

## Pre-Screening in OptoMize V4

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## *Purpose of this Document*

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This document is intended for screeners to guide them in carrying out the pre-screen tasks required in OptoMize V4.

Other documents that may be relevant to screeners include:

UG0xx - OptoMize V4 Clinical Tasklist Icons

UG073 - Photography in OptoMize V4

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## General Information

In this document the word *click* will be used during certain steps, unless otherwise specified this refers to a left click with the mouse.

When working through the pre-screen process, you may be asked to click on the **[Next]**, **[Finish]**, **[Cancel]** or **[Back]** button. These are located in the top left hand corner of the screen (figure 1).

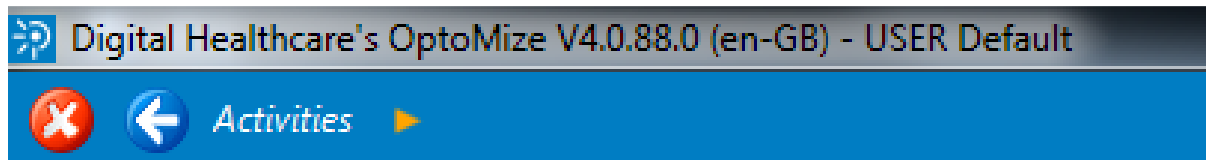



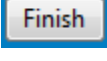


Figure 1

-  This is the **[Cancel]** button
-  This is the **[Back]** button
-  This is the **[Next]** button
-  This is the **[Finish]** button (not shown in figure 1, will appear in place of **[Next]** button where relevant)

## Listing Patients for Screening

When patients attend for screening, the first task is to carry out pre-screening of the patient.

- You can display a list of patient attending on that day from the *Main Activities screen* shown in figure 2.

**Note:** The *Main Activities Screen* may look slightly different to figure 2 depending on the role that has been assigned to you.

