ExamWRITER

Getting Started Guide

October 2008

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Installing & Activating ExamWRITER

In this chapter:

Notes	
	• Before you install and activate ExamWRITER, review the System Specifications located at www.officemate.net/pdfs/system specifications.pdf.
	• The OfficeMate Suite (OfficeMate, ReportWRITER, and ExamWRITER) installation time will vary depending on the programs that you are installing and the speed of your computer.
	• Complete the installation steps in this document on each computer from which you plan to run ExamWRITER.
	• If you are upgrading from ExamWRITER 5.x to 8.x, ensure that you have read the ExamWRITER 5.0, 5.1, 6.4, and 7.0–7.4 Enhancement documents located at www.officemate.net/support_ex_resources.aspx. In order for you to understand and use all of the new features that were implemented in each ExamWRITER version, you must read each version's enhancement list.

Installing & Activating for Existing Users Using an Access Database

This section tells you how to install and activate ExamWRITER if you are an existing ExamWRITER user using an Access database, including how

Notes	
	• If you are upgrading from ExamWRITER 6.x or 7.x to 8.x, the templates that you previously created will need to be reprocessed due to changes that were made to the Quick Code functionality. After you upgrade to ExamWRITER 8.x you must open the templates that you created using previous ExamWRITER versions and reselect and reprocess all of the information in those templates. For more information on editing templates, see the *ExamWRITER Getting Started Guide*
	• If you are upgrading from ExamWRITER 5.x to 8.x, the information already recorded in exams that you copy forward to ExamWRITER 8.x will need to be reprocessed due to changes that were made to the Quick Code functionality. After you upgrade to ExamWRITER 8.x you must open the exams that you copy forward using previous ExamWRITER versions and reselect and reprocess all of the information in those exams. For more information on recording information in exams, see the *ExamWRITER Getting Started Guide.*
	• If you are upgrading from ExamWRITER 5.x to 8.x, the templates that you created using ExamWRITER 5.x will be deleted because they will contain obsolete data. New enhancements to ExamWRITER data formats and content will not allow you to convert version 5.x templates to version 8.x templates. After you upgrade to ExamWRITER 8.x you must recreate your templates. Open the **EWTemplate.rtf** file that is located in the OMATE32/DATA folder to view a text copy of the templates that you previously created. For more information on creating new templates, see the *ExamWRITER Getting Started Guide.* If you copy forward an exam or open a closed exam in ExamWRITER 8.x, you may get a template obsolete warning message; if you receive this message you must edit the exam to correct the issue.

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▶ To install ExamWRITER

For more information on backing up your data, see the "Backing Up & Restoring Data (Access Databases)" document at www.officemate.net.

1 **Protect your practice: BACK UP YOUR DATA!**

2 Close ExamWRITER and all other applications on all computers and restart each computer and server (if applicable).

3 If you are installing ExamWRITER in a networked environment, ensure that you are logged into the network as a user with full local administrative access rights.

4 Disable all anti-virus and screen saver programs that are running on your computer(s).

Note	Complete steps 5–16 on each computer from which you plan to run ExamWRITER.

5 Insert the **Complete Program CD**.

The OfficeMate Suite splash screen opens.

Note	If the OfficeMate Suite splash screen does not automatically open, navigate to and double-click on the setup.exe file on the CD-ROM drive.

6 Click **Install OfficeMate Suite**.

The InstallShield Wizard begins.

7 Read the warning about installing OfficeMate 8.0, which contains the new CMS 1500 form, and click **Next**.
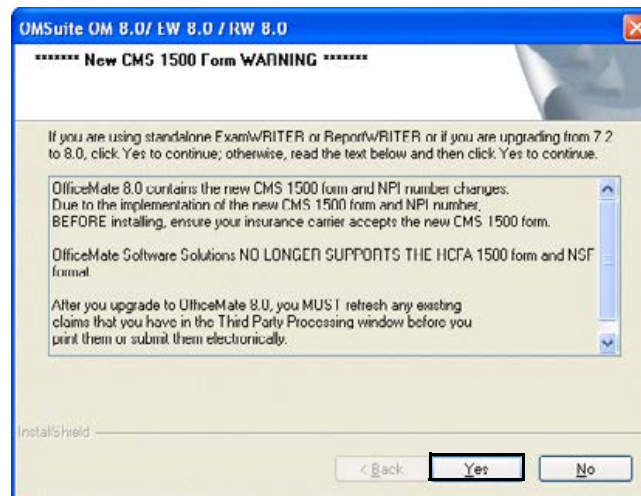
8   Click **Next**.
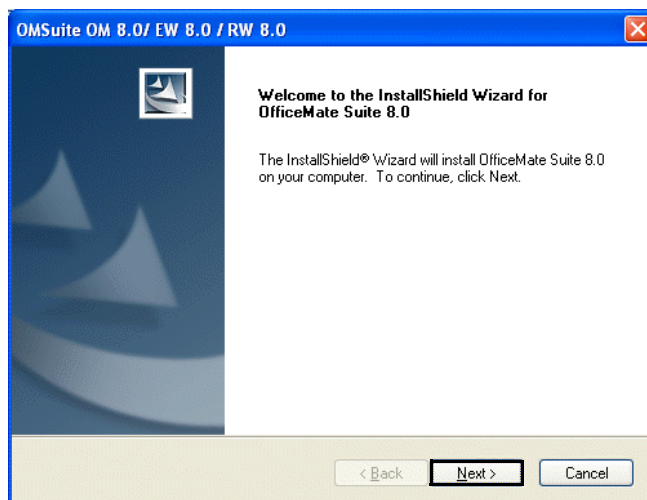
9   Read the warning message to prevent installation errors and click **Next**.
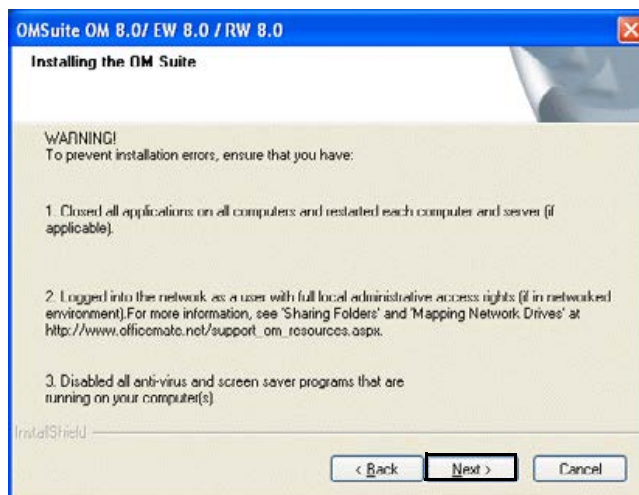
10   Click **Yes** to accept the License Agreement.
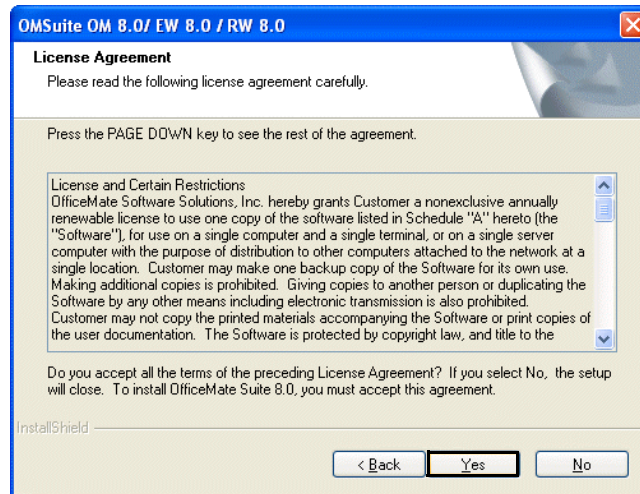
11   Select **ExamWRITER** and any other OfficeMate Suite programs that you are licensed to install and that you want to install on the computer and click **Next**.
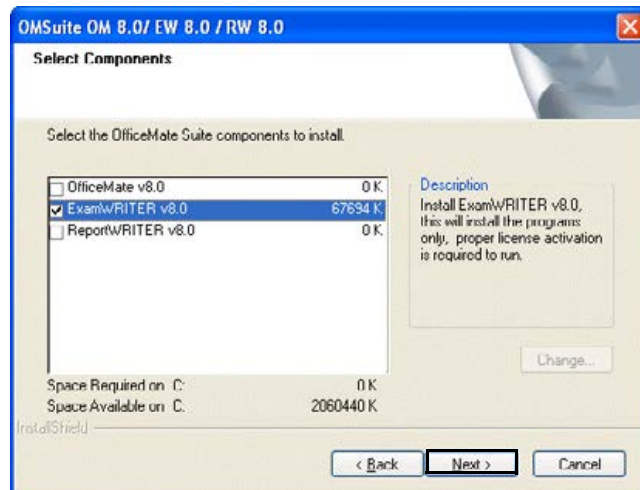
Note	If you are licensed to install multiple products, but you did not select those products in step 11, the following message appears notifying you that all of the products for which you are licensed will be installed.

12   Click **Next**.

The installation begins. Depending on the programs that you are installing and the speed of your computers, the installation time will vary.

After the installation is complete, the 3D-EYE DRAW window opens to begin the ExamDRAW installation process.

13   Select the **Modify** radio button and then click **Next**.

14   Click **Next**.

The ExamDRAW installation begins.

15   Click **Finish**.

16   Click **Finish**.

Your computer reboots.

Note	Remember to complete steps 5–16 on each computer from which you plan to run ExamWRITER.

▶   **To activate ExamWRITER**

Notes	• If you received an Activation CD with your upgrade packet, follow the instructions in this section; otherwise, skip this section.
	• You only need to activate ExamWRITER on one computer. You do *not* need to activate ExamWRITER on every computer on which it is installed.

1   Insert the **Activation CD** after you install ExamWRITER and reboot the computer.

The activation begins.

2   Click **OK**.

▶ To convert existing ExamWRITER (OPIS-CPR) 3.4.x data

If you want to convert your existing ExamWRITER (OPIS-CPR) data into new ExamWRITER data, follow the instructions below; otherwise, *skip this section*.

Note	• The conversion utility processing time can range from several minutes to several hours. Do not stop the utility while it is processing, even if it appears not to be responding.
	• Your existing ExamWRITER (OPIS-CPR) data may be corrupted. If you convert corrupted data, some of your exam data may be missing. OfficeMate makes every attempt to accurately convert your data; however, it does not guarantee a 100 percent accurate data conversion and therefore suggests using your existing ExamWRITER (OPIS-CPR) data as history files and your new ExamWRITER data as active patient records.
	• Any exams that were created prior to January 1, 2000, will not be converted.
	• Any exams that were active before you converted your existing ExamWRITER (OPIS-CPR) data into new ExamWRITER data will be closed after the conversion. Although all of the converted exams will be closed, you will still be able to review and make changes to them.
	• After you convert your existing ExamWRITER (OPIS-CPR) data into new ExamWRITER data, the location of providers associated with exam records will be displayed in the exam record under the Notes heading in the Reason for Visit section. All new exams that are created after the conversion will display provider names in the Provider column in the ExamWRITER Control Center.
	• If you convert your data more than one time, your current records and data *will* be overwritten with existing data from the BIDEAS folder. If you think that you need to reconvert your data, call OfficeMate Client Services at 1.800.942.5353.

1   Open ExamWRITER (OPIS-CPR).

2   Finalize exams and run the End of Day process.

3   Close ExamWRITER (OPIS-CPR) and all other ExamWRITER and OfficeMate programs on all of your computers.

4   **Protect your practice: BACK UP YOUR DATA!**

5   Navigate to the **OMATE32** folder and double-click **EWConvertDATA.exe**.

6   Select one or more of the **Conversion Options** and then click **Run**.

7   If the **Exams found** window opens, click **Yes** to continue converting your data.

Note	If you click **Yes**, all exams that were found will be overwritten.

8   After the utility is finished running, save, print, or close the log file.

▶ To convert existing ReportWRITER (OPIS) 3.4.x data

If you want to convert your existing ReportWRITER (OPIS) correspondence and patient data into new ReportWRITER data, follow the instructions below; otherwise, *skip this section*.

Note	The conversion utility process can take several minutes. Do not stop the utility while it is processing, even if it appears not to be responding.

1   Close ReportWRITER (OPIS) and all other OfficeMate Suite programs on all of your computers.

2   **Protect your practice: BACK UP YOUR DATA!**

3   Navigate to the **OMATE32** folder and double-click **EWConvertDATA.exe**.

4   Select one or more of the **Conversion Options** and then click **Run**.

5   After the utility is finished running, save, print, or close the log file.

▶ To open ExamWRITER after installing & activating

❖   Open ExamWRITER using one of the following methods:

–   Double-click on the ExamWRITER icon on your desktop.

–   Click **Start**, select **Programs**, select **OfficeMate Software Solutions**, and select **ExamWRITER**.

Notes	• After you install, activate, and open ExamWRITER for the first time, a database conversion may automatically start converting and updating your ExamWRITER database files.
	• To view a comprehensive list of the new features and expanded functionality in ExamWRITER, click **Help** on the main window toolbar and select **What's New?**

Installing & Activating for Existing Users Using a SQL Database

This section tells you how to install and activate ExamWRITER if you are an existing ExamWRITER user using a SQL database, including how

For more information on backing up your data, see the "Backing Up & Restoring Data (SQL Databases)" document at www.officemate.net.

▶ To install ExamWRITER

1 **Protect your practice: BACK UP YOUR DATA!**

2 Close ExamWRITER and all other applications on all computers and restart each computer and server (if applicable).

3 If you are installing ExamWRITER in a networked environment, ensure that you are logged into the network as a user with full local administrative access rights.

4 Disable all anti-virus and screen saver programs that are running on your computer(s).

Note	Complete steps 5–16 on each computer from which you plan to run ExamWRITER.

5 Insert the **Complete Program CD**.

The OfficeMate Suite splash screen opens.

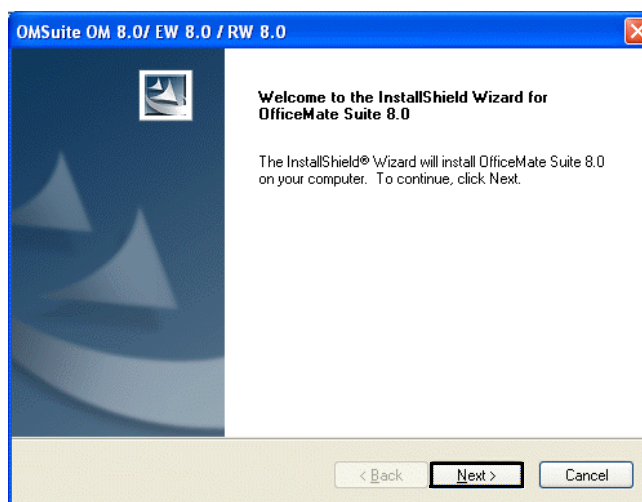| Note	If the OfficeMate Suite splash screen does not automatically open, navigate to and double-click on the setup.exe file on the CD-ROM drive.

6 Click **Install OfficeMate Suite**.
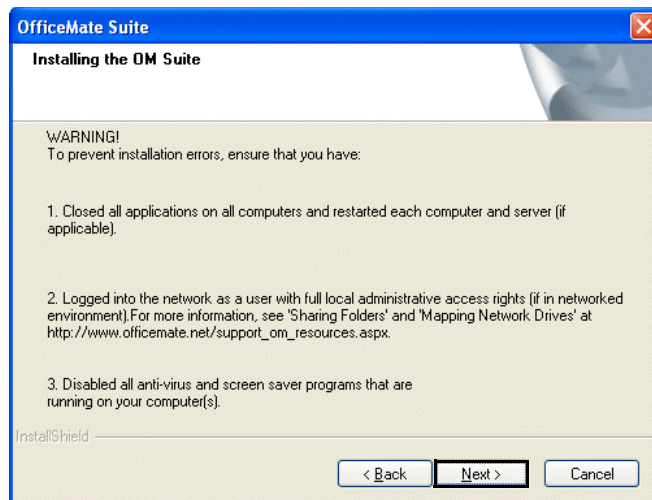
7 Click **Workstation Install**.

The InstallShield Wizard begins.
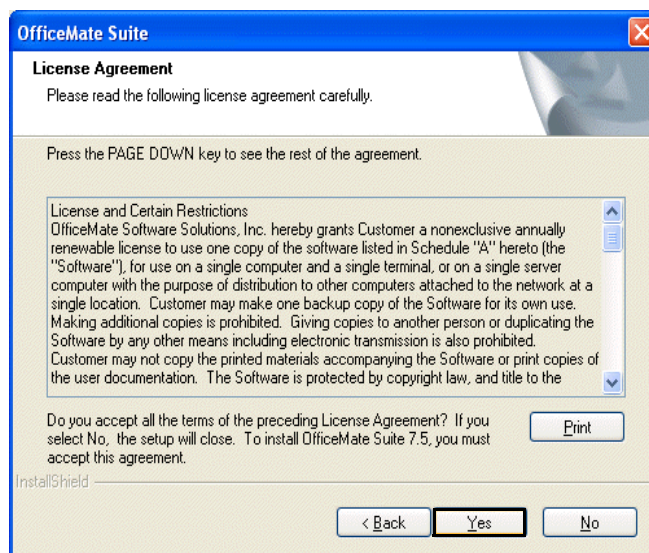
8 Click **Next**.

9   Read the warning message to prevent installation errors and click **Next**.

10   Click **Yes** to accept the License Agreement.

11   Select **ExamWRITER** and any other OfficeMate Suite programs that you are licensed to install and that you want to install on the computer and click **Next**.

12   Click **Next**.

The installation begins. Depending on the programs that you are installing and the speed of your computers, the installation time will vary.

After the installation is complete, the 3D-EYE DRAW window opens to begin the ExamDRAW installation process.

13   Select the **Modify** radio button and then click **Next**.

14   Click **Next**.

The ExamDRAW installation begins.

15   Click **Finish**.

16   Click **Finish**.

Your computer reboots.

Note	Remember to complete steps 5–16 on each computer from which you plan to run ExamWRITER.

▶   To activate ExamWRITER

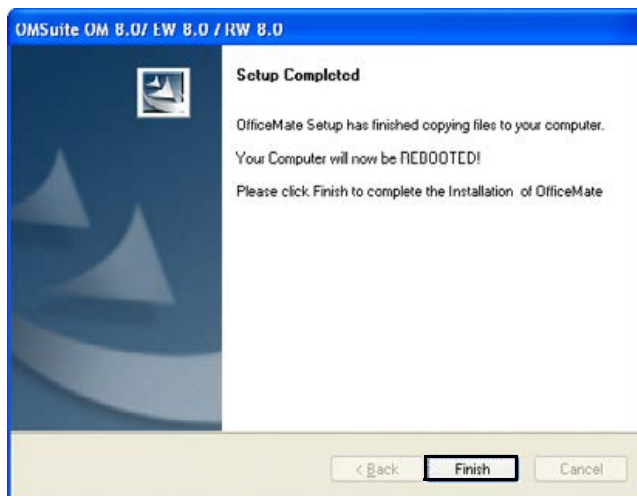| Notes	• If you received an Activation CD with your upgrade packet, follow the instructions in this section; otherwise, skip this section.
	• You only need to activate ExamWRITER on one computer. You do *not* need to activate ExamWRITER on every computer on which it is installed.

1   Insert the **Activation CD** after you install ExamWRITER and reboot the computer.

The activation begins.

2   Click **OK**.

▶   To open ExamWRITER after installing & activating

Open ExamWRITER using one of the following methods:

•   Double-click on the ExamWRITER icon on your desktop.

•   Click **Start**, select **Programs**, select **OfficeMate Software Solutions**, and select **ExamWRITER**.

