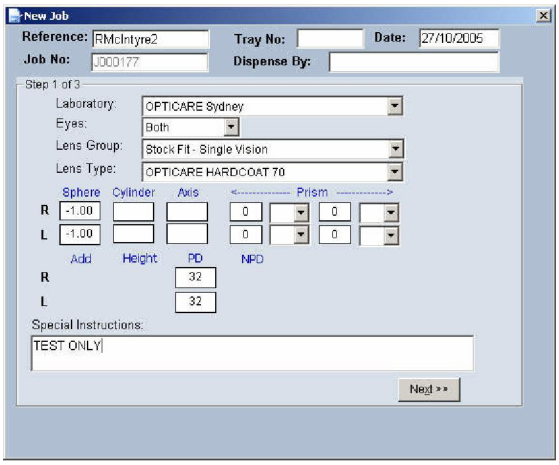
Sending job

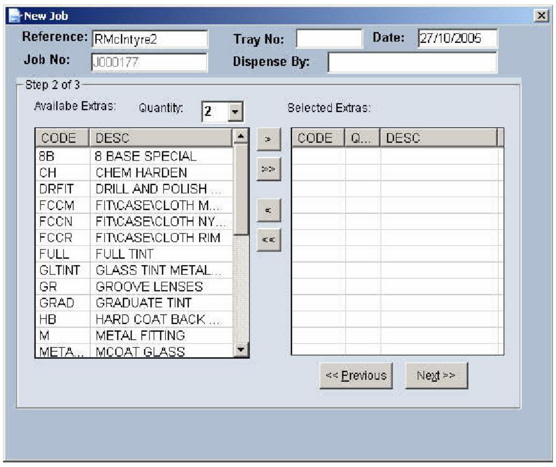
You can find an Optilink button in RxPad screen. After filling required fields for a job, click the **Optilnk** button to transfer job data to Optilink.

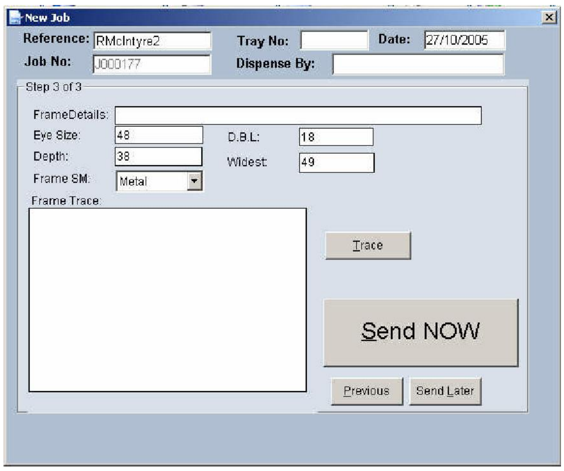
Clicking **OK** button on the job create finished window starts Optilink.

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.









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