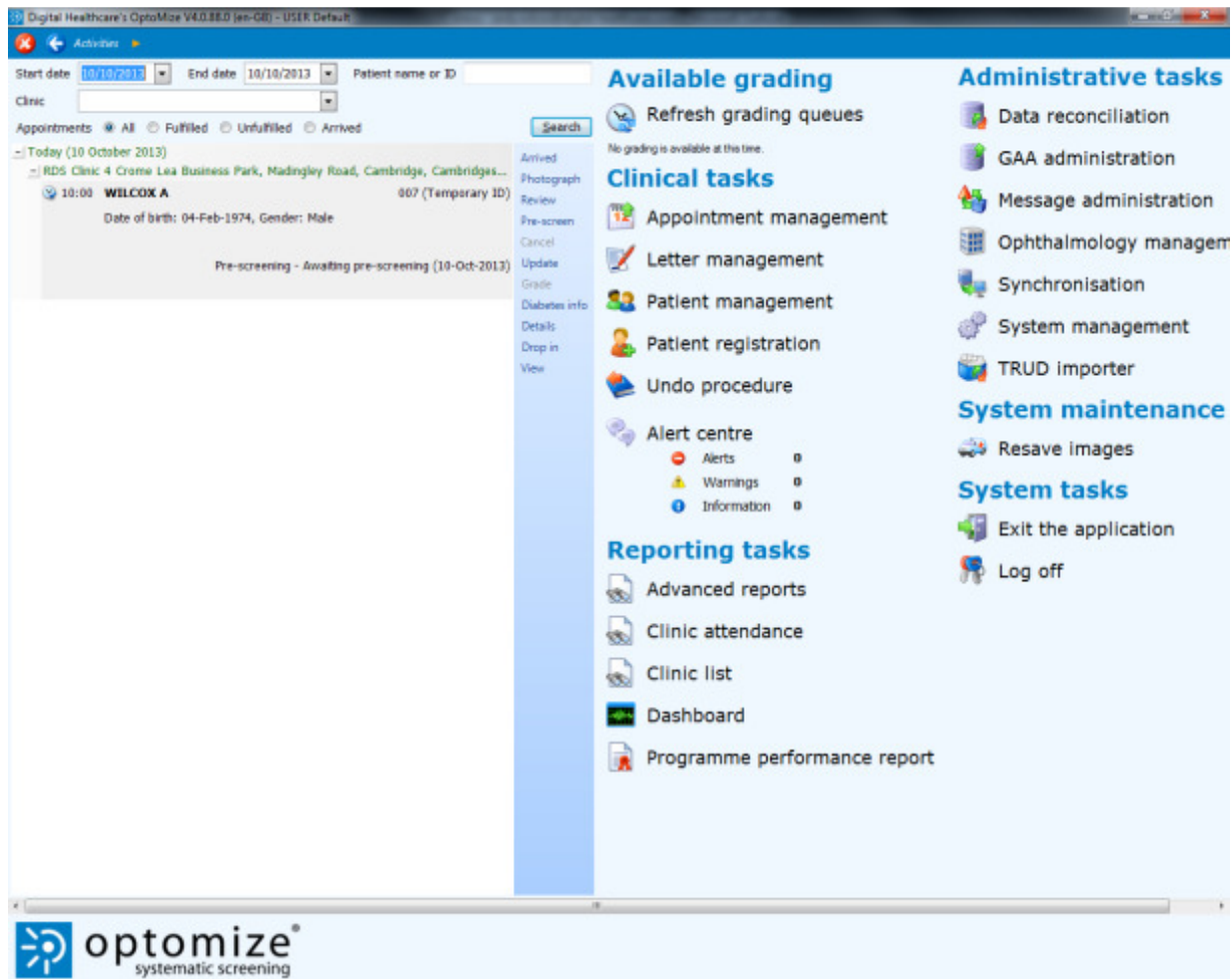


Figure 2

- To identify the patients to be screened you can use the search filter section. This is located towards the top left of the screen and shown in figure 2.

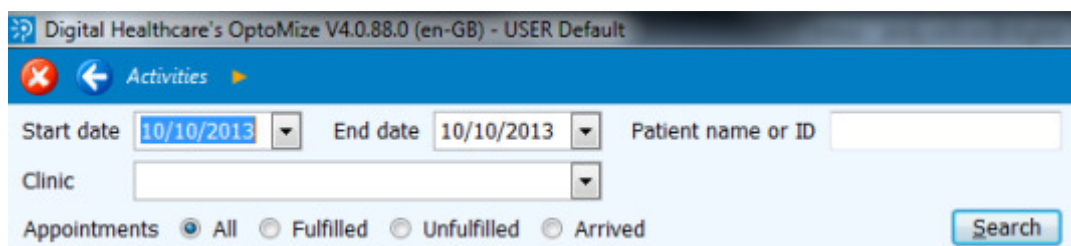








Figure 3

- You can restrict the search to specific dates using the start date and end date drop down boxes and clicking on the **[Search]** button.
- You can search for a specific patient by entering a name or ID in to the text box and clicking on the **[Search]** button.
- You can narrow the list of patients displayed to show either:
  - All Appointments
  - Fulfilled Appointments
  - Unfulfilled Appointments
  - Patient who have arrived
- You can filter by specific clinics, choose the clinic from the drop down list
- Select the radio button corresponding to the type of appointments you want to view and click on the **[Search]** button.

When you have performed the search, a list of patients will be displayed. Each patient has an icon to the left of their appointment time; the most relevant icons have the following meanings:

-  - Patient has an unfulfilled appointment
-  - Patient has been seen but not photographed
-  - Images have been taken for the patient
-  - The encounter has been assessed
-  - Patient has been marked as having arrived

 **Note:** Refer to user guide *UG0xx OptoMize V4 Clinical Tasklist Icons* for a full list of icons and their meanings.

When you have identified the list of patients, the next step is to choose the patient and carry out the pre-screen.

- Highlight the relevant patient who is being pre-screened and click on the *pre-screen* link to the right of the patient list (shown in figure 4).

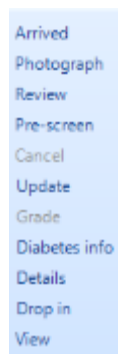



Figure 4

 **Note:** The pre-screen link will be greyed out for patients whose images have been assessed. Until primary grading has been completed you will be able to perform the pre-screen and photography options repeatedly on a patient.

## Gaining Patient Consent

- After clicking on pre-screen you will be taken to the *Pre-screening: Confirm Patient* screen shown in figure 5.