Note	To view a comprehensive list of the new features and expanded functionality in ExamWRITER, click **Help** on the main window toolbar and select **What's New?**

Installing & Activating for New Users

This section tells you how to install and activate ExamWRITER if you are a new ExamWRITER, including how

▶   To install ExamWRITER

Note	If you are using ExamWRITER in a networked environment, contact your network administrator to enable ExamWRITER to share data files in a network and to map your office computers to a shared network drive. Your network administrator must follow the installation process below:
	3 Install ExamWRITER on your server. You must install the program and data on your server, even if it is a dedicated server, because the installation program does not separate the program and data installations.
	4 Share the OMATE32 folder to allow one copy of the ExamWRITER database to be shared with all of your office's client computers.
	5 Map network drives on client computers to allow each computer in your networked environment to access the server or computer where your ExamWRITER data files are stored.
	6 Install ExamWRITER on client computers.

1   If you have an OfficeMate Suite demonstration program installed on your computer(s), follow the instructions below to uninstall it; otherwise, go to step 3.

Note	ExamWRITER will not operate properly on your computer(s) unless you completely uninstall all OfficeMate Suite demonstration programs.

   a.   Click **Start**.

   b.   Select **Settings**.

   c.   Select **Control Panel**.

   d.   Select **Add or Remove Programs**.

   e.   Select the OfficeMate Suite demonstration program that you have installed on the computer and click **Remove**.

   f.   After the program is removed from the computer, delete the OMATE32 folder and all of its components.

   g.   Repeat steps a–f on each computer on which you have an OfficeMate Suite demonstration program installed.

2   Close all applications on all computers and restart each computer and server (if applicable).

3   If you are installing ExamWRITER in a networked environment, ensure that you are logged into the network as a user with full local administrative access rights.

4   Disable all anti-virus and screen saver programs that are running on your computer(s).

Note	Complete steps 5–17 on each computer from which you plan to run ExamWRITER.

5   Insert the **Complete Program CD**.
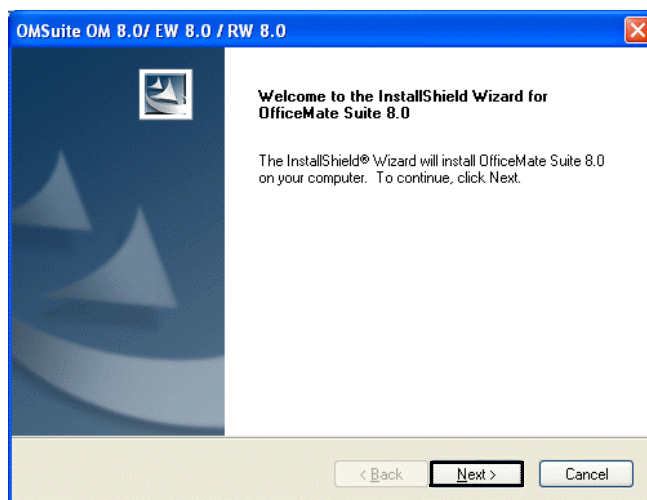
The OfficeMate Suite splash screen opens.

Note	If the OfficeMate Suite splash screen does not automatically open, navigate to and double-click on the setup.exe file on the CD-ROM drive.

6   Click **Install OfficeMate Suite**.
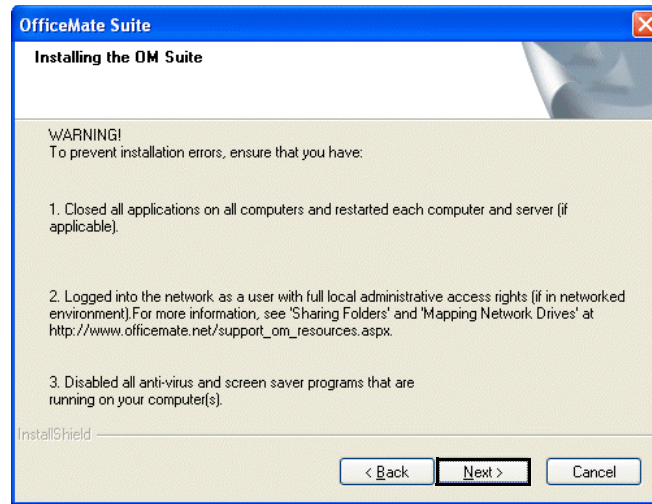
7   Click **Workstation Install**.
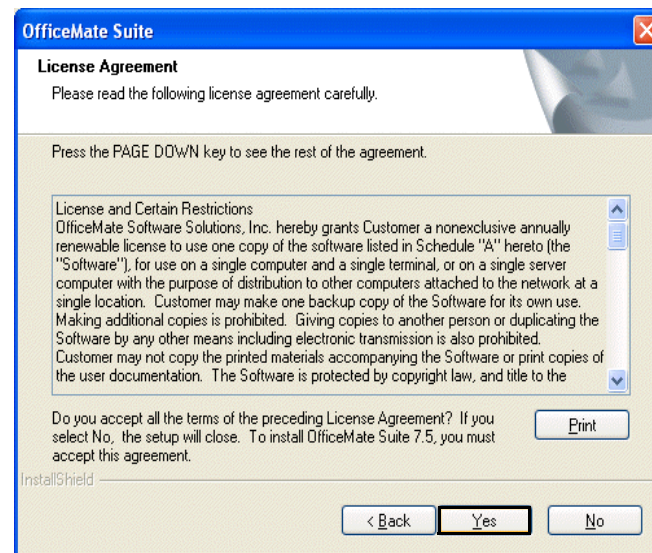
The InstallShield Wizard begins.

8   Click **Next**.

9   Read the warning message to prevent installation errors and click **Next**.
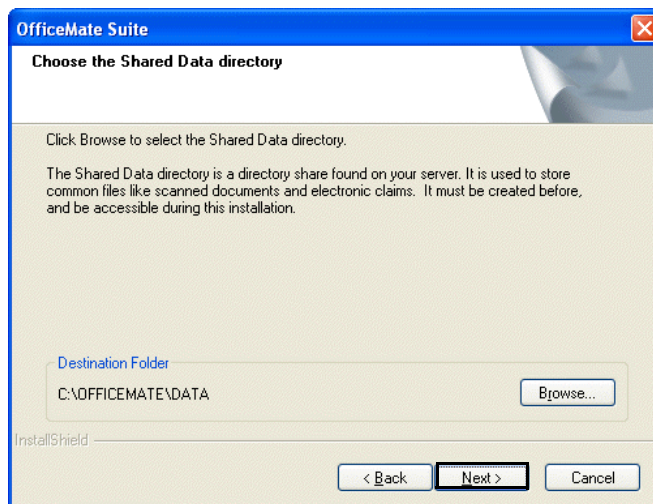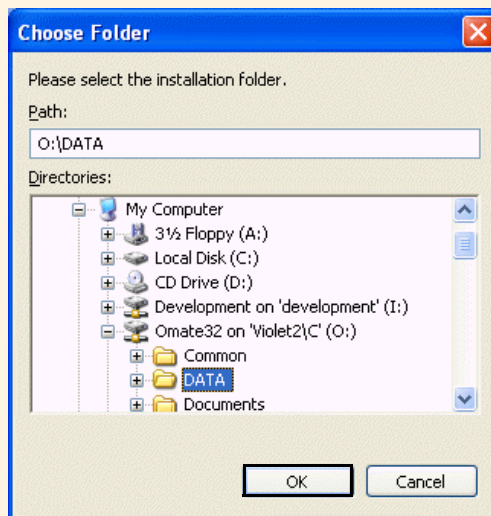

10   Click **Yes** to accept the License Agreement.

11   Choose a destination for your data and click **Next**.

Note	If you are installing ExamWRITER on a client computer, ensure that you have shared your OMATE32 folder, click **Browse**, navigate to the mapped drive letter that contains the shared DATA folder on the server, and click **OK**.

12 Select **ExamWRITER** and any other OfficeMate Suite programs that you are licensed to install and that you want to install on the computer and click **Next**.
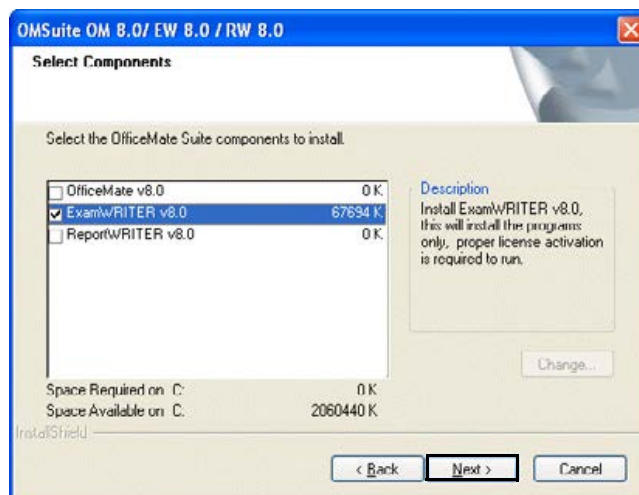
13 Click **Next**.
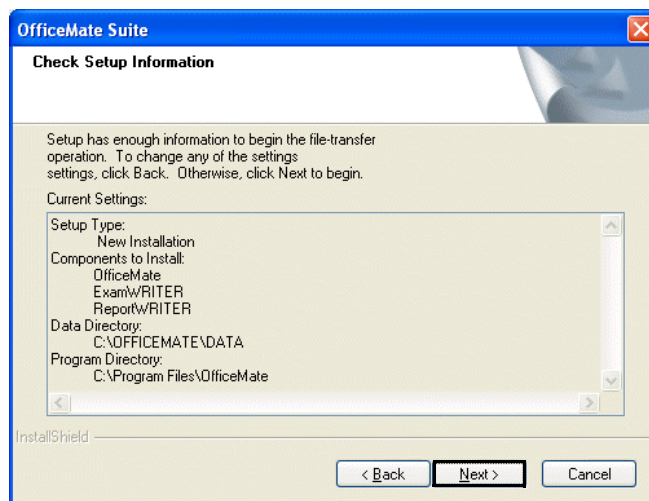
The installation begins. Depending on the programs that you are installing and the speed of your computers, the installation time will vary.

The 3D-EYE DRAW window opens to begin the ExamDRAW installation process.

14 Click **Next**.
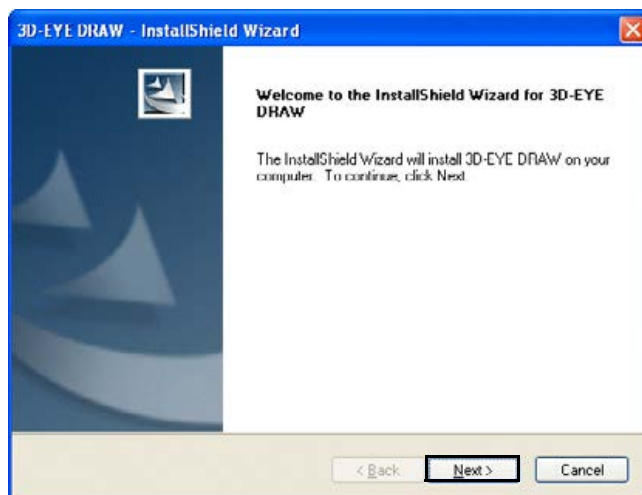
15 Select the **Complete** radio button and then click **Next**.
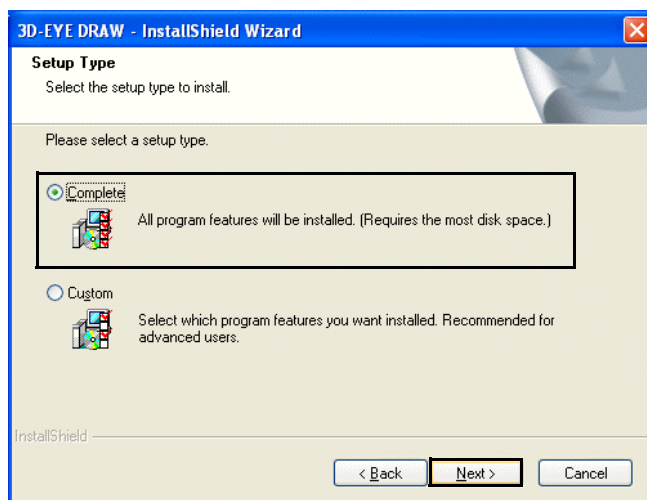
16   Click **Install**.

The ExamDRAW installation begins.

17   Click **Finish**.

Your computer reboots.

Note	Remember to complete steps 5–17 on each computer from which you plan to run ExamWRITER.

▶ To activate ExamWRITER

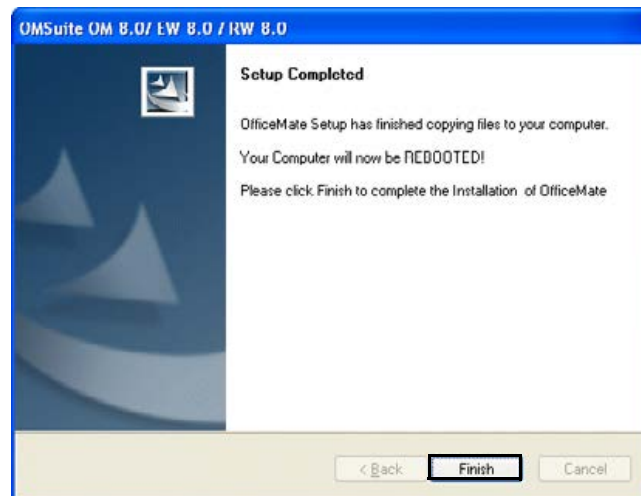| Note	You only need to activate ExamWRITER on one computer. You do *not* need to activate ExamWRITER on every computer on which it is installed.

1   Insert the **Activation CD** after you install ExamWRITER and reboot the computer.

The activation begins.

2   Click **OK**.

▶ To open ExamWRITER after installing & activating

Open ExamWRITER using one of the following methods:

•   Double-click on the ExamWRITER icon on your desktop.

•   Click **Start**, select **Programs**, select **OfficeMate Software Solutions**, and select **ExamWRITER**.

Note	To view a comprehensive list of the new features and expanded functionality in ExamWRITER, click **Help** on the main window toolbar and select **What's New?**

CHAPTER 2

Getting Started

In this chapter:

Choosing ExamWRITER to record and store your electronic medical records (EMRs) is the first step in creating a fully automated medical practice. This guide will show you how to use ExamWRITER to create, modify, and view EMRs.

Finding More Information

In addition to the *ExamWRITER Getting Started Guide*, documentation for ExamWRITER also includes the following training:

- *iTrain Training and Demonstrations.* These Internet-based, prerecorded training and demonstration videos should be viewed by all ExamWRITER users. Go to http://www.officemate.net and view the following core ExamWRITER training sessions:
    - OSSU 100 Tutorials - Setting Up ExamWRITER
    - OSSU 600 Tutorials - Using ExamWRITER

- *OfficeMate Software Solutions University (OSSU).* These Internet-based, one-hour training courses should be taken by all ExamWRITER users to focus on specific training topics such as documenting pretests, documenting exams, completing exams, and using templates. To register for OSSU classes, call 800.269.3666 and select option 3 and then option 1, or go to www.officemate.net.

- *OfficeMate Knowledge Base.* This searchable online knowledge base allows you to read helpful articles about ExamWRITER and submit questions that are answered by knowledgeable OfficeMate staff members. Go to http://www.officemate.net/omkb/ to browse the OfficeMate Knowledge Base.

ExamWRITER Overview

Your ExamWRITER software creates customized EMRs that manage all of your patient information in a secure database that is easy to modify and use. This section includes the following topics:

- New Features, 26
- Explanation of Interface Elements, 31
- Explanation of Navigation Schemes, 33

New Features

The following is a brief summary of the new features in ExamWRITER:

- Ability to select and add modifiers to procedure codes.

- Ability to view only the PQRI procedure codes by selecting the PQRI radio button in the Diagnosis/Procedure Coding window.

- Ability to automatically populate procedure codes in the Selected Procedures table in the Diagnosis/Procedure Coding window. Based on your exam selections, ExamWRITER will automatically populate the Selected Procedures table. If the procedure codes are cleared, click Auto Code to repopulate the Selected Procedures table.

- Ability to click the Quick Code button in the Diagnosis/Procedure Coding window and open the E & M Quick Code Check window and reference quick code information.

- Ability to accurately and automatically determine the level of medical code documentation (based on the Evaluation and Management Services Guide by the Centers for Medicare & Medicaid Services (CMS)) needed for billing purposes on new exams. The check box selections that you record in a patient's exam record that relate to 99xxx procedure codes are tallied and recorded in the Documented Elements row on the E&M Quick Code Check window.

- Ability to quickly visually note what elements you have documented, what elements you have not documented, what E&M code you have already selected in the Diagnosis/Procedure Coding window (if applicable), and what alternate E&M code you can bill based on the elements that you have already documented (if applicable) on the E&M Quick Code Check window.

- Ability to click on the HPI heading on the E&M Quick Code Check window and open the History of Present Illness window and record additional history information.

- Ability to click on the PFSH heading on the E&M Quick Code Check window and open the Medical History window and record additional history information.

- Ability to click the Diag/Mgmt heading on the E&M Quick Code Check window and open the Impressions/Assessment window and record additional exam impressions.

- Ability to click Coding on the E&M Quick Code Check window and open the Diagnosis/Procedure Coding window and record and modify coding information.

- Streamlined content on the Reason for Visit window more accurately documents patients' reasons for visiting.

- Ability to select Chief Complaint as your default exam view.

- Ability to record custom complaints and timeline information. HPI information is no longer included on the Chief Complaint window; instead, there is a separate HPI category bar and window for documenting a patient's history.

- The new Ocular Complaint window improves the accuracy and quality of ocular complaint documentation and makes the technician's job of documenting complaints worry-free with the new HPI Wizard.

- When selected on the Patient History window, disposition and orientation information is recorded under the Examination category bar, per Medicare requirements.

- Ability to easily document a patient's Medical History, Ocular History, Systemic Surgery, and Ocular Surgery history from within one window by clicking the appropriate radio buttons in the top right corner of the window and opening appropriate history selections.

- Ability to easily document a patient's Ocular and Systemic family history from within one window by clicking the appropriate radio buttons in the top right corner of the window and opening appropriate family history selections.

- Ability to document operative reports on the Surgery window.

- The pachymetry impressions have been moved from the Pachymetry recording window to a new Pachymetry window under the Special Testing category bar.

- Ability to click on the blue Rx Notes flags and open the Rx window and view the contact lens trial and final Rx notes and spectacle final and alternate Rx notes.

- New selection options in the Vision/Rx window.

- Ability to automatically populate procedure codes on the Diagnosis/Procedure Coding window based on your manifest prescription (and not your final prescription).

- Ability to view the most recent lab order on all tabs in the Spectacle Rx and Contact Lens Rx windows.

- Ability to print the final spectacle Rx on the Spectacle Rx window's Final tab.

- Ability to easily record a 180 axis measurement for spectacle and contact lens prescriptions.

- Ability to clear all visual acuities that have been previously recorded for an Rx on the Spectacle Rx and Contact Lens Rx windows.

- Ability to select a disinfecting regimen from the Disinfecting drop-down menu on the Contact Lens window's Final tab, which will print on the final and trial Rx.

- Ability to print the final contact lens Rx on the Contact Lens window's Final tab.

- Ability to record multiple final contact lens prescriptions on the Final tab.

- Ability to view the most recent final spectacle Rx from a prior exam (if one does not exist in the current exam) and copy it to the trial Rx on the Contact Lens window's Trial tab.

- Ability to view a graphical historical display of a patient's keratometry readings.

- Ability to record Examination, Surgery, Test, Consult, and Laboratory orders within the same window by selecting the appropriate radio button.

- Ability to customize orders on the Orders window by pressing the F12 key and adding, editing, and deleting orders on the Code Maintenance window.

- Ability to select an eye for an order on the Orders window from the Eye drop-down menu.

- Ability to easily record an order on the Order's window for today by selecting the Today check box.

- Ability to save orders without timelines or action information on the Order's window by selecting the Save WITHOUT Timeline and Action Date check box.

- Ability to open the Orders window anytime during an exam by pressing the F3 key.

- Ability to open the Medication Order window anytime during an exam by pressing the F6 key.

- Ability to record a medication's expiration date in the Expiration Date field on the Medication Order window. The expiration date automatically populates to one year from the date of the order for all refill medication orders.

- Ability to print prescriptions with or without a provider's signature on the Medication Order window.

- Ability to view discontinue information, discontinue dates, and allergy information in the Medication Hx table on the Medication Order window.

- Separation of the Examination and Special Testing category bars on the renamed Exam - Special Tests tab.

- Ability to automatically populate procedure codes in the Diagnosis/Procedure Coding window based on your examination and special test selections.

- Ability to document ophthalmic tests on the Special Testing window.

- Ability to accurately document refractive surgery on the Refractive Surgery window.

- New Cataracts, Gonioscopy, and Optic Nerve Cupping ExamDRAW template options.

- New ExamDRAW interface that allows you to more easily and accurately create a wide variety of drawings.

- Ability to view text automatically generated in ExamDRAW based on the diseases added to the drawing on the Autotext tab.

- Ability to add comments to drawings in ExamDRAW.

- Ability to view a historical record of a patient's drawings in ExamDRAW by moving the white slider bar to the desired date on the timeline or pressing your keyboard's left and right arrow keys.

- Ability to copy drawings from a previous date forward to the current date to modify and record them on the current date in ExamDRAW.

- Ability to delete drawings in ExamDRAW.

- The new Images - Drawings tab contains a category bar that, when clicked, opens the eDocuments window and allows you to view, add, edit, and delete electronic documents attached to the exam record. All images and drawings from ExamDRAW and diagnostic equipment will be displayed under this tab.

- Ability to view patient's diagnosis codes (or, problem list) and procedure codes from previous exams on the Exam Hx tab on the Patient Information Center window.

- Ability to add a discontinued date to a medication on the Med/Surgical Hx tab on the Patient Information Center window.

- Ability to view when a patient's exam has been closed or finalized in the Room column on the Patient Quick List window. When a patient's exam has been closed or finalized, the Room column automatically displays the text "CLOSED."

- New Provider (Prov) and Service columns on the Patient Quick List window. The Prov column displays the provider's initials and provider ID (which is also displayed in the ID # box next to the provider's name on the Provider/Staff tab on the Business Names window).

- Ability to view patients in the Patient Quick List window who are assigned to all providers or view patients in the Quick List who are assigned only to the provider logged into ExamWRITER.

- Ability to Print Alternate Spectacle Rx on the Exam Finalization window.

- Ability to Print Trial Contact Rx on the Exam Finalization window.

- Ability to Print Patient Report on the Exam Finalization window.

- New General preferences.

- New Defaults preference allows you to choose whether or not you want ExamWRITER to automatically select the "Unless otherwise noted below:" check box on the Patient History, Review of Systems, External Exam, Slit-Lamp Exam, and Routine Ophthalmoscopy windows.

- Ability to save default provider and staff members' signatures on the Provider/Staff tab on the Business Names window that will print on medical prescriptions.

- New default values on the Medications Maintenance window including substitutions, refills, application, frequency, and duration.

- Medications are now listed at the top of the Patient Systemic Medications window and selections that you have made are now listed at the bottom of the window.

- Ability to add a discontinued date to a medication in the Patient SYSTEMIC Medications table.

- Availability of forty-seven new exam templates.

- Updated auto letter.

- All *new* OfficeMate Suite installations will leverage the SQL database architecture's increased sophistication and speed to record and store patient and exam data. In addition to the OfficeMate Suite, new program installations will include Microsoft SQL Server 2005 Express Edition.

- Ability to more easily open a previous exam from within a currently opened exam.

- Ability to quickly notice if there are contact lens and spectacle lab orders from the ExamWRITER chart window.

- Ability to quickly view the most recent final spectacle and contact lens information under the Patient Management category bar on the Full View tab.

- Business name address is printed on examination records.

- Patients' DOB (date of birth) is printed on medical prescriptions.

- Renamed Surgery - Plan - Mgmt tab.

- Ability to use a scrollbar on the Notes and Addendum windows.

- Ability to view a patient's name suffix when conducting a chart search on the ExamWRITER Control Center window, printing medical prescriptions, and on the blue title bar in ExamWRITER.

- Ability to view a patient's nickname in parentheses on the blue title bar in ExamWRITER.

- The white box in the upper right corner of exams displays addendum information only.

- Updated diagnosis codes in the Customization window.

Explanation of Interface Elements

Figure 2-1 depicts the ExamWRITER main window and ExamWRITER Control Center interface elements.

Main Window Toolbar   Search Button   Patient Quick List
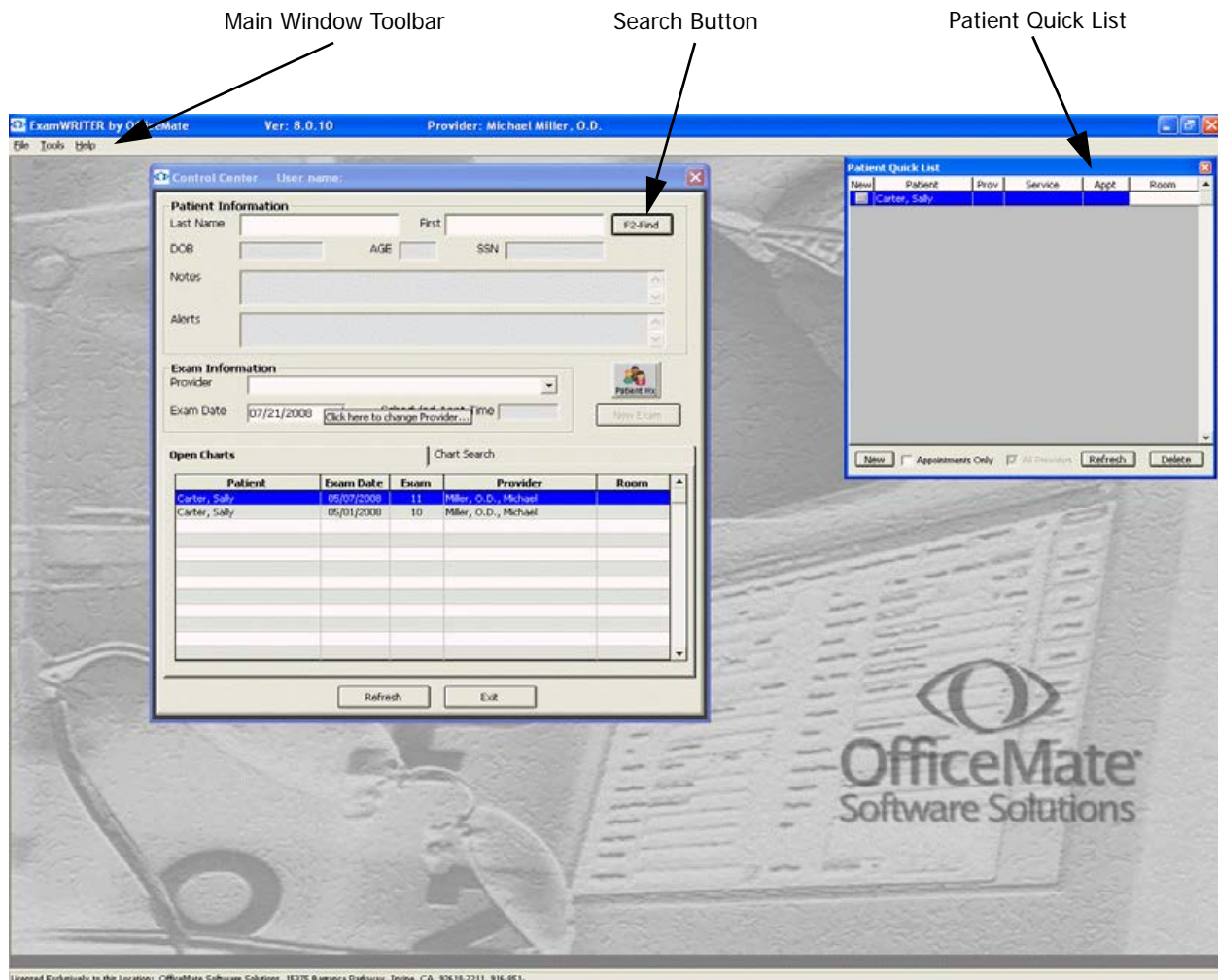
Figure 2-1: ExamWRITER Main Window, ExamWRITER Control Center, and Patient Quick List

Figure 2-2 depicts the ExamWRITER chart window interface elements.

Icons   Category Bars   Scroll Arrows   HIPAA Flag   Tabs

Figure 2-2: ExamWRITER Chart Window

Explanation of Navigation Schemes

ExamWRITER has many unique navigation schemes. OfficeMate highly recommends familiarizing yourself with the ExamWRITER navigation schemes in order to more quickly and efficiently navigate through ExamWRITER and perform tasks.

For more information on navigating in ExamWRITER, see the OSSU 602 "Navigating in ExamWRITER" iTrain.

This section tells you how to use the various navigation schemes in ExamWRITER, including how

▶ **To sort columns**

❖ Click on a column heading to sort the column in ascending order.

Note	Clicking on a column heading a second time will not sort the column in descending order.

- For example, in the ExamWRITER Control Center, you can click the **Patient** heading on the **Open Charts** tab and sort the Patient column in ascending order. Clicking on the Patient heading a second time will not sort the column in descending order.

▶ **To use the right-click functionality**

❖ Right-click throughout the ExamWRITER interface to open shortcut windows, process text files, add impressions and observations to an exam, and delete EMR text.

Throughout the ExamWRITER interface, there are many areas where you can right-click to open a shortcut window. In many places, you can also right-click to open a window with menu options that are not available as menu options anywhere else in ExamWRITER.

- For example, in the ExamWRITER Control Center, you can right-click on **Open Charts** and select **Unlock Exam**. You can only unlock an exam by right-clicking on the open chart; there is no other way to unlock an exam.

Note	Only one person at a time should access a patient's exam record. If more than one person accesses the same exam record at the same time, data from that record will be lost!

– For example, in the ExamWRITER Control Center you can right-click on **Previous Exams** (if available) and select **Copy to New Exam**. You can only copy a previous patient exam to a new exam by right-clicking on the previous exam; there is no other way to copy the previous patient exam to a new exam.
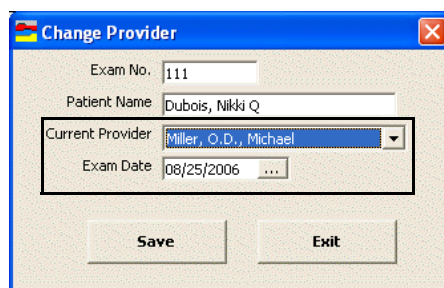
Note	If there are no closed or finalized exams for a patient, then the patient will have no previous exams recorded in ExamWRITER.

– For example, in the ExamWRITER Control Center Open Charts and Chart Search windows, you can right-click on a patient and select **Delete Exam** to delete a patient's exam record.

– For example, in the ExamWRITER Control Center Chart Search window, you can right-click on a patient and select **Un-Delete Exam** to restore a deleted exam record.

– For example, in the ExamWRITER Control Center Open Charts, Chart Search, and Previous Exams views, you can right-click on a patient and select **Change Provider/Exam Date** (or **Change Provider** in the Previous Exams view) to modify the patient's provider or exam date. Select a provider from the **Current Provider** drop-down menu to select a new provider for the patient. Select an exam date from the **Exam Date** calendar to change the exam date.

| Note	You can only modify a patient's provider and exam date on the Chart Search tab and Previous Exams view if the exam is closed. You cannot modify a patient's provider and exam date on the Chart Search tab or Previous Exams view if the exam is finalized.

– For example, in the ExamWRITER Control Center Open Charts window, you can right-click on a patient and select **Update Patient Room**, select the room in the office where the patient is located, and click **Save** to denote this room on the ExamWRITER Control Center and Patient Quick List.
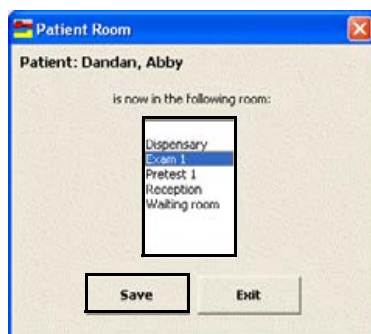
– For example, in the ExamWRITER Control Center Chart Search window you can right-click on a patient's finalized exam and select **Patient Information** to open the Patient Information Center window and view the patient's demographic and medical information.

Throughout ExamWRITER you can record and process medical record information by clicking **Process**; you can add impressions and observations to an EMR by clicking a yellow **Observations** button. You can also right-click anywhere within these windows to record and save the medical record information and add impressions and observations.

– For example, in the **Reason for Visit** window, you can select Reason for Visit, Patient Profile, Failed Screening, and Expressing Interest check boxes and then right-click anywhere in the window to process and record the selected information in the EMR.

– For example, in the **ACA RATIO Impressions/Observations** window, you can select the **Calculated ACA** or **Graphical ACA** check box and then right-click anywhere in the window to add the selected item to the ACA Ratio Observations.

To delete text in an EMR, right-click on the text header and click **Yes**.

– For example, in the **Chief Complaint** tab, you can right-click a bold heading under **Reason for Visit** and delete the heading and its accompanying text.

▶ **To access previous patient exams**

Use the green scroll arrows at the top of the exam chart window to access previous patient exams.

- Click the green left scroll arrow on the ExamWRITER chart window to scroll through older patient exams.

- Click the green right scroll arrow on the ExamWRITER chart window to scroll through newer patient exams.

- Click the green square on the ExamWRITER chart window to return to the exam that you most recently opened.

Note	You cannot modify the exams that you scroll though.

To open a previous exam from within a currently opened exam, select a date and primary procedure code from the **Exam History** drop-down menu on the exam chart window.

▶ **To record orders (F3)**

❖ Press the **F3** key anytime during an exam to open the Orders window and record a patient's examination, surgery, test, consultation, and laboratory orders.
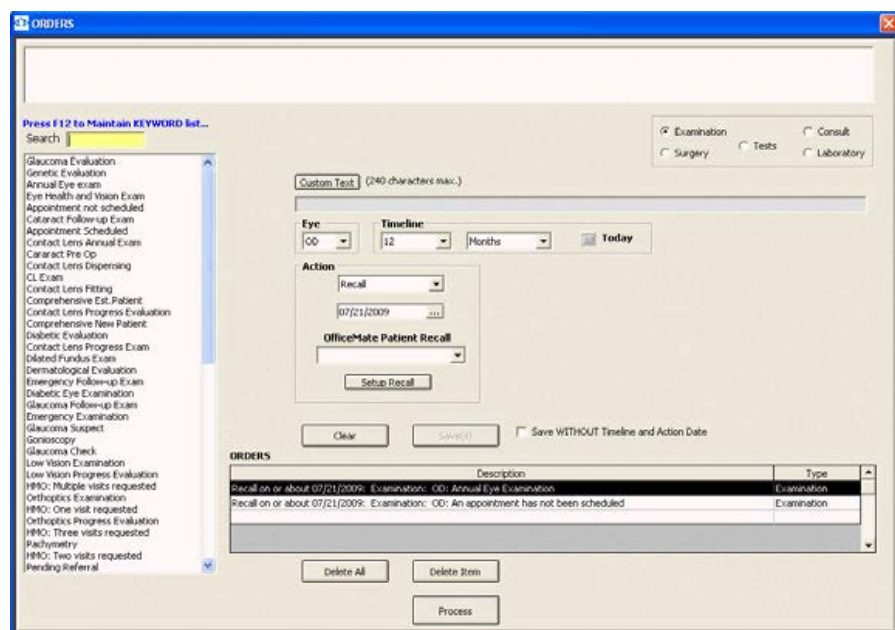
▶ **To view and print a patient report (F4)**

❖ Press the **F4** key anytime during an exam to open and print a compilation of a patient's reported diagnoses. This report opens in your default word processing program as an .rtf formatted file.

▶ ### To search in ExamWRITER (F5)

❖ Press the **F5** key anytime during an exam to open the Keyword Search window and search for information in ExamWRITER. For more information on searching in ExamWRITER, go to Searching in ExamWRITER on page 91.

▶ ### To record medication orders (F6)

❖ Press the **F6** key anytime during an exam to open the Medication Order window and record a patient's prescription medication.

▶ ## To add and maintain list box selections (F12)

❖ Press the **F12** key when your cursor is in a drop-down box to open a **Code Maintenance** window and add new items and resequence the selections.

– For example, press **F12** while your cursor is in the **Dosage** drop-down box in the **Medication Order** window. Type a dosage in the **Description** column and click **Save/Exit** to add the dosage to the drop-down menu selections or select a dosage and click **Delete** to delete the dosage from the drop-down menu selections. You can also move drop-down menu selections up or down one row at a time or to the top or bottom of the list by clicking the arrow buttons and you can alphabetize the selections by clicking **A...Z**.
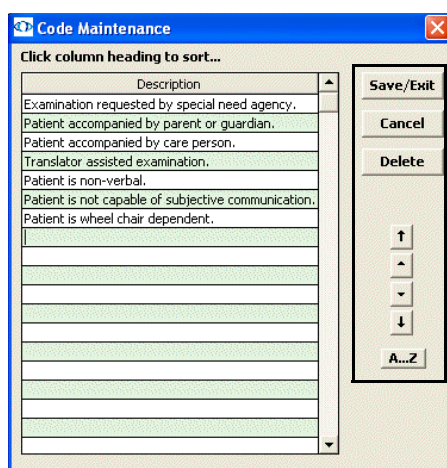
System Specifications

OfficeMate Software Solutions suggests using Dell and IBM computers. The following sections describe the software, hardware, and network system specifications that are required when using ExamWRITER:

• Software Specifications, 39

• Hardware Specifications, 40

• Network Specifications, 43

Software Specifications

Software	Recommendation	Minimum Requirement	Notes
Operating System	Windows® XP Professional or Windows® Vista SP1 (Business Edition, Enterprise Edition, or Ultimate Edition) (workstations); Windows® 2003 Server (servers)	Windows® 2000 Professional	Install the latest service pack and critical updates for your operating system. Windows® XP Vista, Windows® XP Home, and Windows® XP Media Center Edition are not recommended for office environments. For information about the differences between Windows® XP Home Edition and Professional Edition, go to http://www.officemate.net/omkb/article.aspx?id=14170. Ensure that your computer is certified for the operating system that you are using. For information about the OfficeMate Suite and Windows Vista, go to http://www.officemate.net/omkb/Article.aspx?id=11512.
PC Processor	Intel® Pentium® D, 3.0 GHz	Intel® Pentium® 4, 2.0 GHz	OfficeMate and ExamWRITER are compatible with all x86 processors, including x64 and dual-core processors.
Server Processor	Intel® Xeon® 3000	Intel® Core™ Duo	If you are using Microsoft Exchange Server, ensure that you are using 1–2 GB RAM.