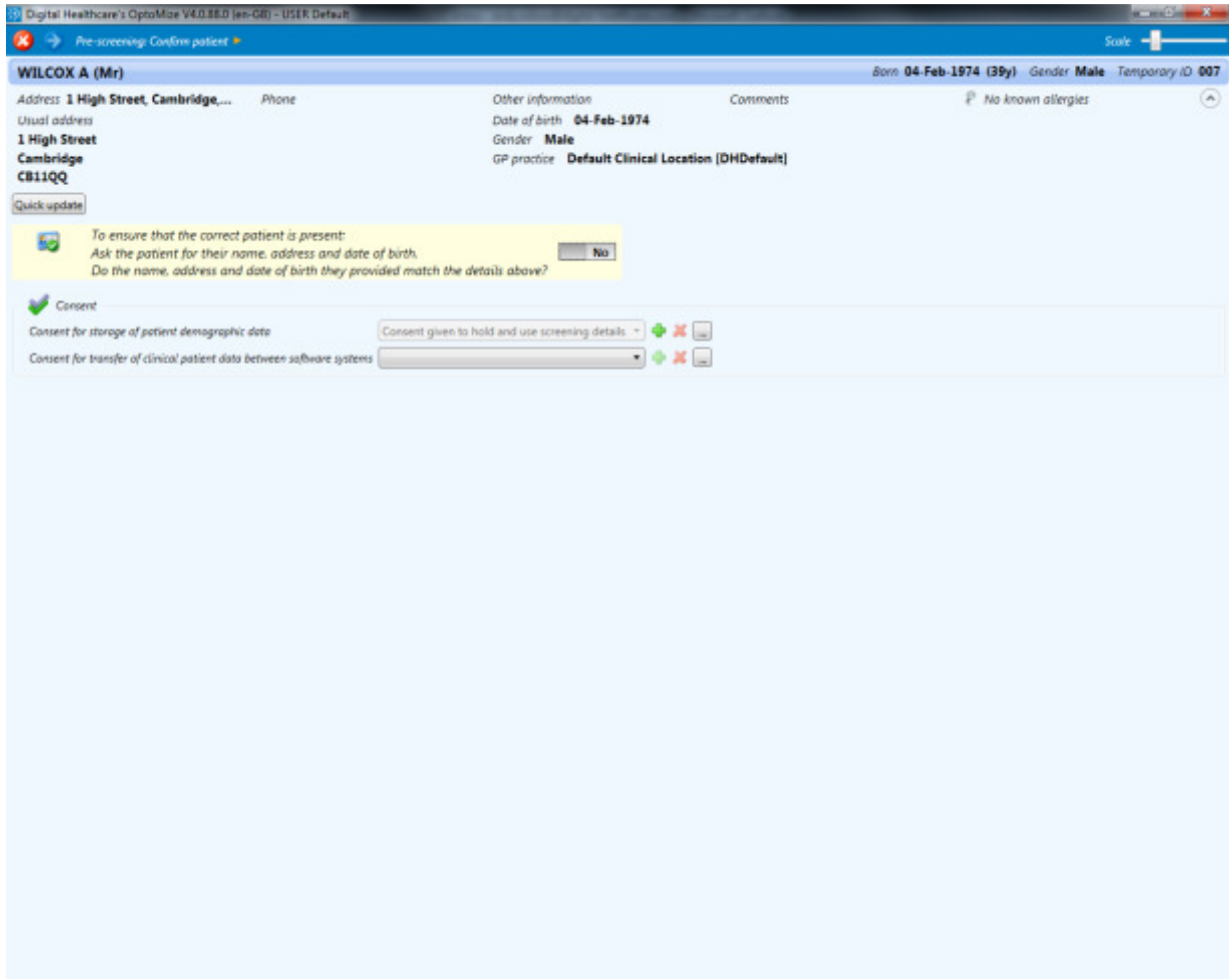


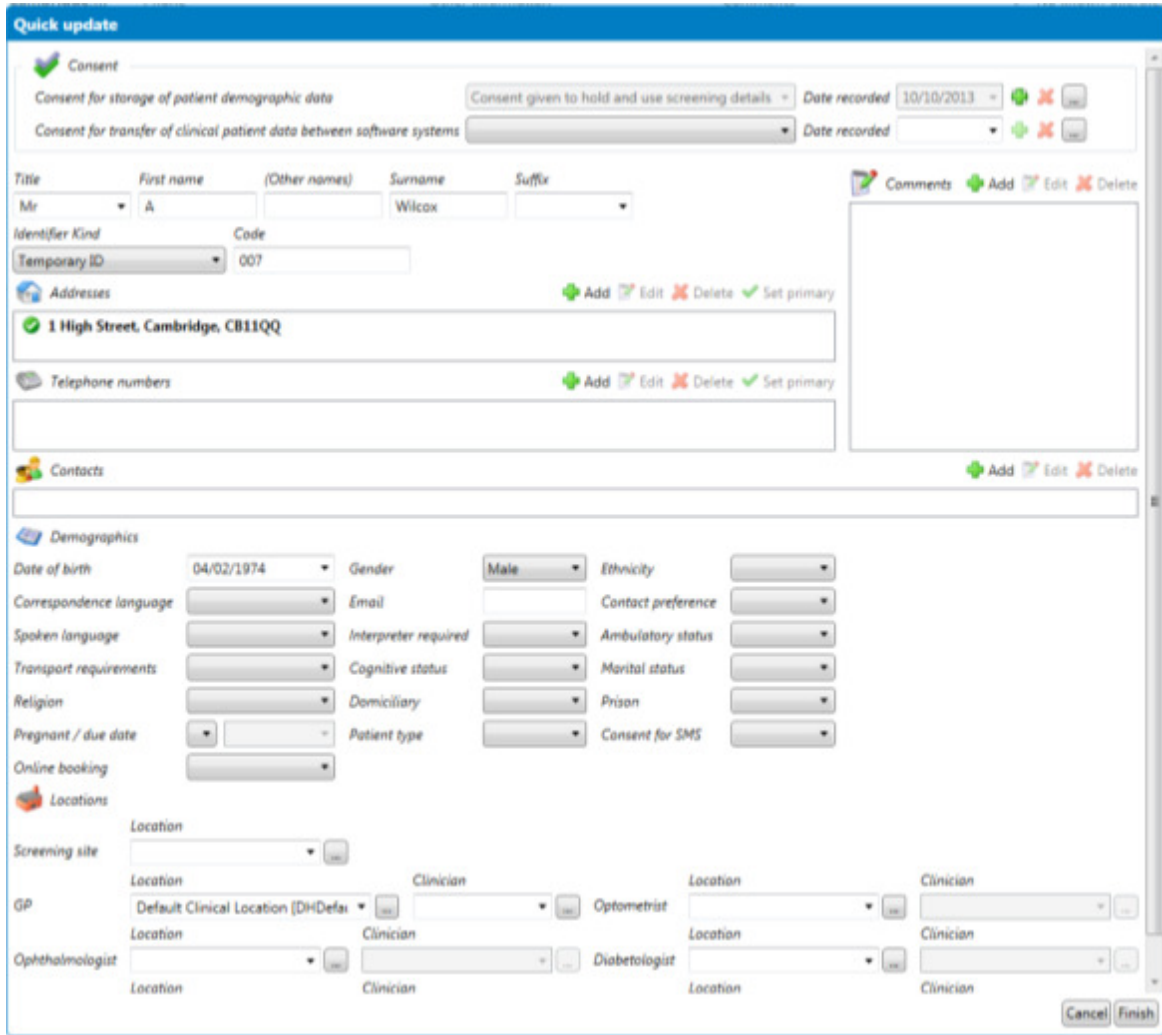
Figure 5

- At this stage you will need to ask the patient to confirm their identity and gain their consent for carrying out the procedures.

**Note:** This screen may have slightly different options on depending on your configuration. The action of gaining or denying consent is still the same and gaining consent will allow you to move on to the next section.

## Updating Patient Details

- If there are inaccuracies in the patient information, you are able to carry out a quick update of the main patient information. Click on the **[Quick Update]** button to change details, the screen shown in figure 6 will appear.



**Quick update**

**Consent**

Consent for storage of patient demographic data ☐ Consent given to hold and use screening details ☒ Date recorded 10/10/2013

Consent for transfer of clinical patient data between software systems ☐ Date recorded

**Demographics**

Title  First name  (Other names)  Surname  Suffix

Identifier Kind  Code

Temporary ID  007

**Addresses**

1 High Street, Cambridge, CB11QQ

**Telephone numbers**

**Contacts**

**Demographics**

Date of birth  04/02/1974  Gender  Male  Ethnicity

Correspondence language  Email  Contact preference

Spoken language  Interpreter required  Ambulatory status

Transport requirements  Cognitive status  Marital status

Religion  Domiciliary  Prison

Pregnant / due date  Patient type  Consent for SMS

**Locations**

Screening site

GP  Location  Clinician  Optometrist  Location  Clinician

Ophthalmologist  Location  Clinician  Diabetologist  Location  Clinician

Figure 6

- Make amendments as necessary and click on the **[Finish]** button.
- When you have gained consent and made any updates if required, click on the **[Next]** button to proceed to the next step.

## Entering Pre-Screening Details

The next screen is the *Pre-Screening: Enter Pre-Screening Details* screen and is shown in figure 7.

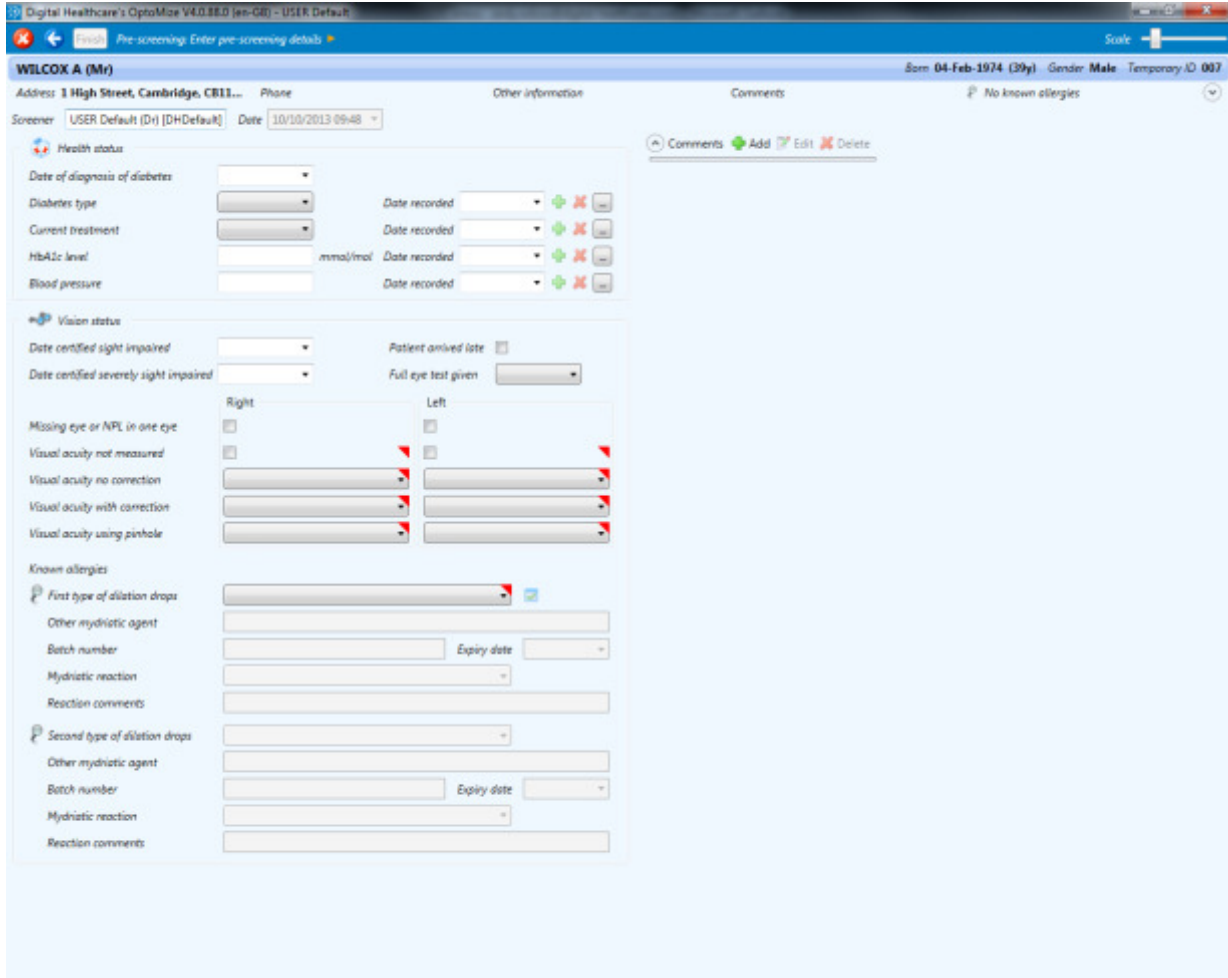



Figure 7

 **Note:** Compulsory information will be marked with a red corner on the relevant field.

 **Note:** If a patient is marked as having an allergy to any type of dilation drops, the *Known allergies* section will be marked with a red box and detail of which drops the patient is allergic to.