Hardware Specifications

Note	• OfficeMate Software Solutions highly recommends employing certified operating system and networking technicians to install and manage your computer systems. OfficeMate does *not* provide support for your computer systems.
	• Our hardware specifications are intended as general guidelines for routine single and multiuser installations. These requirements do not include specifications for Microsoft Terminal Server installations. Microsoft Terminal Server has unique hardware, network, installation, and configuration requirements and it must be installed and configured by technicians with Terminal Server expertise; OfficeMate Software Solutions does *not* provide this expertise. If you are remotely accessing your computers using Terminal Server or Remote Desktop, your OfficeMate Suite software must be licensed for 16+ computers. If your software is not licensed for 16+ computers, contact Sales at 1.800.269.3666 or sales@officemate.net.

Hardware	Recommendation	Minimum Requirement	Notes
RAM on Workstations	1 GB or higher	512 MB	Memory has a significant impact on your system performance. Using 512 MB or higher RAM in each computer will noticeably improve performance.
RAM on Servers	More than 1 GB or higher, depending on how many workstations and services the server is hosting	1 GB or higher	Memory has a significant impact on your system performance. Using 1 GB or higher RAM in the server will noticeably improve performance.
Hard Drive	40 GB or higher with at least 2 GB free 7200/10k RPM is recommended for servers.	40 GB or higher with at least 2 GB free	ExamWRITER will occupy approximately 30 MB of hard drive space; this figure does not include patient data.
Monitor	17-inch	15-inch	Flat LCD screens are recommended with a minimum resolution of 1024x768 pixels.
Monitor and Video Adapter	1024 x 768 pixels	1024 x 768 pixels	ExamWRITER requires 64k colors.

Hardware	Recommendation	Minimum Requirement	Notes
Document Printer	HP LaserJet	HP LaserJet	Multifunction printers may not operate properly and are not recommended.
Mailing and File Folder Label Printer	Dymo LabelWriter 400	Dymo LabelWriter 400	
Barcode Printer	SATO CX 400	SATO CX 400	
Document Scanner			OfficeMate does not recommend a specific scanner brand or model; you can use any scanner that can create an electronic document with the OfficeMate & ExamWRITER eDocuments feature. For more information on scanners, see our Knowledge Base article #10958, or consult your hardware technician.
Barcode Scanner	Datalogic Gryphon M100 USB Cordless Handheld Scanner or Datalogic Heron D130 USB Corded Handheld Scanner	Datalogic Gryphon M100 USB Cordless Handheld Scanner or Datalogic Heron D130 USB Corded Handheld Scanner	
Internet Connection	High-speed Internet DSL, cable, or T1 connection	56k or higher dial-up Internet connection	High-speed DSL or cable modems are recommended for Internet access and OfficeMate training and support.

Hardware	Recommendation	Minimum Requirement	Notes
Backup Media	Separate high-density removable storage media (i.e., CD-R, CD-RW, Zip disk, Jaz disk) for each day of the week. Off-site storage backup with OfficeMate iBackup Powered by DataHEALTH is also recommended.	High-density removable storage media (i.e., CD-R, CD-RW, Zip disk, Jaz disk)	OfficeMate suggests using CD-RW media to manually backup your office and patient data and OfficeMate iBackup Powered by DataHEALTH to automatically backup, confirm, and protect your office and patient data. For data only backups, 100/250 MB Zip disks are acceptable. If you are a Windows® 2000 or Windows® XP user, you can use the included backup utility. After-market programs such as Backup Exec offer extended backup scheduling options. Although OfficeMate recommends the backup software listed above, it does not provide support for any backup software.
Uninterruptible Power Supply (UPS)	UPS on each workstation and file server	UPS on file server	Electric power is not always delivered to your outlets in perfect condition. Fluctuations can impact your computer's performance. A total loss of power can damage your data if your system was running at the time of a power loss. A UPS with line conditioning capabilities can help control the level of power coming to your system. In the event of a power loss, a UPS contains a backup battery to keep your computer running long enough to safely shut it down.

Network Specifications

The recommended network configuration uses a dedicated Windows® 2003 Server operating system with Windows® XP Professional installed on each computer. ExamWRITER can be used with Windows® peer-to-peer networks for configurations of three or fewer computers, but for networks with more than three computers, a dedicated file server is strongly recommended. Only use TCP/IP when configuring your network.

Note	OfficeMate Software Solutions highly recommends employing certified operating system and networking technicians to install and manage your computer systems. OfficeMate does *not* provide support for networks.

Network Item	Recommendation	Minimum Requirement	Notes
Cables	Category 5 Twisted Pair and Shielded Twisted Pair (STP) Ethernet	Category 5 Twisted Pair and Shielded Twisted Pair (STP) Ethernet	
Cards	3Com or Intel 10\100\1000 Mbps Ethernet	3Com or Intel 10\100 Mbps Ethernet	
Switches	1000 Mbps transfer rates	100 Mbps transfer rates	OfficeMate does not recommend using hubs.
Wireless	802.11G Purchase your wireless access port and wireless network card from the same manufacturer. Enable wireless security.	802.11G Purchase your wireless access port and wireless network card from the same manufacturer. Enable wireless security.	Wireless networks offer significantly lower performance and reliability than wired networks; therefore, OfficeMate does not currently recommend wireless networks in environments where high performance is necessary.
Remote Access	GoToMyPC		GoToMyPC is HIPAA compliant. For more information on using GoToMyPC for remote access, go to www.gotomypc.com.

Loading & Updating Patient Demographic Data

If you are a new ExamWRITER user and you are using the standalone version of ExamWRITER (without OfficeMate), you can load patient demographic data from selected third party practice management software systems into ExamWRITER. **You only need to load the patient demographic data once**; after you load the demographic data you can update it based on a schedule that suits your practice needs. This section includes the following topics:

Loading Initial Patient Demographic Data

Note	If you are an existing ExamWRITER (OPIS-CPR) user and you have converted your existing OPIS-CPR data into new ExamWRITER data, do *not* complete the steps in this section.

1   Create a **BIDEAS** folder on your shared drive.

2   On the ExamWRITER main window, click **Tools** and select **Initial Patient Load**.

The **Initial Patient Import** window opens.

3   Select one of the following import modes:

–   OVERWRITE existing file

–   APPEND TO existing file

| Notes | • Choose to overwrite the existing file if you want to replace all of the patient demographic information that you have stored in ExamWRITER with the patient demographic information that is in your third party practice management software system.
• Choose to append the existing file if you have already entered patient demographic information into ExamWRITER and you want to retain that information. Appending the existing file will merge the patient demographic information that you exported from your third party practice management software system into ExamWRITER. |
| --- | --- |
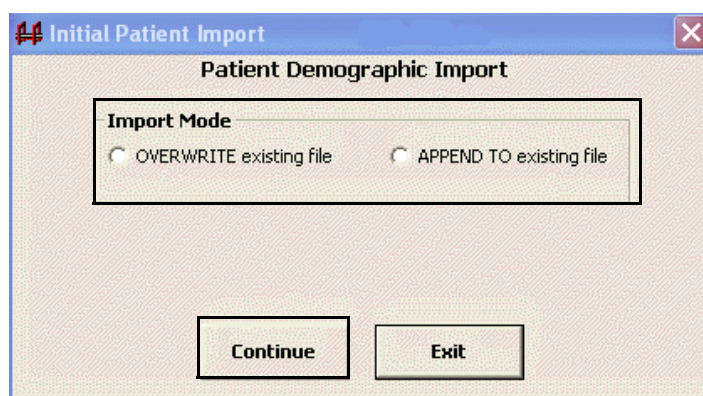
4   Click **Continue**.

The patient demographic information in your third party practice management software system is loaded into ExamWRITER.

Updating Patient Demographic Data

❖   On the ExamWRITER main window, click **Tools** and select **Patient Demographic Update**.

The patient demographic information in your third party practice management software system is updated in ExamWRITER.

Customizing ExamWRITER

ExamWRITER offers many ways for you to customize your EMRs. Before you begin creating, modifying, and viewing EMRs, customize ExamWRITER by defining your preferences, creating templates, and adapting correspondent, patient demographic, product, and medication information to your practice needs. If you are using the standalone version of ExamWRITER (without OfficeMate), you can also customize your list box selections, diagnosis and procedure codes, business names, and security preferences. This section includes the following topics:

For more information on customizing ExamWRITER, see the OSSU 109 "Setting Up ExamWRITER" iTrain.

Note	You cannot customize ExamWRITER when exam records are open. Close all exam records in the ExamWRITER chart window before customizing ExamWRITER in the ExamWRITER main window.

Customizing List Box Selections, Diagnosis Codes, & Procedure Codes

This section tells you how to customize list box selections, diagnosis codes, and procedure codes in the standalone version of ExamWRITER (without OfficeMate), including how

▶ ### To add list box selections

1   On the ExamWRITER main window, click **Tools** and select **Customization**.

   The **Customization** window opens.

2   Select an item in the **Entry Field Name** box.

3   Place your cursor in the first blank line at the bottom of the **Selection Items** box.
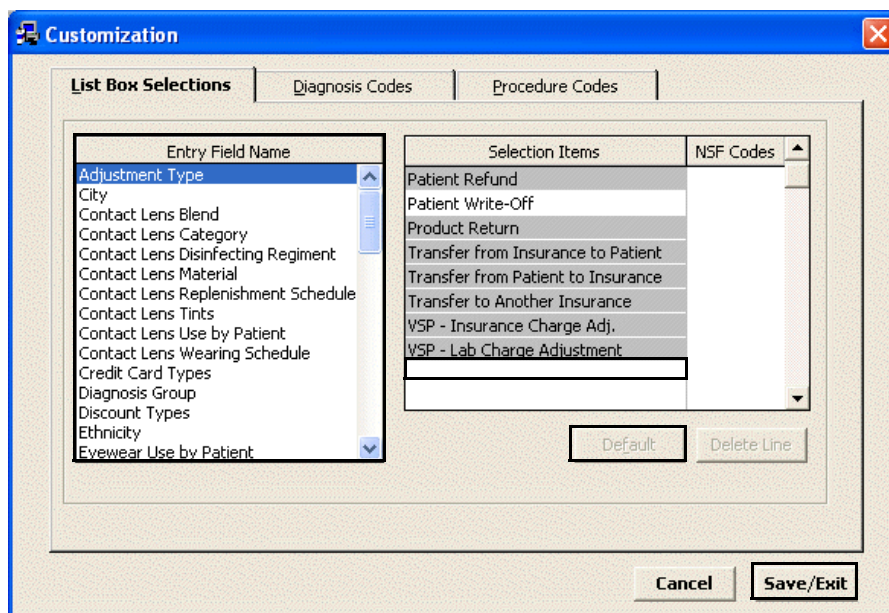
4   Type the new selection item.

Note	• To make an item the default item in the list, select the item in the Selection Items box and click **Default**.
	• To deselect a default item in the list, select the default item in the Selection Items box and click **UnDefault**.

5   Click **Save/Exit** to save the new list box selection and exit the Customization window.

▶ To modify list box selections

1   On the ExamWRITER main window, click **Tools** and select **Customization**.

The **Customization** window opens.

2   Select an item in the **Entry Field Name** box.

3   Click the item that you want to modify in the **Selection Items** box.
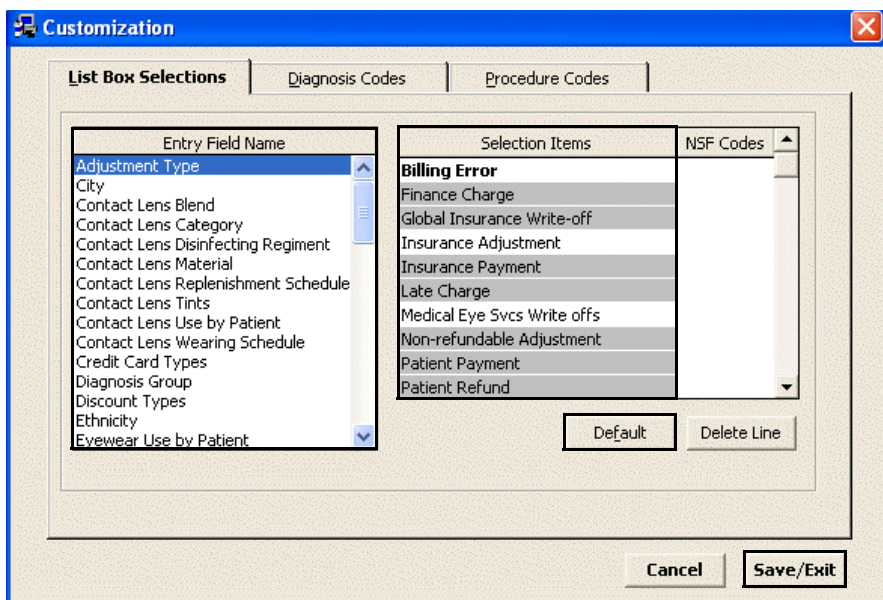
4   Type your changes.

Note	• To make an item the default item in the list, select the item in the Selection Items box and click **Default**.
	• To deselect a default item in the list, select the default item in the Selection Items box and click **UnDefault**.
	• You should only delete list box selections if they are *not* linked to any exams.

5   Click **Save/Exit** to save the modified list box selection and exit the Customization window.

▶ To add diagnosis codes

Note	When you upgrade to ExamWRITER versions 7.0 and above, the most recent diagnosis codes are imported into your current list of diagnosis codes. None of your current diagnosis codes are overwritten; only new codes are added. If ExamWRITER is unable to find an identical match for a CPT code that it needs to update, it adds the new CPT code and modifies the old CPT code by adding a "z" to the front of its name (for example, "z_Trachoma, Unspecified").

1   On the ExamWRITER main window, click **Tools** and select **Customization**.

The **Customization** window opens.

2   Click the **Diagnosis Codes** tab.

3   Click **New Code**.

4   Type a diagnosis code number in the **Code** text box.

5   Type a diagnosis code description in the **Description** text box.

6   Select a diagnosis group from the **Group** drop-down menu.
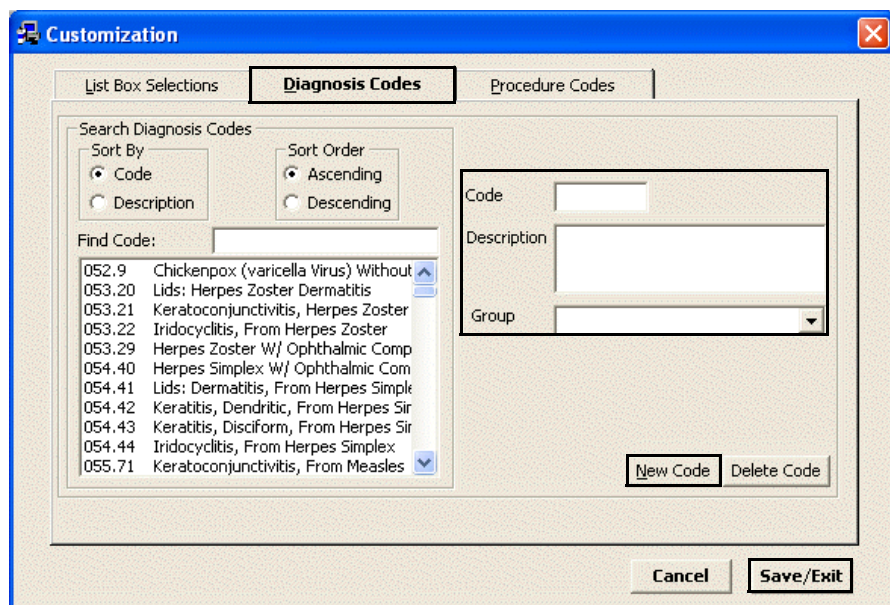
7   Click **New Code** to enter another diagnosis code.

OR

Click **Save/Exit** to save the new diagnosis code and exit the Customization window.

▶   To add procedure codes

1   On the ExamWRITER main window, click **Tools** and select **Customization**.

   The **Customization** window opens.

2   Click the **Procedure Codes** tab.

3   Click **New Code**.

4   Type a procedure code into the **Code** text box.

5   Type a procedure code description into the **Description** text box.

6   Select a type of service from the **Type of Service** drop-down menu.

7   Select a financial group from the **Financial Group** drop-down menu.

8   Select a production group from the **Production Group** drop-down menu.

9   Click **New Code** to enter another procedure code.

   OR

   Click **Save/Exit** to save the new procedure code and exit the Customization window.

Maintaining Business Names

This section tells you how to maintain business names in the standalone version of ExamWRITER (without OfficeMate), including how

▶ **To maintain business names**

1   On the ExamWRITER main window, click **Tools** and select **Business Names**.

The **Business Names** window opens.

2   Update or add information in the **Fax #**, **Contact**, and **Default Area Code** text boxes.

Note	You cannot modify your practice name, address, or phone number from within the Business Names window in ExamWRITER. If you need to modify this information, download the Address/Phone Number Change Request document at http://www.officemate.net/support_om_resources.aspx, complete the information on the form, and fax it back to OfficeMate Software Solutions at 866.202.6324.

3   Click **Save/Exit** to save the business name information and exit the Business Names window.

▶ **To modify or add provider/staff names**

1   On the ExamWRITER main window, click **Tools** and select **Business Names**.

The **Business Names** window opens.

2   Click the **Provider/Staff** tab.

3   Click **New** to add a new provider or staff member.

OR

Select a provider or staff member from the **Select Provider/Staff Member** drop-down menu to modify a provider or staff member.

Note	You should only delete provider or staff names if they are *not* linked to any exams.

4   Type text into the text boxes and choose appropriate options from the drop-down menus.

5   Type the login name in the **User ID** text box.

6   If you are adding a staff member for whom you are not tracking revenue, click the Provider **No** radio button.

7   If you want to enter HIPAA information, follow the instructions below:

a.   Type the NPI number in the **NPI Number** text box.

b.   Type the EIN number in the **EIN Number** text box.

c.   Select a date from the **Privacy Training Date** menu.

d.   Select the HIPAA Privacy Officer **Yes** radio button if the provider or staff member is a HIPAA Privacy Officer.

8　If you want to save a default signature for the provider or staff member that will print on medical prescriptions, click **Browse**, navigate to the signature, and click **Open**.

Notes	• OfficeMate Software Solutions recommends saving all signatures in the eDocuments folder.
	• All signatures must be saved using the JPEG graphic format.
	• Some states require an original signature on medical prescriptions. Check with your state regulatory agency to find out if printing a signature on prescriptions is legal in your state.

9　Click **Save/Exit** to save the provider/staff information and exit the Business Names window.

▶　To modify or add vendor names

1　On the ExamWRITER main window, click **Tools** and select **Business Names**.

The **Business Names** window opens.

2　Click the **Vendor** tab.

3　Click **New** to add a new vendor.

OR

Select a vendor from the **Vendor Name** drop-down menu to modify a vendor.

Note	You should only delete vendors if they are *not* linked to any exams.

4　Type text into the text boxes and choose appropriate options from the drop-down menus and check boxes.

5　Click **Save/Exit** to save the vendor information and exit the Business Names window.

Customizing Security Preferences

This section tells you how to assign or modify security preferences in the standalone version of ExamWRITER (without OfficeMate).

For more information on setting up security in ExamWRITER, see the OSSU 111 "Setting Up Security" iTrain.

1 On the ExamWRITER main window, click **Tools** and select **Security**.

   The **User Security for Employee** window opens.

2 Select the user for which you want to assign security access privileges.

3 Type the user's password in the **Password** and **Confirm PW** text boxes.

Note	If you are changing a password, delete the old password and type the new password in the **Password** and **Confirm PW** text boxes.