 **Note:** You only have to enter one Visual Acuity reading for each eye from any of the options.

- Enter information in the text fields and choose the relevant options from the drop down boxes as necessary.
- If you want to add any notes relating to the patient, proceed to the *Adding Notes* section of this document.
- When you have finished the pre-screen, click on the **[Finish]** button.
- If you want to cancel the pre-screen without saving any changes, click on the **[Cancel]** button.
- If you want to return to the *Patient Consent* screen, click on the **[Back]** button.

You can use the quick fill button to automatically enter the batch number and expiry date of the first mydriatic agent that was last used by the particular user.

- Click on the quick fill button to the right of the *Type of dilation drops* box to automatically populate the batch number and expiry date field.



## Adding Notes

If you want to add some additional information during the pre-screen, click on the add button at the bottom of the screen (figure 8).



Figure 8

The *comments* screen will be displayed (figure 9).

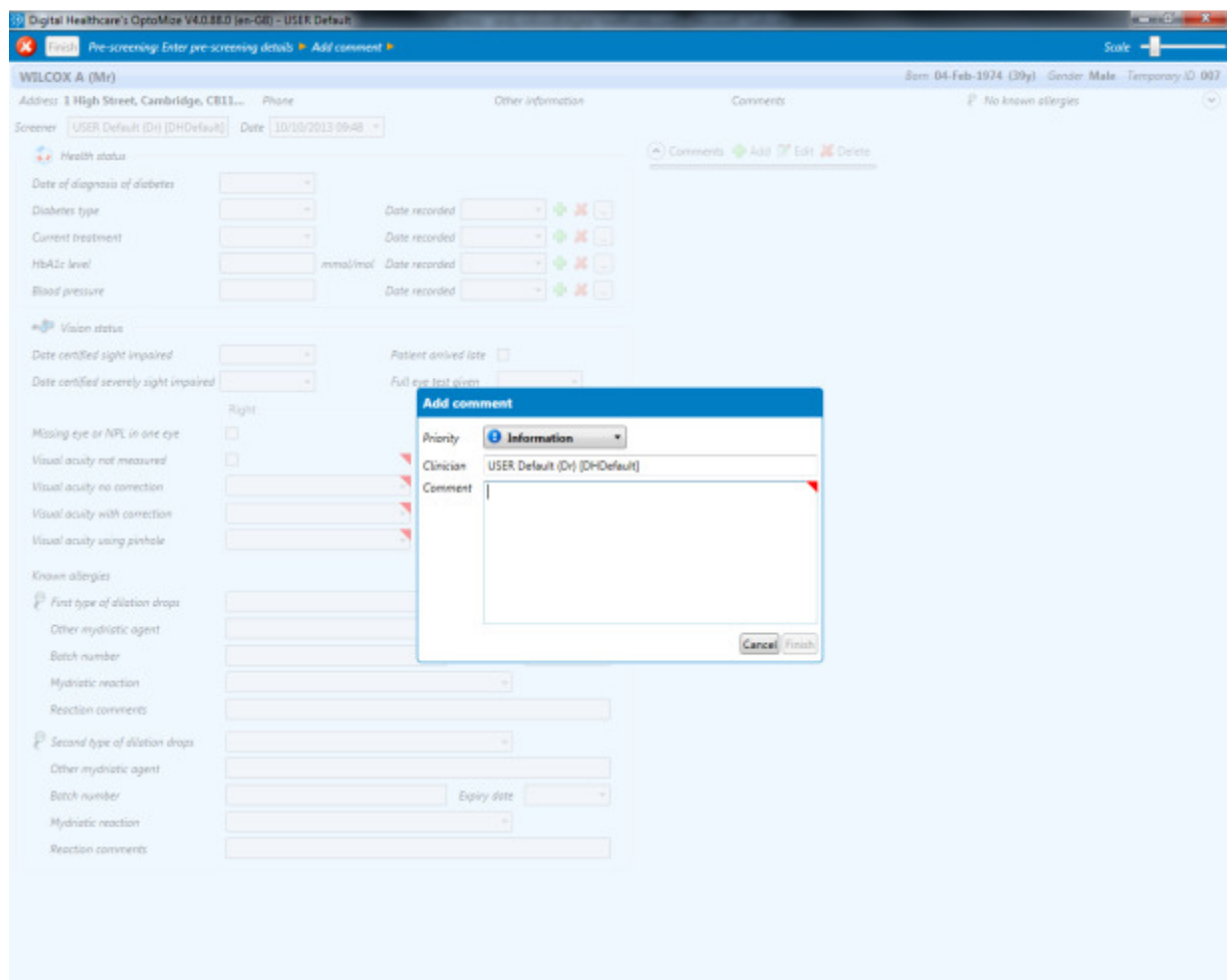


Figure 9

- To add a new note, type your notes into the box that appears and click on the **[Finish]** button (figure 10).

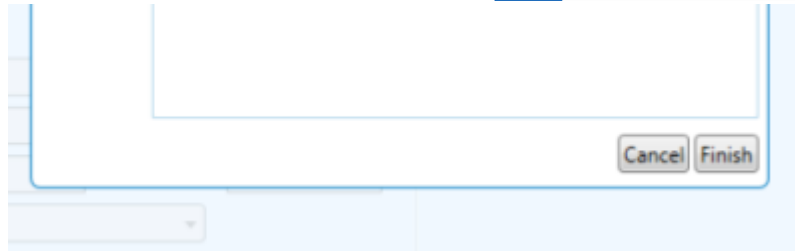


Figure 10

- When you have entered the notes you can either go back to the *Enter Pre-screening Details* or complete the pre-screen by clicking on the **[Finish]** button.

## Drop In Patients

If a patient is not scheduled for a screen but is referred in at short notice you can add them to the queue for screening.

- To add a drop in patient, click on the *drop in* link to the right of the patient list (figure 12)

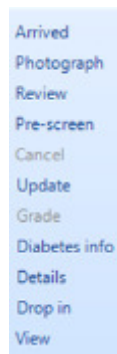


Figure 12

- Type in some information to identify the patient and click on the **[Search]** button, a list of patients that match the search criteria will be displayed (figure 13).

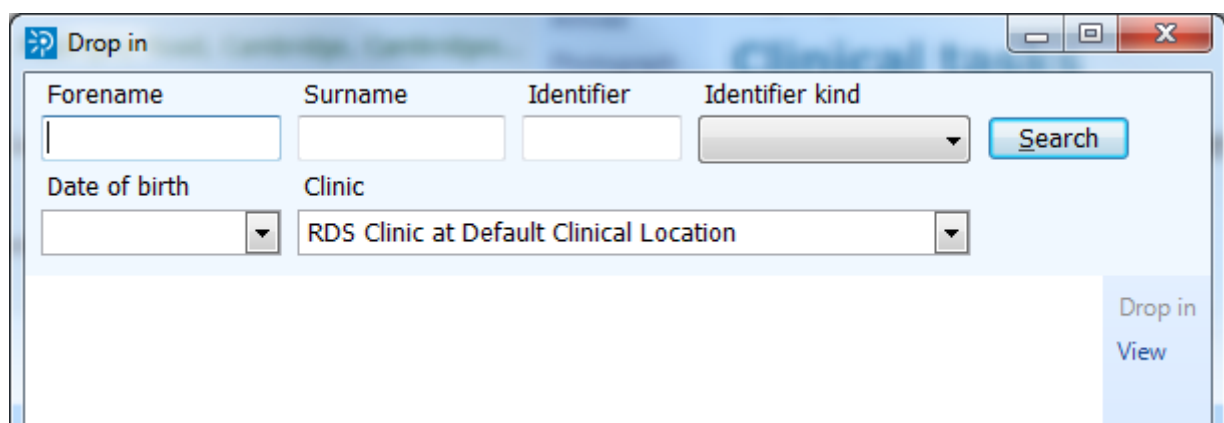


Figure 13

- When you have identified the drop in patient, highlight them and click on the *drop in* link on the right hand side of the window.
- The patient will be added to the queue and you can proceed through the pre-screen process.

## Changing the Display Layout of the Patient List

You can change the way the list of patients are displayed in the *Main Activities* screen (figure 14)