4 Select the appropriate check boxes under the **Security Access** tab.

Note	Ensure that the **Access All** check box is selected for at least one user.
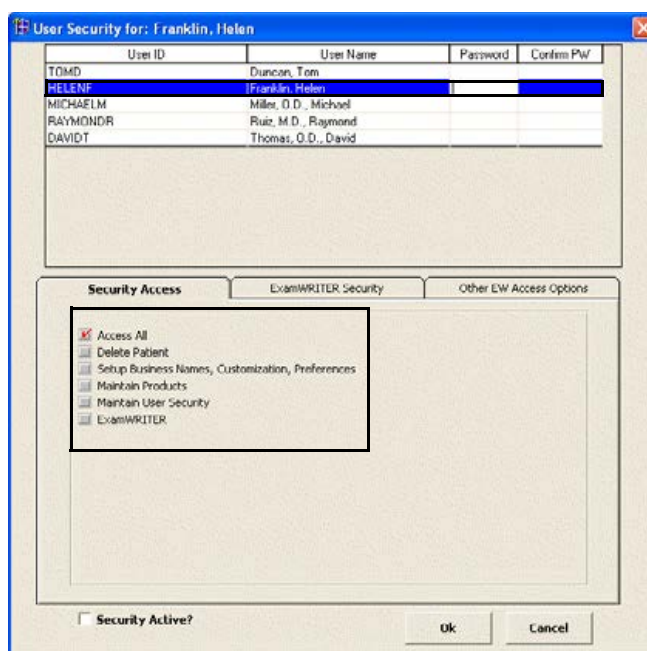
5   Click the **ExamWRITER Security** tab and select the appropriate check boxes.
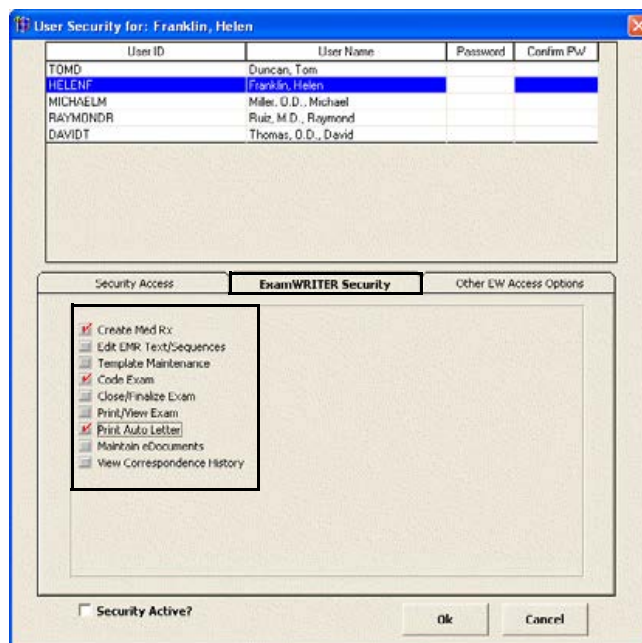
6   Click the **Other EW Access Options** tab and select the appropriate Full Access, Read ONLY, and No Access radio buttons.
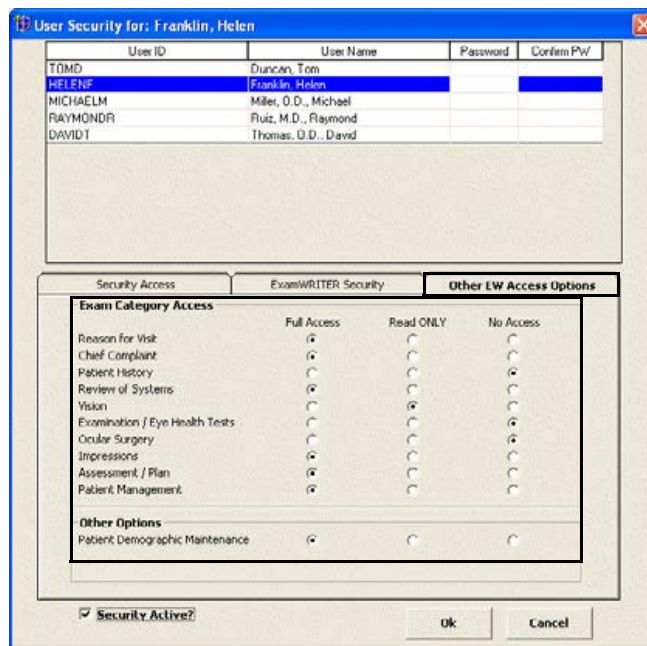
7   Select the **Security Active?** check box to activate security.

8   Click **OK**.

9   If you activated security, type your user ID and password in the
    ExamWRITER Login window and click **Login**.

Defining and Changing Preferences

This section tells you how to define and change preferences in ExamWRITER,
including how

*   To define and change general preferences, 55

*   To define and change report settings preferences, 57

*   To define and change default preferences, 59

*   To define and change copy forward preferences, 61

*   To define and change Rx print option preferences, 61

Note	You can change your ExamWRITER preferences any time you are *not* in an exam record. Close all exam records in the ExamWRITER chart window before changing ExamWRITER preferences.

▶   **To define and change general preferences**

1   From the ExamWRITER main window, click **Tools** and select **Preferences**.

    The **Preferences** window opens.

2   Click the **General** tab.
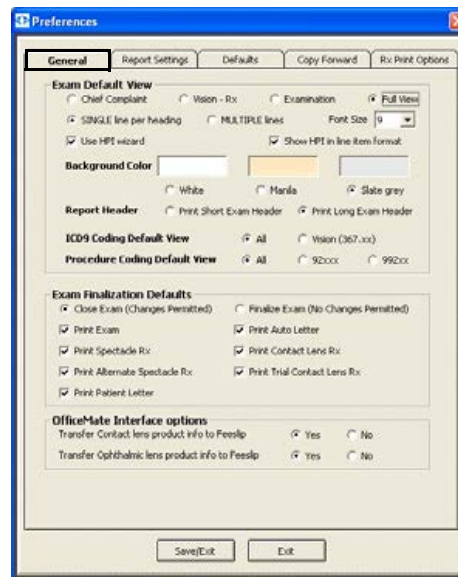
3   Select the appropriate **Exam Default View** radio buttons to open
     ExamWRITER in the Chief Complaint, Vision-Rx, Examination, or Full View
     and to display SINGLE lines per heading (paragraph form) or MULTIPLE lines
     per heading (vertical line form).

     The default views are Full Exam View and MULTIPLE lines.

4   If you want to use the HPI Wizard to more easily and accurately document HPI
     information, select the **HPI wizard** check box. If you select this check box,
     select the **Show HPI in line item format** check box if you want to document
     HPI information on an exam record in a vertical, multiline format (leave the
     check box deselected if you want to document HPI information on an exam in
     a horizontal, narrative format).

     The default preference does not have the HPI wizard check box selected.

5   Select an exam display font size from the **Font Size** drop-down menu.

     The default font size is 10.

6   Select the appropriate **Exam Background Color** of White, Manila, or Slate
     grey.

     The default exam background color is Slate grey.

7   Select the appropriate **Exam Report Format** to Print Short Exam Headers or
     Print Long Exam Headers.

     The default format is Print Long Exam Header.

Note	Printing a short exam header will print the patient's name, DOB, age, exam date, occupation, and chart number. Printing a long exam header will print the patient's name, DOB, age, exam date, occupation, social security number, chart number, address, and phone number.

8   Select a default ICD-9 coding and default procedure coding view for the Diagnosis/Procedure Coding window from the **ICD9 Coding Default View** and **Procedure Coding Default View** radio buttons.

The default view is All.

9   Select the appropriate **Exam Finalization Defaults** to Close Exam (Changes Permitted), Finalize Exam (No Changes Permitted), Print Exam, Print Auto Letter, Print Spectacle Rx, Print Contact Lens Rx, Print Alternate Spectacle Rx, Print Trial Contact Lens Rx, and Print Patient Letter.

Note	If you select Finalize Exam (No Changes Permitted), you cannot make changes to the exam after it is finalized and closed. You will only be able to add information to the exam in an addendum.

10   If you are an OfficeMate user and you want to automatically transfer contact lens product information from ExamWRITER into OfficeMate fee slips, select the **Yes** Transfer Contact lens product info to Feeslip radio button.

Notes	• If you select the **Yes** radio button to transfer contact lens products to fee slips, open charges will be created in OfficeMate after you create an OfficeMate Rx.
	• If you select the **Yes** radio button and select a product with a quantity of 0 in the Contact Lens Rx window, no charges will post to an OfficeMate fee slip.

11   If you are an OfficeMate user and you want to automatically transfer ophthalmic lens product information from ExamWRITER into OfficeMate fee slips, select the **Yes** Transfer Ophthalmic lens product info to Feeslip radio button.

Notes	• If you select the **Yes** radio button to transfer ophthalmic lens products to fee slips, open charges will be created in OfficeMate after you create an OfficeMate Rx.
	• If you select the **Yes** radio button and select a product with a quantity of 0 in the Contact Lens Rx window, no charges will post to an OfficeMate fee slip.

12   If you are using the standalone version of ExamWRITER (without OfficeMate) and a selected third party practice management software system, select the location of your BIDEAS folder in the **ExamWRITER Import/Export Directory** box.

13   Click **Save/Exit** to save your changes and close the Preferences window.

▶   To define and change report settings preferences

1   From the ExamWRITER main window, click **Tools** and select **Preferences.**

The **Preferences** window opens.

2   Click the **Report Settings** tab.

3   Enter the number of blank lines that you want to appear in your report header.

Note	If you are not using your office stationary and you want to print a report heading, enter 0 as the number of blank lines.

4   Type the Report Closing that you want to appear in your report footer.

5   Enter the number of blank lines that you want to appear between the closing and doctor's name.

6   Select appropriate **Auto Letter Preferences** Yes or No radio buttons to display or hide the presenting Rx, manifest Rx, cycloplegic Rx, and alternate Rx on auto letters.

7   Click **Save/Exit** to save your changes and close the Preferences window.

▶ To define and change default preferences

1   From the ExamWRITER main window, click **Tools** and select **Preferences.**

    The **Preferences** window opens.

2   Click the **Defaults** tab.
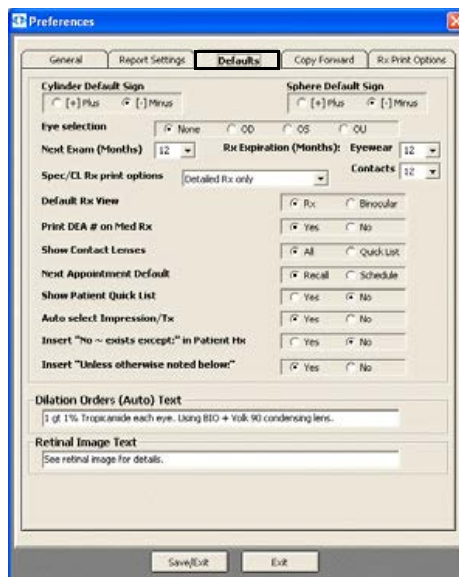
3   Select the appropriate default **Cylinder Form**.

    The default is [-] Minus.

4   Select the appropriate default **Sphere Form**.

    The default is [-] Minus.

5   Select the appropriate default **Eye Selection** to view ExamWRITER text data
    for None, OD, OS, or OU.

    The default is None.

6   Select a default recall date from the **Next Exam (Months)** drop-down menu.

    The default is 12 months.

7   Select a default eyewear and contact lens Rx expiration date from the **Rx
    Expiration (Months)** drop-down menus.

    The defaults are 12 months.

8   Select the default spectacle and contact lens Rx print option from the **Spec/CL
    Rx print options** drop-down menu.

    The default is Wallet size Rx only.

9   Select the appropriate **Default Rx View**.

    The default is Rx.

10 Select the appropriate default **Print DEA # on Med Rx** radio button.

    The default is Yes.

11 Select the appropriate default **Show Contact Lenses** radio button to choose whether you want to view all contact lenses or only the lenses that are in your Quick List in the Select Contact Lens window.

The default is All.

12 Select the appropriate **Next Appointment Default** radio button to choose whether you want to assign a recall date or schedule an appointment in the Follow-Up window.

The default is Recall.

Notes	• If you select **Recall**, the recall will be recorded in the EMR and OfficeMate.
	• If you select **Schedule**, the appointment will be recorded in the EMR, but no appointment will be scheduled in OfficeMate.

13 Select the appropriate **Show Patient Quick List** radio button to choose whether you want to always display or hide the Patient Quick List.

The default is Yes.

14 Select the appropriate **Auto select Impression/Tx** radio button to choose whether you want to automatically open impression and treatment windows after selecting examination exceptions.

The default is Yes.

15 Select the appropriate **Insert "No ~ exists except:" in Patient Hx** radio button to choose whether you want to automatically insert the "No ~ exists except:" text in the exam record when an exception is selected in the Patient History window.

The default is Yes.

16 Select the appropriate Insert "Unless otherwise noted below:" radio button to choose whether you want to automatically select the "Unless otherwise noted below:" check box on the Patient History, Review of Systems, External Exam, Slit-Lamp Exam, and Routine Ophthalmoscopy windows

The default is Yes.

17 Type the default **Dilation Orders (Auto)** in the text box.

The default is DFE performed using BIO and SLE w/Volk 90D lens.

18 Type the default **Retinal Image** text in the text box.

The default is See retinal image for details.

19 If you are using the standalone version of ExamWRITER (without OfficeMate) and a selected third party practice management software system, select the On **Third Party Interface** radio button to export exam files to your BIDEAS folder or select the Off radio button if you do not want to export exam files to your BIDEAS folder.

20 Click **Save/Exit** to save your changes and close the Preferences window.

▶ To define and change copy forward preferences

1   From the ExamWRITER main window, click **Tools** and select **Preferences.**

    The **Preferences** window opens.

2   Click the **Copy Forward** tab.
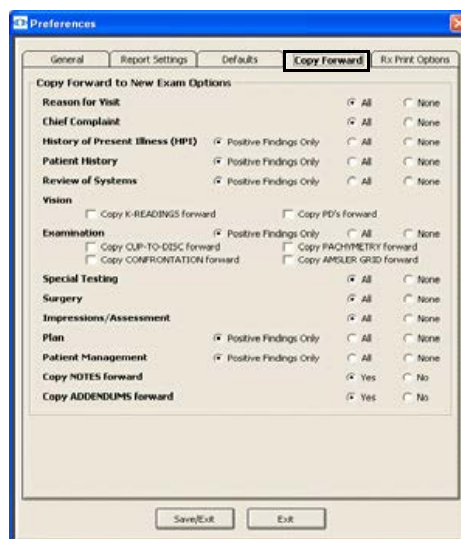
3   Select the appropriate **Copy Forward To New Exam Options** to copy
    former patient specific exam template information to a new patient exam.

4   Click **Save/Exit** to save your changes and close the Preferences window.

▶ To define and change Rx print option preferences

1   From the ExamWRITER main window, click **Tools** and select **Preferences.**

    The **Preferences** window opens.

2   Click the **Rx Print Options** tab.
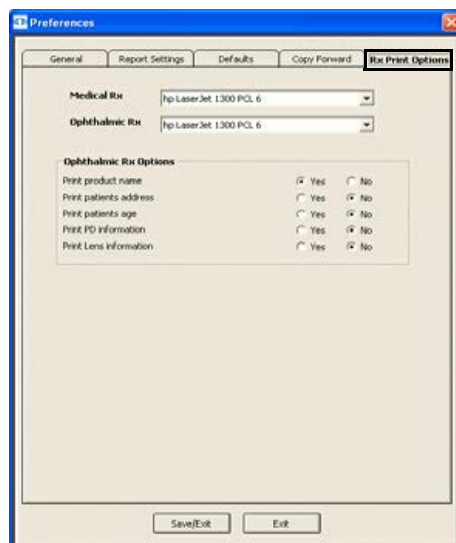
3   Select the printer where you want to print medical prescriptions from the **Medical Rx** drop-down menu.

4   Select the printer where you want to print ophthalmic prescriptions from the **Ophthalmic Rx** drop-down menu.

5   Select appropriate **Ophthalmic Rx Options**.

6   Click **Save/Exit** to save your changes and close the Preferences window.

Setting Up Barcode Label Options

Note	The SATO CX208 and CX400 barcode printers are the only barcode printers that are compatible with OfficeMate and ExamWRITER. To purchase a SATO barcode printer, contact OfficeMate Sales at 1.800.269.3666.

For more information on using your SATO barcode printer, see the "Scanning and Printing Barcodes With OfficeMate" document.

1   From the ExamWRITER main window, click **Tools** and select **Product Setup**.

The **Product Setup** window opens.

2   Click the **Preferences** tab.

3   Select up to four lines of information to print on barcode labels from the **Barcode Label Options** list.

4   Select the **UPC Code** or **Product code** radio button to print a UPC or product code column on barcode labels.

5   Select your barcode printer from the **Bar Code Printer** drop-down menu.

6   Type the communication port to which your barcode printer is connected in the **Comm. Port for Barcode Printer** text box.

7   Click **OK** to close the Product Setup window.

Setting Up Mass Changes

Set up mass changes to simplify changes in your costs and fees.

1   From the ExamWRITER main window, click **Tools** and select **Product Setup**.

     The **Product Setup** window opens.

2   Click the **Mass Change** tab.

3   Select a product type from the **Product Type** drop-down menu.

4   Select a manufacturer from the **Manufacturer** drop-down menu.

5   Select a designer series, if applicable, from the **Designer Series** drop-down menu.

6   Select the **Cost** or **Fee** Data to change radio button.

7   Type either the percent or amount by which you want to change the cost or fee in the **Percent** or **Amount** text box.

8   Select the **Up** or **Down** Round radio button to round amounts up or down.

9   Type the amount that you want the cost or fee to end with in the **End amount with** text box.

10   Click **Process Changes**.

11   Click **OK** to close the Product Setup window.

Maintaining Correspondent Information

For more information on maintaining correspondents, see the OSSU 109 "Setting Up ExamWRITER" iTrain.

This section tells you how to maintain correspondent information in ExamWRITER, including how

- To modify or delete a correspondent, 64

- To create a new correspondent, 65

▶ **To modify or delete a correspondent**

1   From the ExamWRITER main window, click **Tools** and select **Correspondent Maintenance.**

    The **Correspondent Select** window opens.

Note	To search for a correspondent, type text in the **Search "File As" for...** text box.
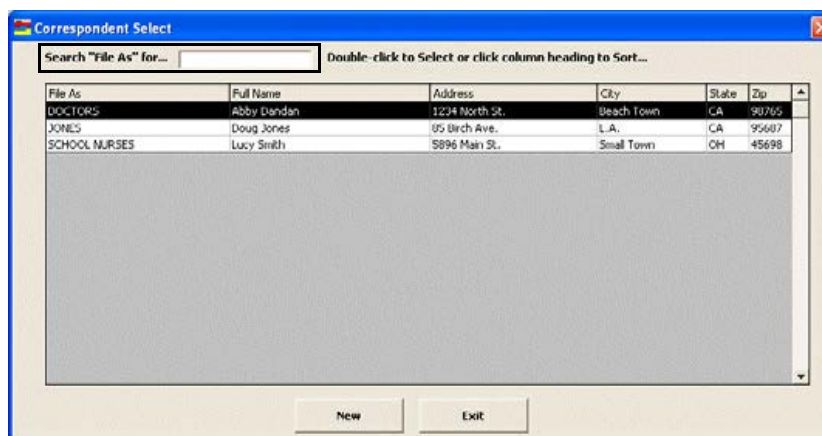
2   Double-click the correspondent you want to modify.

    The **Correspondent Maintenance** window opens.

3   Modify the correspondent and click **Save**.

    OR

    Click **Delete** to delete the correspondent from your database.

4   Click **Exit** to close the Correspondent Select window.

▶   To create a new correspondent

1   From the ExamWRITER main window, click **Tools** and select
     Correspondent Maintenance.

     The **Correspondent Select** window opens.

2   Click **New** to add a new correspondent to your database.

     The **Correspondent Maintenance** window opens.

3   Type text into the fields and click **Save**.

Note	The text you type in the File As text box will determine what group this correspondent is filed with (for example, "School Nurses," "Doctors," or in alphabetical order by last name).

4   Click **Exit** to close the Correspondent Select window.

Maintaining Patient Demographic Information

This section tells you how to maintain patient demographic information in ExamWRITER, including how

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-

Note	If you are an OfficeMate user, any modifications or additions that you make to patient demographic information in ExamWRITER will be reflected in OfficeMate. Likewise, any modifications or additions that you make to patient demographic information in OfficeMate will be reflected in ExamWRITER.

▶ **To maintain patient demographic information**

1   On the ExamWRITER main window, click **Tools** and select **Patient Demographic Maintenance**.

The **Find Patient/Guarantor** window opens.

2   Enter text into the **Selection Criteria** text boxes to search for a patient.

3   Select the **Include inactive** check box to find inactive patients.
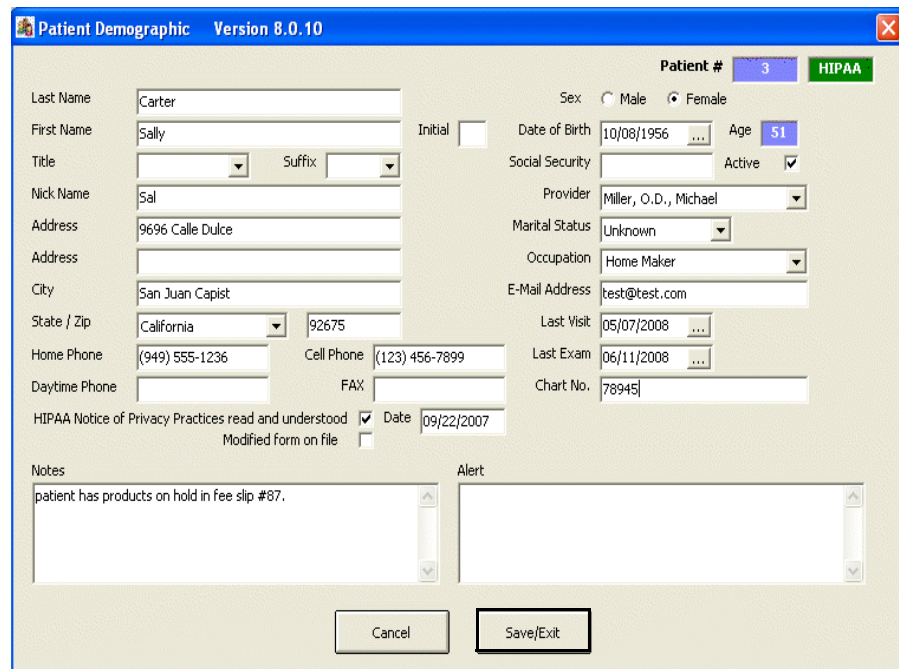
4   Click **F2 Find**.

A list of patients meeting your selection criteria is displayed.

Note	Click **Clear** to clear your search and start over.

5   Double-click on the patient that you want to modify.

OR

Click on the patient that you want to modify and click **Select**.

The **Patient Demographic** window opens.

6   Modify the patient demographic information and click **Save/Exit**.

▶ To add new patient demographic information

1   On the ExamWRITER main window, click **Tools** and select **Patient Demographic Maintenance**.

The **Find Patient/Guarantor** window opens.

2   Click **New**.

The **Patient Demographic** window opens.

3   Type the new patient demographic information into the text boxes.

4   Click **Save/Exit**.

Maintaining Product and Service Information

Note	Contact lens product information can also be accessed and modified from the **Vision/Rx** tab on the ExamWRITER chart window. Click the **Contacts** tab on the **Vision** bar and then click anywhere in the **Presenting Contact Rx** box to access the **Contact Lens Presenting**, **Trial**, and **Final** tabs. Select an OD or OS contact lens product name from the **Product Name** menu. The **Select Contact Lens** window opens. Click **Edit Product** to open the **Products** window and modify the contact lens product information.

1   For more information on maintaining products and services, see the "Maintaining Product & Service Information" chapter in the *OfficeMate User's Guide* and the OSSU 105 "Setting Up Products & Services" iTrain. On the ExamWRITER main window, click **Tools** and select **Product/Contact Lens Maintenance**.

The **Products** window opens.

Note	To add a new product or service, click **New Product**.

2   Select a product or service from the **Product Type** drop-down menu.

3   Select a product manufacturer from the **Manufacturer** drop-down menu or select a service **CPT** code radio button.

4   Type a product or service name in the **Product Name** text box.

5   Select the **Include inactive products** check box if you want to maintain product or service information for inactive products or services.

6   Click **F2-Find** to search for a product or service.

Note	To conduct an advanced search for a product, click **Advanced Search** to open the Find Product window and search for a product using additional criteria.

7   Double-click on the product or service that you want to modify.

Note	You can drag and drop column headings to rearrange column views.

8   Select appropriate options from the drop-down menus and complete the necessary Additional Fees, HCFA - 1500 Additional Information, Notes, and other fields.

Notes	• To copy product or service information to a new product or service style, click **Copy**.
	• You must assign contact lenses to a lens category in order for them to appear in the Select Contact Lens window.

9   To record a CPT code, select a CPT code from the **CPT/HCPS Code**
     drop-down menu.

Note	• You must select CPT codes for your services before you code an exam in order for the service to appear in the Diagnosis/Procedure Coding window. • You can assign two CPT codes to ophthalmic lenses by recording a CPT code in the CPT/HCPCS Code text box in the Products tab and in the Product Code text box in the Product Details tab. If you assign two CPT codes to ophthalmic lenses, the codes recorded in the Product Code text box in the Product Details tab will override the codes in the CPT/HCPCS Code text box in the Products tab when you add the lenses to fee slips in OfficeMate. If you do not record a CPT code in the Product Code text box in the Product Details tab, the code in the CPT/HCPCS Code text box in the Products tab will appear on fee slips in OfficeMate.

10   Click the **Product Details** tab to modify product sizes, colors, and codes; print
     bar codes; and mark products as being discontinued.

Note	In addition to selecting colors from the **Color** drop-down menu, you can also type colors in the **Color** text box.

11   Click **Save**.

12   Select one of the following options:

– **Save** to save the information and keep the Products window open.

– **Save and New** to save the information and create a new product.

– **Save and Exit** to save the information and close the Products window.

Maintaining Medication Information

For more information on maintaining medications, see the OSSU 109 "Setting Up ExamWRITER" iTrain.

This section tells you how to maintain medication information in ExamWRITER, including how

- To maintain medication information, 73

- To add new medication information, 75

- To delete medication information, 77

Note	You can customize and maintain medication information at any time while you are entering information into an EMR. To access the Medications Maintenance window from within an EMR, follow the instructions below:
	1 Click the **Patient Hx – ROS** tab.
	2 Click the **Patient History** bar.
	The **Patient History** window opens.
	3 Select the **Medications - Systemic/Ocular** check box and click **Process**.
	The **Patient SYSTEMIC Medications** window opens.
	4 Right-click on a medication to customize or maintain it.
	The **Medications Maintenance** window opens.

▶   To maintain medication information

1   On the ExamWRITER main window, click **Tools** and select **Medications Maintenance**.

The **Medications Maintenance** window opens with a list of the most commonly prescribed medications.

2   Type text in the **Name Search** text box to search for a medication.

OR

Select a group from the **Group to view** drop-down menu.

Note	Click on a column heading to sort the column in ascending order.

3   Double-click the medication that you want to modify.

The medication information appears in the text boxes at the top of the Medications Maintenance window.

4   Click the **Yes** radio button to show the medication in the Quick List of medications.

OR

Click the **No** radio button to keep the medication in the database, but hide it in the Quick List of medications.

5   Modify the **Category**, **Name**, **Generic**, **Indications**, **Group**, and **Default Values** information.

6   Click **Save** to save your changes and keep the Medications Maintenance window
     open.

     OR

     Click **Save/Exit** to save your changes and close the Medications Maintenance
     window.

▶ To add new medication information

1   On the ExamWRITER main window, click **Tools** and select **Medications Maintenance**.

     The **Medications Maintenance** window opens with a list of the most commonly prescribed medications.

2   Click **Add**.

3   Click the **Yes** radio button to show the medication in the Quick List of medications.

     OR

     Click the **No** radio button to keep the medication in the database, but hide it in the Quick List of medications.

4   Add information to the **Category**, **Name**, **Generic**, **Indications**, **Group**, and **Default Values** text boxes and drop-down menus.

5   Click **Save** to save your changes and keep the Medications Maintenance window
     open.

     OR

     Click **Save/Exit** to save your changes and close the Medications Maintenance
     window.

▶ To delete medication information

1   On the ExamWRITER main window, click **Tools** and select **Medications Maintenance**.

The **Medications Maintenance** window opens with a list of the most commonly prescribed medications.

2   Type text in the **Name Search** text box to search for a medication.

OR

Select a group from the **Group to view** drop-down menu.

Note	Click on a column heading to sort the column in ascending order.

3   Double-click the medication that you want to delete.

The medication information appears in the text boxes at the top of the Medications Maintenance window.

4   Click **Delete**.

Note	Deleting a medication does not remove it from a patient record; instead, deleting a medication removes it from the OfficeMate database.

5   Click **Exit** to close the Medications Maintenance window.

Creating and Modifying Templates

OfficeMate strongly recommends using templates to maintain complete EMRs, reduce repetitive data entries, and save time entering patient exam information into ExamWRITER. Create templates using text that you write repetitively 80 percent or more of your time. Each time that you use a template to launch an exam, all of the text that you saved in your template will automatically appear in the new EMR. You can create problem focused and procedure focused templates.

Notes	• Templates using the narrative format display exam text on the ExamWRITER chart window in paragraphs.
	• Templates using the line item format display exam text on the ExamWRITER chart window in separate vertical lines.

This section tells you how to create and modify templates in ExamWRITER, including how

- To create a new ExamWRITER template, 79

- To modify the name of an existing ExamWRITER template, 80

- To modify an existing ExamWRITER template, 82

▶ **To create a new ExamWRITER template**

For more information on creating templates, see the OSSU 110 "Setting Up & Using Templates" iTrain and the OSSU 600-4 "Using Templates" training course.

A new, blank template is a blank EMR with no patient name associated with it.

1 From the ExamWRITER main window, click **Tools** and select **Template Maintenance.**

The **Template Maintenance** window opens.

2 Click **New**.
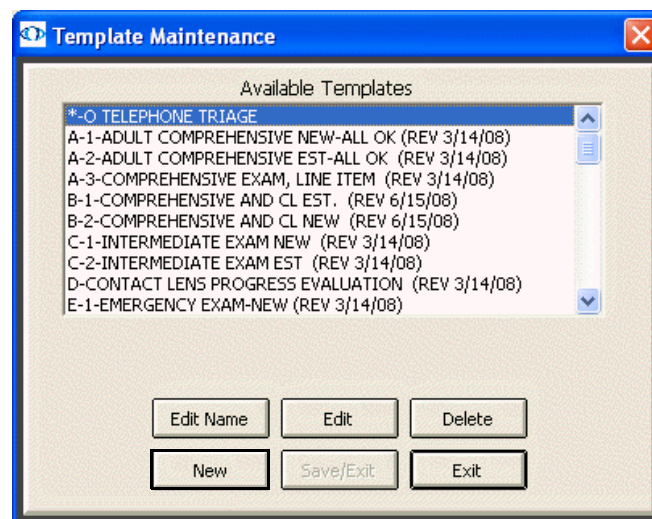
3 Type the name of the template in the **Template Name** text box.

4   If you want to copy an existing template to a new template, select an available template and click **Copy From**.

OR

Click **Save/Exit** to close the Template Maintenance window.
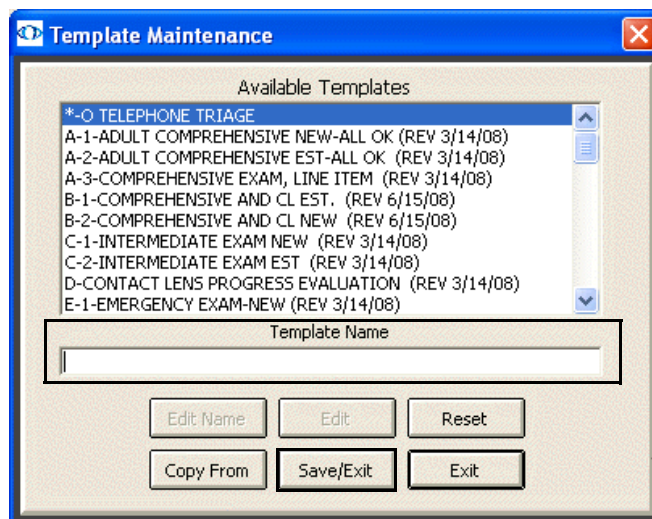
A new exam template opens.

5   Add default exam information to the blank template using the instructions in Creating, Modifying, & Viewing EMRs on page 77.

6   Click the **X** in the top right corner of the window to save and close the template.

▶ To modify the name of an existing ExamWRITER template

1   From the ExamWRITER main window, click **Tools** and select **Template Maintenance.**

The **Template Maintenance** window opens.

2   Select one of the available templates and click **Edit Name**.
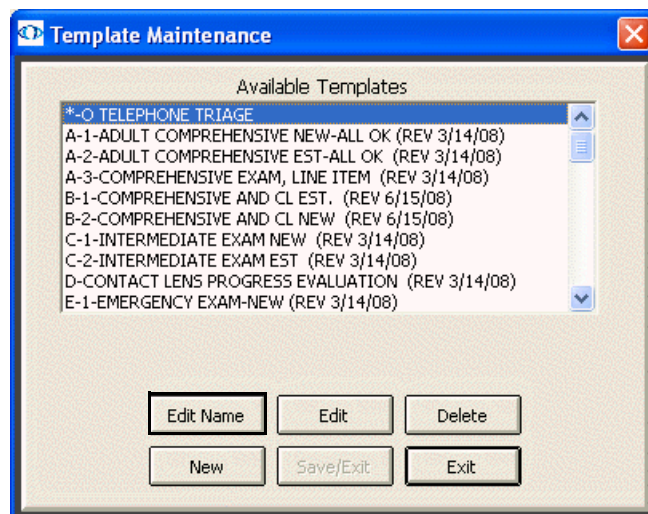
3   Modify the name of the template in the **Template Name** text box.
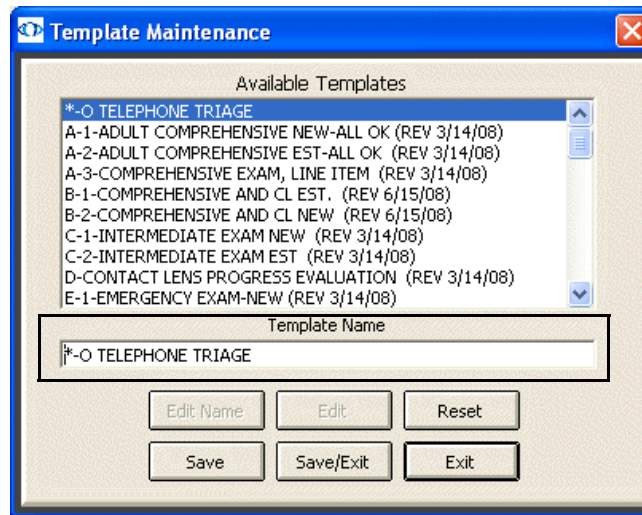
4   Click **Save/Exit** to close the Template Maintenance window.

▶ To modify an existing ExamWRITER template

1   From the ExamWRITER main window, click **Tools** and select **Template Maintenance.**

The **Template Maintenance** window opens.

2   Select one of the available templates and click **Edit**.
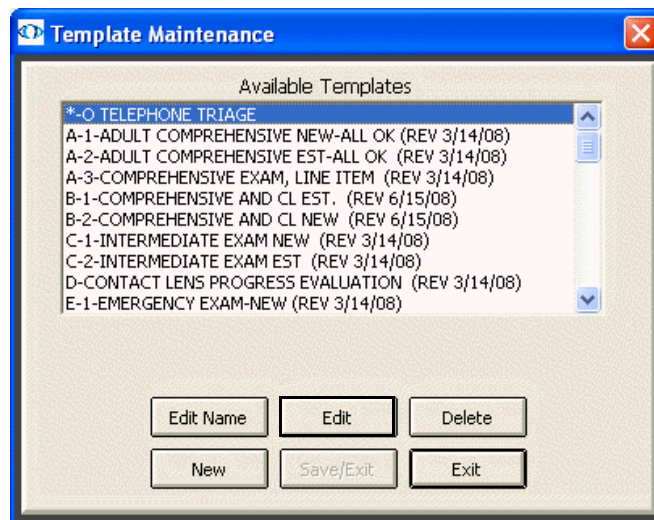
The template opens.

3   Add default exam information to the blank template using the instructions in Creating, Modifying, & Viewing EMRs on page 77.

4   Click the **X** in the top right corner of the window to save and close the template.

Customizing Exam Data, Exam Text, & Auto Letter Sequences

For more information on using the Menu Editor in ExamWRITER, see the OSSU 109 "Setting Up ExamWRITER" and OSSU 110 "Setting Up & Using Templates" iTrains.

1   On the ExamWRITER main window, click **Tools** and select **Menu Editor**.

The **ExamWRITER Editor** window opens.

2   Select the category in which you want to customize exam data and auto letter sequences.
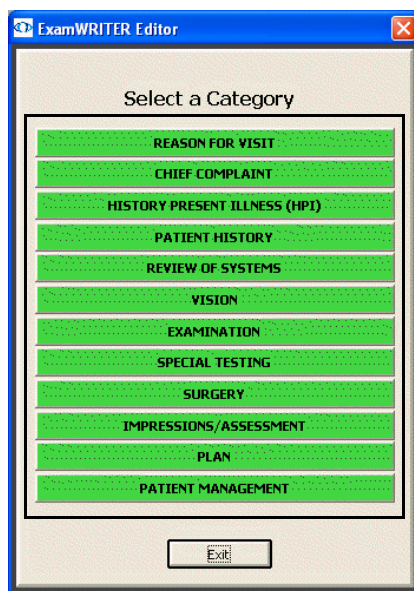
The **Exam, Report and Auto Letter Sequences Editor** window opens.

3   Modify the sequence of exams and auto letters using the arrow buttons on the right side of the Exam Display and Exam Report Sequence box and Auto Letter Sequence box.

Notes	• You can only resequence subcategories within a selected category.
	• Editing subcategory sequences only modifies subcategories in current and new exams; resequencing modifications will *not* be visible in previous exams.
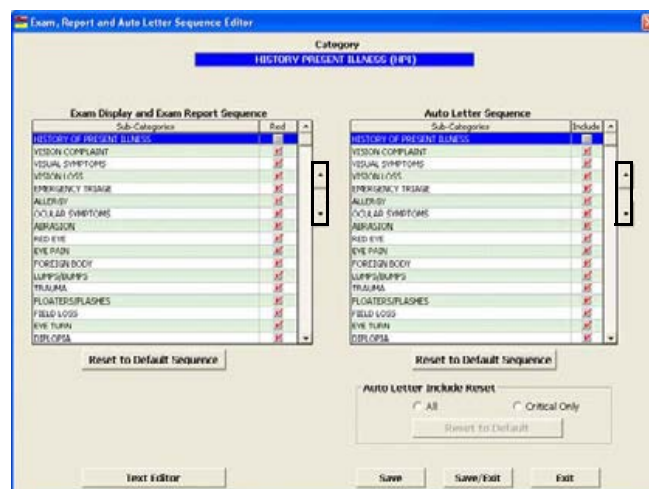
4   Select the **Red** check boxes in the Exam Display and Exam Report Sequence box to display subcategories in red text on the ExamWRITER chart window.