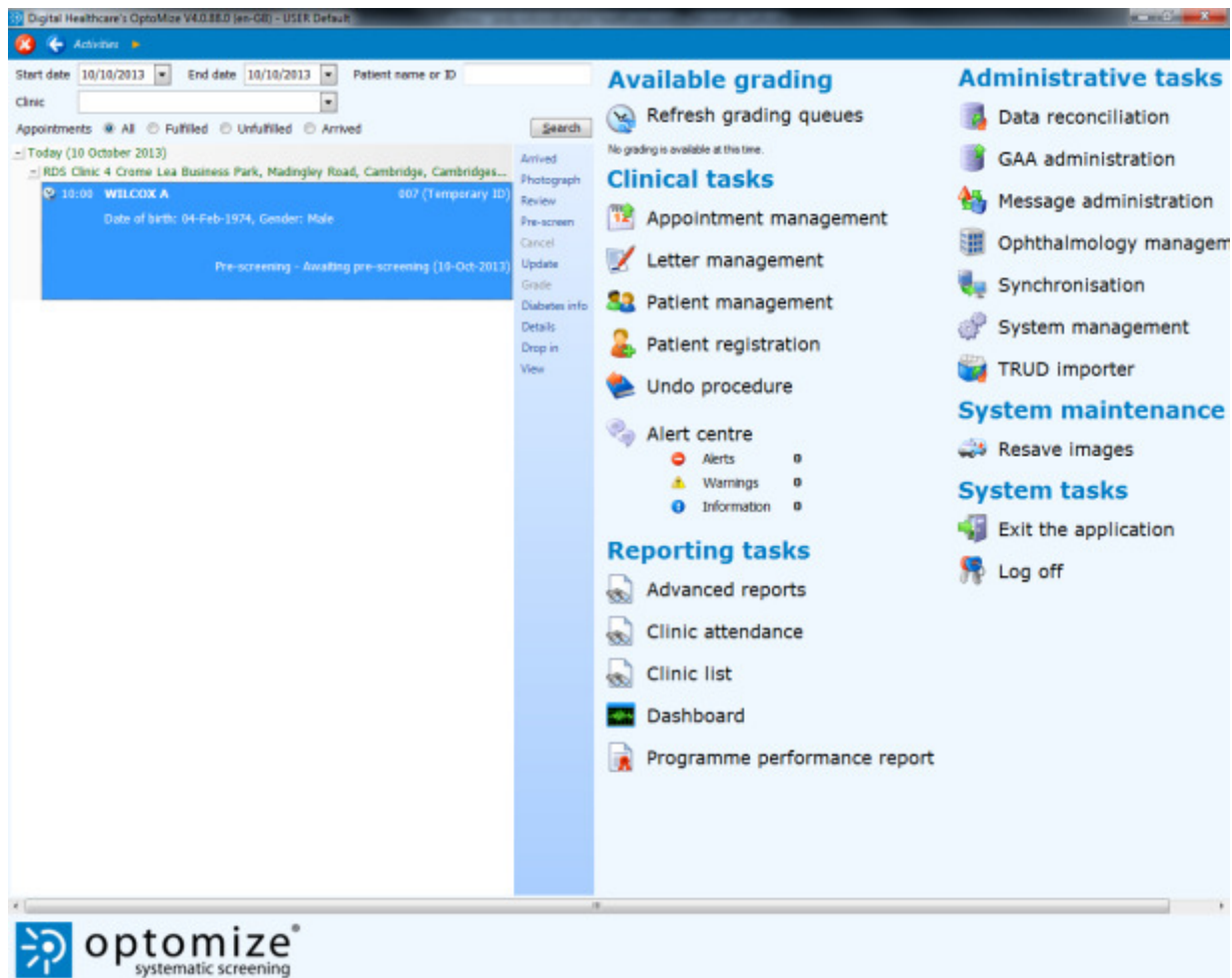


Figure 14

- Click on the *view* link to the right of the patient list.
- From the pop up list choose the view option that you would like to use (figure 15)

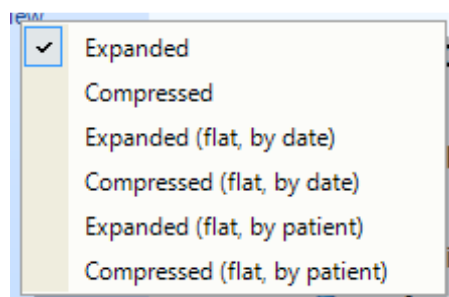


Figure 15

- Expanded – This is the default display and will show patients with details underneath.
- Compressed – This will display only patient name, ID number and date of birth.
- Expanded (flat, by date) – This will display patients in the expanded format with no appointment date/clinic grouping, organised by date.

- Compressed (flat, by date) - This will display patients in the compressed format with no appointment date/clinic grouping, organised by date.
- Expanded (flat, by patient) – This will display patients in the expanded format with no appointment date/clinic grouping, organised by patient.
- Compressed (flat, by patient) - This will display patients in the compressed format with no appointment date/clinic grouping, organised by patient.