5   Deselect the **Include** check boxes in the Auto Letter Sequence box to exclude data from auto letters.

Notes	• Click the **Reset to Default Sequence** buttons to reset the Include and Red check boxes to the default settings.
	• Select the appropriate **Auto Letter Include Reset** radio button to print all exam information or only critical exam information. The default format is Critical Only. Printing critical information will only print medical information in the category that appears in red text in the exam record.

6   Click **Text Editor** to customize descriptive exam text; otherwise, go to step 11.

The **ExamWRITER Text Editor** window opens.

7   Double-click a subcategory to customize the exam text within the category.
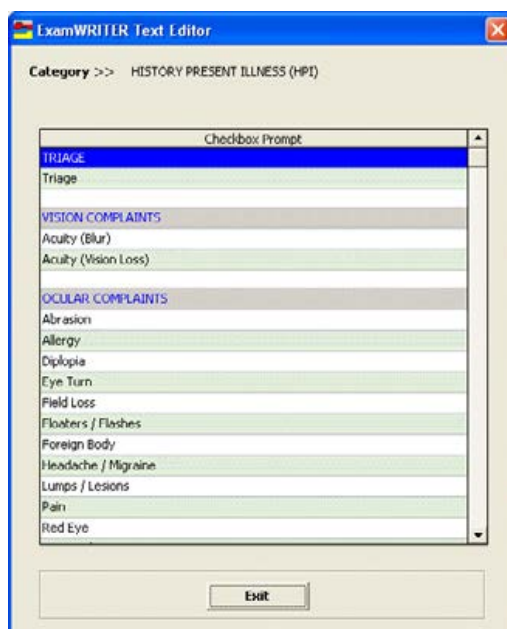
8   Double-click on a string of User's Text, modify the text, and click **Save**.

Notes	• Modifying text within subcategories does not alter check box prompts in ExamWRITER windows; instead, it populates the Expanded Description text box in ExamWRITER windows with your modified subcategory text.
	• Editing text within subcategories only modifies text in current and new exams; text modifications will *not* be visible in previous exams.
	• Right-click on a string of Default Text and select **Copy Default Text** to copy the default text to the User's Text.
	• Click **Reset CURRENT Changes to Default Text** to reset the sequences to the default settings prior to clicking Save or Save/Exit. After you save the text, you cannot reset the modified text back to your default text.
	• Click **Return to Sequence Editor** to return to the Exam, Report and Auto Letter Sequence Editor window.
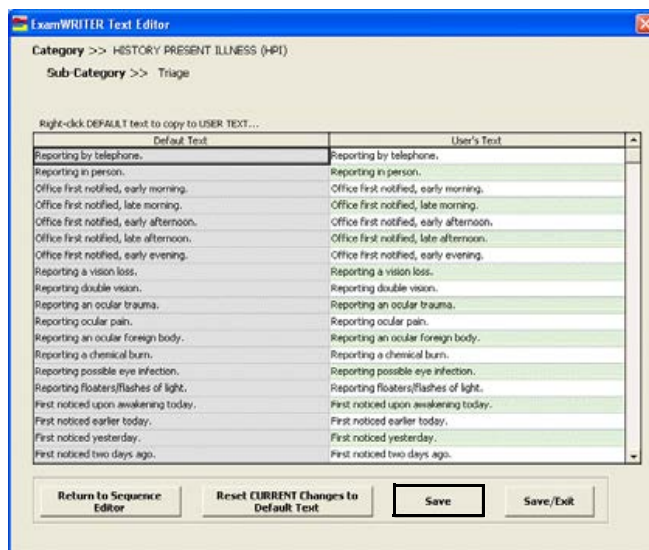
9   Click **Save/Exit** to close the ExamWRITER Text Editor window.

10   Double-click on another subcategory in the ExamWRITER Text Editor window and repeat steps 8–9 or click **Exit** to close the window.

11   Click **Save/Exit** to close the Exam, Report and Auto Letter Sequence Editor window.

12   Click **Exit** to close the ExamWRITER Editor window.

13   Close and reopen ExamWRITER to view your changes in the ExamWRITER chart window.

Using the Quick List

You can use the Quick List to view and access patient demographic and exam information. Patients are added to the Quick List each time you open their exams, when their appointments are scheduled on the current day, or when you modify their information in the Patient Information Center or Patient Demographics window on the current day. The Quick List can be very beneficial to network users because every time a patient's record is accessed at one computer, it is added to the Quick List and can be accessed at other computers in the network. This section tells you how to use the Quick List, including how

- To open the Quick List, 87
- To add patients to the Quick List, 88
- To use the Quick List, 89
- To remove patients from the Quick List, 90

For more information on using the Quick List, see the OSSU 601 "Using the Control Center" iTrain.

▶ To open the Quick List

Open the Patient Quick List window using one of the following methods:

- Click the **QuickList** icon on the ExamWRITER chart window.

- Click **Tools** on the ExamWRITER main window toolbar and select **Show Patient Quick List**.

  The **Patient Quick List** window opens.

Notes	• The Patient Quick List that is visible on the ExamWRITER chart window is for viewing purposes *only*; you cannot modify patient demographic information or create new exams from the Patient Quick List in the ExamWRITER chart window.
	• If you want the Patient Quick List to display automatically when you open ExamWRITER, select the **Yes** radio button next to the Show Patient Quick List default system preference. For more information on modifying default ExamWRITER preferences, go to To define and change default preferences on page 59.
	• To sort the list by patient, phone number, or appointment, click on the column headings.
	• When a patient's exam has been closed or finalized, the Room column automatically displays the text "CLOSED."
	• The Prov column displays the provider's initials and provider ID (which is also displayed in the ID # box next to the provider's name on the Provider/Staff tab on the Business Names window).
	• Although the Quick List automatically refreshes, you can click **Refresh** to refresh the Quick List manually.
	• To display patients with appointments only, select the **Appointment Only** check box and click **Refresh**.
	• To display patients who are assigned to all providers, select the **All Providers** check box. To display patients who are assigned only to the provider logged into ExamWRITER, deselect the **All Providers** check box. The All Providers check box is *only* active when a provider is logged into ExamWRITER. Staff members logged into ExamWRITER will see all providers listed in the Quick List.

▶ To add patients to the Quick List

1   Click **Tools** on the ExamWRITER main window toolbar and select **Show Patient Quick List**.

     The **Patient Quick List** window opens.

2   Click **New**.
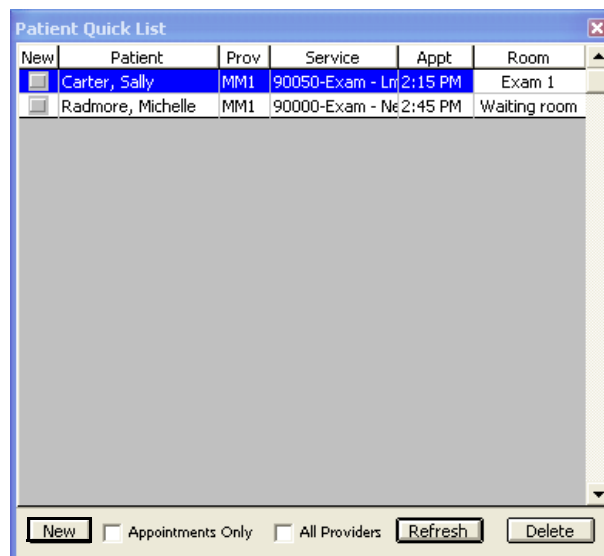
     The **Patient Demographic** window opens.

3   Use the instructions in To add new patient demographic information on page 68 to add a new patient record.

   The patient appears in the Quick List after you click **OK** on the Patient Demographic window.

▶ To use the Quick List

Use the Quick List in one of the following ways:

• Click on a patient's name in the Patient Quick List window and drag and drop the patient on the **F2 - Find** button, **Last Name** text box, or **First** text box on the ExamWRITER Control Center to populate the ExamWRITER Control Center with the patient's information.

• Drag and drop the patient on the **Patient Hx** icon on the ExamWRITER Control Center to open the Patient Information Center.

• Right-click on a patient's name and select **Patient History** to open the Patient Information Center and modify the patient's information.

• Right-click on a patient's name and select **New Exam** to begin creating a new exam record for the patient.

• Right-click on a patient's name and select **Room** to open the Patient Room window, select the room in the office where the patient is currently located, and click **Save** to denote the patient's location on the Patient Quick List.

Note	To maintain a list of office room locations, open the Customization window in OfficeMate (or go to To modify list box selections on page 47 if you are a standalone ExamWRITER user), click the **List Box Selections** tab, and modify the **Room** Entry Field Name.
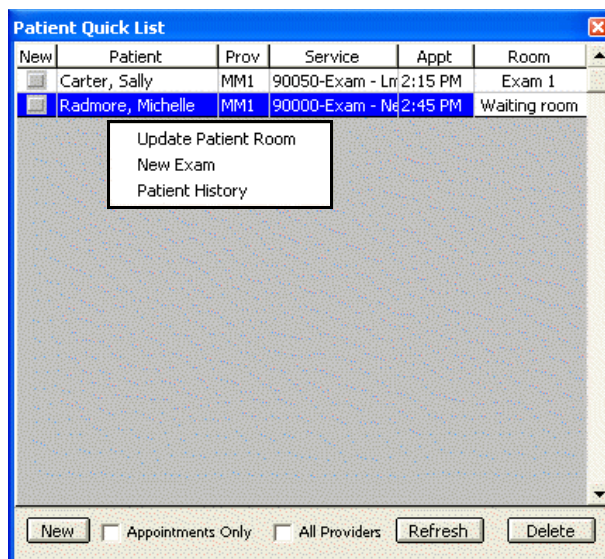
▶   To remove patients from the Quick List

1   Click **Tools** on the ExamWRITER main window toolbar and select **Show Patient Quick List**.

The **Patient Quick List** window opens.

2   Select the patient and click **Remove**.
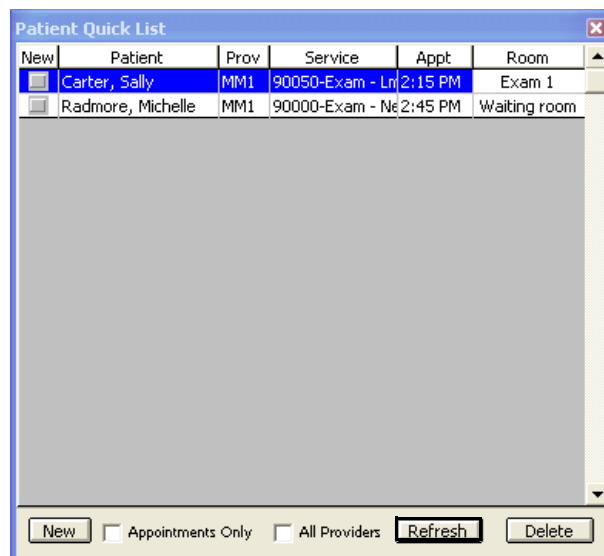
The **Remove Patient** window opens.

3   Click **Yes** to remove the patient from the Quick List.

Searching in ExamWRITER

1   On the ExamWRITER chart window, click the **Search** icon or press **F5**.

The **Keyword Search** window opens.

2   Type the text that you want to search for in the **Search for** text box.

3   Click **Find**.
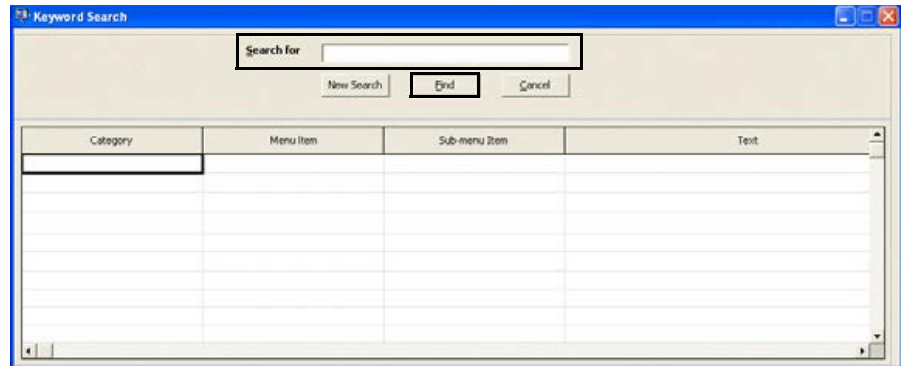
The results of your search are displayed.

4   Write down the Category, Menu Item, and Sub-menu Item of the text that you searched for and navigate to it.

Note	You cannot double-click on the search results to navigate to the text that you searched for. You also cannot print the search results.

5   Click **New Search** to start a new search or **Cancel** to close the Keyword Search window.

Creating, Modifying, & Viewing EMRs

In this chapter:

The ExamWRITER chart window is organized for you to follow the SOAP (Subjective, Objective, Assessment, Plan) methodology when you are entering information into an EMR. Click the **Chief Complaint** and **Patient Hx – ROS** tabs to enter subjective information into an EMR. Click the **Vision/Rx** and **Exam - Special Tests** tabs to enter objective information into an EMR. Click the **Surgery - Plan - Mgmt** tab to enter assessment and plan information into an EMR.

Creating New Patient Exam Records

This section tells you how to create a new patient exam record in OfficeMate and ExamWRITER, including how
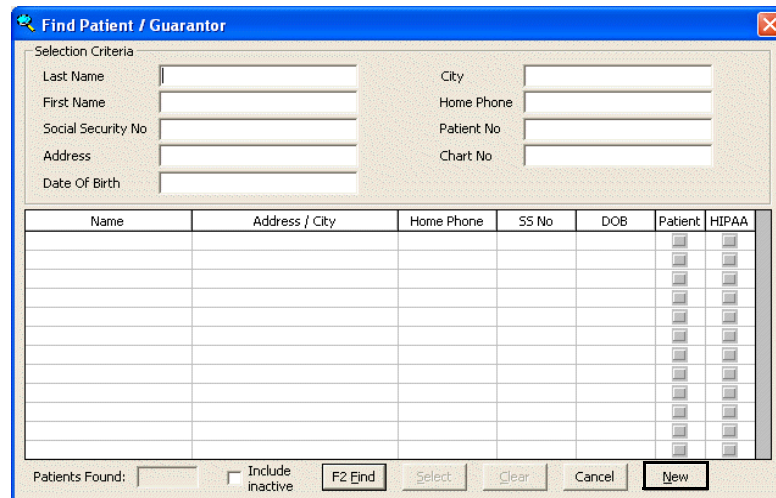
For more information on creating a new patient exam record, see the OSSU 601 "Using the Control Center" iTrain and the OSSU 600-1 "Documenting Pretests" training course.

▶ **To create a new exam record for a new patient using OfficeMate**

1   Click the **Patients** icon in OfficeMate.

The **Find Patient/Guarantor** window opens.

2   Click **New**.
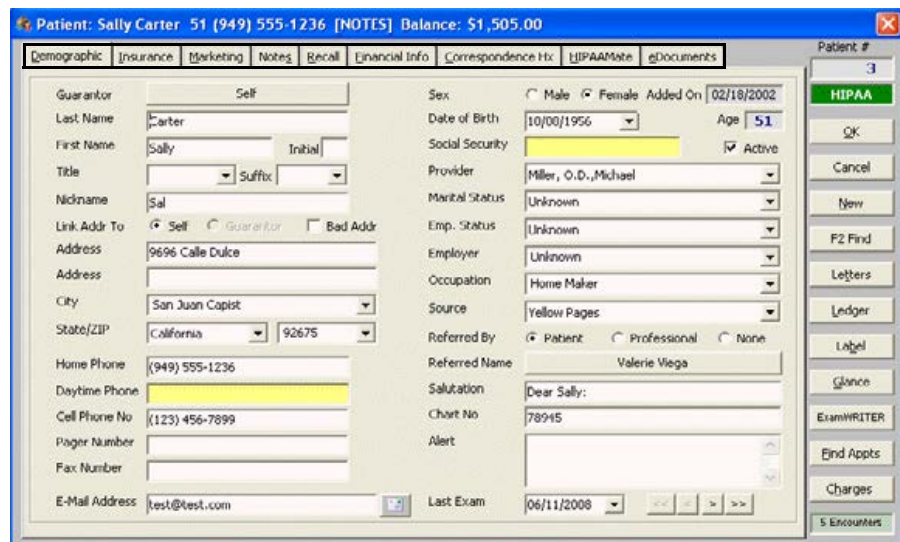
The **Add New Patient Record** window opens.

3   Follow the instructions in the "Creating, Modifying, & Deleting Patient Records" chapter in the *OfficeMate User's Guide* to record new patient information in the Demographic, Insurance, Marketing, Notes, Recall, Financial Info, Correspondence History, HIPAAMate, and eDocuments tabs.

4   Click **ExamWRITER** or right-click on the Patient Demographic window's blue title bar and select **ExamWRITER** to open a new ExamWRITER EMR.

The **ExamWRITER Control Center** window opens.

5   Click **New Exam**.

6   Click **Create New Blank Exam**.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons to view the patient notes and alerts.

OR

Double-click on an available template.

For more information on creating and using templates, go to Creating and Modifying Templates on page 65.

A new exam opens.

▶ To create a new exam record for an existing patient using OfficeMate

1 Click the **Patients** icon in OfficeMate.

The **Find Patient/Guarantor** window opens.

2 Enter search information in the **Selection Criteria** text boxes and click **F2 Find**.

3 Click on the patient and then click **Select**.

The **Patient** window opens.

4 Click **ExamWRITER** or right-click on the Patient Demographic window's blue title bar and select **ExamWRITER** to open a new ExamWRITER EMR.

The **ExamWRITER Control Center** window opens.

5   Click **New Exam** if there are no previous exams on file and go to step 6.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons to view the patient notes and alerts.

OR

Right-click on a previous exam and select **Copy forward to New Exam** to copy a patient's previous exam to a new exam. A new exam opens.

Note	If there are no closed or finalized exams for a patient, then the patient will have no previous exams recorded in ExamWRITER

6   If you are creating a new exam, click **Create New Blank Exam**.

OR

Double-click on an available template.

For more
information on
creating and using
templates, go to
Creating and
Modifying
Templates on page
65.

A new exam opens.

▶ To create a new exam record for a new patient using ExamWRITER

1   Complete the instructions in Maintaining Patient Demographic Information on page 53 to add new patient demographic information to the ExamWRITER database.

2   From the ExamWRITER Control Center, enter search information in the **Patient Information** text boxes and click **F2-Find**.

If the **Find Patient** window opens with a list of patients meeting your selection criteria, go to step 3.

If the **ExamWRITER Control Center** window opens, go to step 4.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons on the ExamWRITER Control Center to view the patient notes and alerts.

3   Double-click on the patient for whom you want to create a new EMR.

OR

Click on the patient for whom you want to create a new EMR and then click **Select**.

The **ExamWRITER Control Center** window opens.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons to view the patient notes and alerts.

4   Click **New Exam**.

5   Click **Create New Blank Exam**.

OR

Double-click on an available template.

For more
information on
creating and using
templates, go to
Creating and
Modifying
Templates on page
65.

A new exam opens.

▶ **To create a new exam record for an existing patient using ExamWRITER**

1   From the ExamWRITER Control Center, enter search information in the **Patient Information** text boxes and click **F2-Find**.

If the **Find Patient** window opens with a list of patients meeting your selection criteria, go to step 2.

If the **ExamWRITER Control Center** window opens, go to step 3.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons on the ExamWRITER Control Center to view the patient notes and alerts.

2   Double-click on the patient for whom you want to create a new EMR.

OR

Click on the patient for whom you want to create a new EMR and then click **Select**.

The **ExamWRITER Control Center** window opens.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons to view the patient notes and alerts.

3　Click **New Exam** if there are no previous exams on file.

OR

Right-click on a previous exam and select **Copy forward to New Exam** to copy a patient's previous exam to a new exam.

Note	If there are no closed or finalized exams for a patient, then the patient will have no previous exams recorded in ExamWRITER

4   Click **Create New Blank Exam**.

OR

Double-click on an available template.

For more information on creating and using templates, go to Creating and Modifying Templates on page 65.

A new exam opens.

Opening Saved Patient Exam Records

For more information on opening saved patient records, see the OSSU 601 "Using the Control Center" iTrain and the OSSU 600-1 "Documenting Pretests" training course.

1   If the patient has an open exam record, double-click the patient's name on the **Open Charts** tab on the ExamWRITER Control Center window; otherwise, go to step 2.

The saved patient exam opens.

For more information on searching for charts, see the OSSU 601 "Using the Control Center" iTrain.

Note	To open a closed, finalized, or deleted exam record, click the **Chart Search** tab on the **ExamWRITER Control Center**, enter the appropriate date and status search criteria, and then double-click the patient's name. OSSU 601 "Using the Control Center"

eyefinity/OfficeMate

2 If the patient does not have an open exam record, enter search information in the **Patient Information** text boxes in the ExamWRITER Control Center and click **F2-Find**.

The **Find Patient** window opens with a list of patients meeting your selection criteria.

3 Double-click on the patient for whom you want to create a new EMR.

OR

Click on the patient for whom you want to create a new EMR and then click **Select**.

The **ExamWRITER Control Center** window opens.

Note	If the patient record has notes and alerts recorded, click the **Show** buttons to view the patient notes and alerts.

4   Double-click on a previous exam.

Note	If there are no closed or finalized exams for a patient, then the patient will have no previous exams recorded in ExamWRITER

The saved patient exam opens.

Recording Chief Complaint Information

This section tells you how to record chief complaint information in ExamWRITER, including how

- To record reason for visit information, 107

- To record chief complaint information, 110

- To record history of present illness (HPI) information, 111

- To modify chief complaint information, 113

Note	To select Chief Complaint as your default exam view, go to To define and change general preferences on page 55.

For more information on recording Chief Complaint information, see the OSSU 602 "Navigating in ExamWRITER" iTrain and the OSSU 600-1 "Documenting Pretests" training course.

▶ **To record reason for visit information**

Note	Press the **F12** key in the Occupation, Notes, Last Eye Exam, and Exam type boxes to open a Code Maintenance window and add descriptions to the fields. When you are adding exam types to the Exam type box, you must type a long and short description in the Code Maintenance window. For more information on using the Code Maintenance window, go to To use the F12 key on page 24.

1   Click the **Chief Complaint** tab on the ExamWRITER chart window.

2   Click the **Reason for Visit** bar.

The **Reason for Visit** window opens.

3   Click your cursor in the **Notes** text box to open a drop-down menu and select notes for the patient's record.

Note	To select multiple notes, left-click in the Notes text box and use the left button on your mouse to select multiple notes. After you have selected all of the patient's notes, right-click to insert the notes into the text box.

4   Click your cursor in the **Occupation** text box to open a drop-down menu and select the patient's occupation.

5   Type or select the patient's last office visit date in the **Last Office Visit** text box.

6   Type or select the patient's last physical exam date in the **Last Physical Exam** text box.

7   If the patient completed his or her last eye exam at another practice, select the time period when the patient had his or her last eye exam from the **Last Eye Exam (elsewhere)** drop-down menu.

8   Select the exam technician from the Exam Technician drop-down menu.

Note	The Exam Technician menu is populated from the OfficeMate list of providers.

9   Click the **...** (ellipse) next to the **Primary Care Physician** text box to open the Primary Care Physician window and double-click the primary care physician.

Note	To add a new primary care physician to the Primary Care Physician window, click **New** and go to To create a new correspondent on page 52 for more information.

10   Click the **...** (ellipse) next to the **Other Physician** text box to open the Other Doctor window and double-click the other physician.

Note	To add a new physician to the Other Doctor window, click **New** and go to To create a new correspondent on page 52 for more information.

11   If you have not already select a referring provider in OfficeMate, select the **PCP** (primary care physician), **Other Physician**, or **None** radio button in the **Referred by** box.

12   Double-click exam types from the **Exam type** table to add them to the Selected Exam Types box.

Notes	• You can only select six exam types (i.e., procedures) to add to the Select Exam Types box.
	• To remove an exam type from the Selected Exam Types box, select the exam type and click the **Remove Item** arrow.
	• To rearrange the exam types in the Selected Exam Types box, click the arrows to the left of the table. You can move exam types up or down one row at a time, move an exam type to the top of the list to make it the primary exam type (click the **Make Primary** arrow), or move an exam type to the bottom of the list.

13   Click **Process** or right-click anywhere in the Reason for Visit window.

▶ To record chief complaint information

1   Click the **Chief Complaint** tab on the ExamWRITER chart window.

2   Click the **Chief Complaint** bar.

The **Chief Complaint** window opens.

3   Select the appropriate complaint(s) in the box on the left side of the window.

Notes	• To create and maintain complaints in the box on the left side of the window, place your cursor in the Search text box and press the **F12** key.
	• To search for complaints already in the box on the left side of the window, type text into the **Search** text box.
	• To include custom text, click **Custom Text** and type the custom text into the text box.

4   Select an eye from the Eye drop-down menu.

5   Choose the appropriate dates from the **Timeline** drop-down menus. If you want to select an exact date, click the **...** (ellipse) to open the calendar and select an exact date. If you want to select today's date, select the **Today** check box.

Note	If you want to include timeline information for custom text, select the **Include TIMELINE** check box.

6   Click **Save Item**.

Notes	• To delete a chief complaint that you have saved in the Chief Complaint table at the bottom of the window, select the chief complaint and click **Delete Item**.
	• To delete all of the chief complaints that you have saved in the Chief Complaint table at the bottom of the window, click **Delete All**.

7   Click **Process**.

▶ ## To record history of present illness (HPI) information

1   Click the **Chief Complaint** tab on the ExamWRITER chart window.

2   Click the **History of Present Illness (HPI)** bar.

The **History of Present Illness** window opens.

3   Select the **ALL OK (Except)** check box and any appropriate **Triage**, **Vision Complaints**, **Symptoms**, and **Progress HPI** check boxes.

Notes	• Select the **Triage**, **Vision Complaints**, **Symptoms**, and **Progress HPI** check box(es) only if there are exceptions to the patient's healthy medical history; otherwise, only select the **ALL OK (Except)** check box.
	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4   Click **Process** or right-click anywhere in the History of Present Illness window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

Note	If you select the **Common Ocular Complaints** check box and you are using the HPI Wizard, follow the instructions below to document the ocular complaints. To turn on the HPI Wizard and make the technician's job of documenting complaints worry-free, go to To define and change general preferences on page 55.
	1 Search for and select a complaint in the box on the left side of the window (press the **F12** key to add a complaint to the box).
	2 Select an eye from the **Eye** drop-down menu.
	3 In the Keyword and Long Description text boxes, left-click to select the appropriate items from the drop-down menu list and then right-click to save your selections. To modify or add keywords and long descriptions, left-click in a Keyword text box and press the **F12** key.
	4 If you prefer to add custom text instead of using the HPI Wizard, click the **Custom Text** button and type the text in the **Custom text** box.
	5 Click **Save Item** to add the complaint to the Ocular Complaint table at the bottom of the window. To edit a saved complaint, click **Edit** and modify the text. To delete all complaints, click **Delete All**; or, to delete one complaint, select it and click **Delete Item**.
	6 After you have finished documenting all ocular complaints, click **Process**.

7   Select or deselect the appropriate check boxes and click **Process**.

► **To modify chief complaint information**

1   Click the **Chief Complaint** tab on the ExamWRITER chart window.

2   Click the **Reason for Visit**, **Chief Complaint**, and **History of Present Illness (HPI)** bars or click on a bold Reason for Visit, Chief Complaint, or History of Present Illness subheading in the ExamWRITER chart window and follow the instructions above for recording information in an EMR.

Notes	• After you have finished recording Chief Complaint information in an EMR, the **Reason for Visit**, **Chief Complaint**, and **History of Present Illness (HPI)** bars change in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Recording Patient Hx – ROS Information

This section tells you how to record patient history and review of systems (ROS) information in ExamWRITER, including how

• To record patient history information, 113

• To record review of systems information, 116

• To modify patient Hx – ROS information, 117

For more information on recording Patient Hx and ROS information, see the OSSU 602 "Navigating in ExamWRITER" iTrain and the OSSU 600-1 "Documenting Pretests" training course.

► **To record patient history information**

1   Click the **Patient Hx – ROS** tab on the ExamWRITER chart window.

2   Click the **Patient History** bar.

The **Patient History** window opens.

3   Select the **ALL OK Patient History** check box and any appropriate **Except** and **Neuro/Pysch** check boxes.

Notes	• Select the **Except** and **Neuro/Pysch** check box(es) only if there are exceptions to the patient's healthy medical history; otherwise, only select the **ALL OK Patient History** check box.
	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4   Click **Process** or right-click anywhere in the Patient History window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

5   Select or deselect the appropriate check boxes and click **Process**.

Notes	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.

• To clear previous selections on the form, click **Reset Form**.

• If a **Current Information** window opens, choose the appropriate button at the bottom of the window to chance, add, reselect, or delete the previously entered text.

• To add systemic medications to a patient's history, double-click the medication name in the **Patient SYSTEMIC Medications** window and then click **Save/Exit**. To record a medication as being discontinued, select the patient medication, click **Discontinue**, select a date from the **Discontinue Date** calendar, and click **Save**. The medication's status is marked as discontinued and it is removed from the list of medications. To unmark a medication as being discontinued, go to Viewing & Refilling Prescriptions on page 238. To denote if the patient is allergic to a medication, select the **Allergic** check box next to the medication.

• To add information to the Social History window, select the check box or appropriate radio buttons, type custom text in the **Custom Text** text box (if desired), click **Update List**, and click **Process** or right-click in the window.

• To add information to a patient's medical, ocular, systemic surgical, ocular surgical history, ocular family history, and systemic family history, select the appropriate text in the box on the left of the **Medical History**, **Ocular History**, **Systemic Surgical History**, **Ocular Surgical History**, **Ocular Family History**, and **Systemic Family History** windows, choose the appropriate dates from the **Timeline** drop-down boxes (and family members, if appropriate), and click **Save Item**, **Save(s)**, or right-click in the window. To create and maintain keywords, place your cursor in the Search text box and press the **F12** key. To search for keywords, type text into the **Search** text box.

• To add custom text in the **Medical History**, **Ocular History**, **Systemic Surgical History**, **Ocular Surgical History**, **Ocular Family History**, and **Systemic Family History** windows, click **Custom Text**, type text in the **Custom text** box, select **Include TIMELINE** if appropriate, choose the appropriate dates from the **Timeline** drop-down boxes (and family members, if appropriate), and click **Save Item**, **Save(s)**, or right-click in the window.

• To clear previous selections on the form, click **Clear**.

• To delete saved information, click **Delete All**; or, to delete one piece of information, select it and click **Delete Item**.

▶   To record review of systems information

1   Click the **Patient Hx – ROS** tab on the ExamWRITER chart window.

2   Click the **Review of Systems** bar.

       The **Review of Systems** window opens.

3   Select the **ALL OK** and appropriate **Except** check boxes.

Note	• Select the **Except** check box(es) only if there are exceptions to the patient's healthy medical systems; otherwise, only select the **ALL OK** check box.
	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4   Click **Process** or right-click anywhere in the Review of Systems window.

       Depending on the boxes that you checked, various windows will open with additional check boxes.

5   Select or deselect the appropriate check boxes and click **Process**.

Notes	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.
	• If a **Current Information** window opens, choose the appropriate button at the bottom of the window to chance, add, reselect, or delete the previously entered text.

▶ To modify patient Hx – ROS information

1   Click the **Patient Hx – ROS** tab on the ExamWRITER chart window.

2   Click the **Patient History** and **Review of Systems** bars and follow the
    instructions above for recording information in an EMR.

    OR

    Click on a bold subheading in the ExamWRITER chart window.

    The **Current Information** window opens.

3   Choose the appropriate button at the bottom of the window to change, add,
    reselect, or delete the previously entered text.

Notes	• If you click **Change/Add**, your previous selections are still selected and you can change or add to them.
	• If you click **Re-Select**, your previous selections are deleted and you must reselect new information.
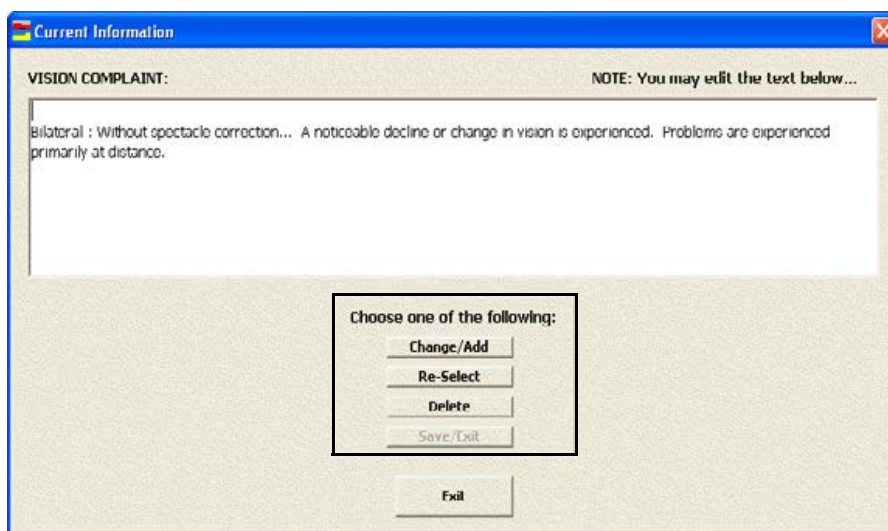
Notes	• After you have finished recording patient Hx – ROS information in an EMR, the **Patient History** and **Review of Systems** bars change in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Recording Vision/Rx Information

You can record vision and prescription information for spectacles, contact lenses, and binoculars in an ExamWRITER EMR. This section includes the following topics:

- Recording Ancillary Testing Information, 118
- Recording Spectacle Vision/Rx Information, 120
- Recording Contact Lens Vision/Rx Information, 150
- Recording Binocular Vision/Rx Information, 175

For more information on recording vision and Rx information, see the OSSU 602 "Navigating in ExamWRITER" iTrain and the OSSU 600-2 "Documenting the Exam" training course.

Recording Ancillary Testing Information

This section tells you how to record ancillary testing information in ExamWRITER, including how

- To record ancillary testing information, 118
- To modify ancillary testing information, 119

▶ **To record ancillary testing information**

1   Click the **Vision/Rx** tab on the ExamWRITER chart window.

2   Click the **Vision** bar.

The **Vision/Rx** window opens.

3   Select the appropriate **Other Vision Tests** check boxes.
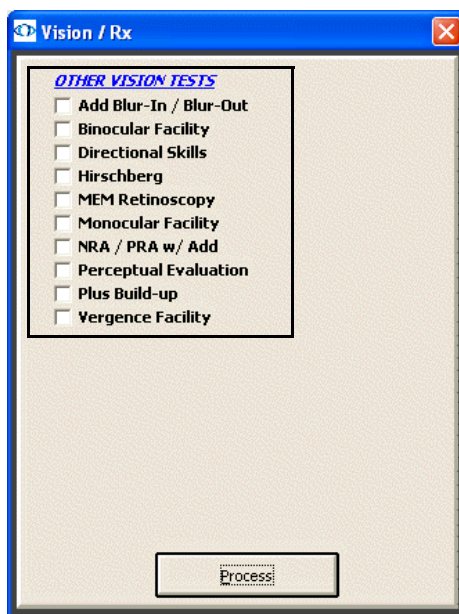
Note	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4   Click **Process** or right-click anywhere in the Vision/Rx window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

5   Select or deselect the appropriate check boxes and click **Process**.

Notes	• To record selected information for the right, left, or both eyes, first click **OD**, **OS**, or **OU** and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.
	• If a **Current Information** window opens, choose the appropriate button at the bottom of the window to change, add, reselect, or delete the previously entered text.

▶ To modify ancillary testing information

1   Click the **Vision/Rx** bar and follow the instructions above for recording information in an EMR.

OR

Click on a bold subheading in the ExamWRITER chart window.

The **Current Information** window opens.

2   Choose the appropriate button at the bottom of the window to change, add, reselect, or delete the previously entered text.

Notes	• If you click **Change/Add**, your previous selections are still selected and you can change or add to them.
	• If you click **Re-Select**, your previous selections are deleted and you must reselect new information.

Recording Spectacle Vision/Rx Information

This section tells you how to record spectacle vision and prescription information in ExamWRITER, including how

To record and modify vision and prescription spectacle information in an EMR, click the **Vision/Rx** tab on the ExamWRITER chart window and then click the **Spectacle** tab on the Vision bar.

▶ To record and modify unaided acuities

1   Click in the **Unaided Acuities** box in the top left of the Vision/Rx
     ExamWRITER chart window.

     The **Unaided Visual Acuities** window opens.

2   Click on the appropriate measurements to add them to the **OD**, **OS**, and **OU**
     text boxes.

     OR

     Type the appropriate measurements into the **OD**, **OS**, and **OU** text boxes.

3   If you want to add visual acuity impressions and observations to the EMR, click
     Observations; otherwise, go to step 5.

     The **VISUAL ACUITY Impressions/Observations** window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

▶ **To record and modify the presenting spectacle Rx**

1   Click in the **Presenting Spectacle Rx** box in the top middle of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Presenting** tab on the **Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add measurements to the **Spectacle – Presenting OD**, **OS**, and **OU** text boxes.

OR

Type the appropriate measurements in the **Spectacle – Presenting OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4   Select the prescription's usage from the **Usage** drop-down menu.

5   Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or **Near** text box to open the Pulpillary Distance window and record pulpillary distance measurements.

6   If you want to copy the presenting prescription to the subjective manifest prescription, click **Copy to Manifest** and go to .

7   If you want to copy the presenting prescription to the objective retinoscopy prescription, click **Copy to Obj. Retin** and go to .

8   If you want to copy the presenting prescription to the final prescription, click **Copy to Final** and go to .

9   If you want to create multiple presenting spectacle prescriptions, click **New Rx** and follow the steps above to create additional presenting spectacle prescriptions.

Notes	• Click the arrows under **#/of** to view other presenting spectacle prescriptions.
	• If you are an OfficeMate user, click the arrow buttons in the OfficeMate Eyewear Order window to view the multiple prescriptions.

10   If you want to add presenting spectacle prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 13.

The **PRESENTING SPECTACLE Rx Impressions/Observations** window opens.

11   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

12 Click **Save/Exit**.

13 Click **Save/Exit** to close the Rx window.

▶ ## To record and modify the objective spectacle auto refraction Rx

1 Click in the **Auto Refraction** box in the middle left of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Obj – Auto Ref.** tab on the **Rx** window.

2 Click on the blue slider bar or on the measurement buttons to add measurements to the **Spectacle – Auto Refraction OD** and **OS** text boxes.

OR

Type the appropriate measurements in the **Spectacle – Auto Refraction OD** and **OS** text boxes.

Notes	• You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.
	• If you want to make the OD and OS prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3 If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4 Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or **Near** text box to open the Pulpillary Distance window and record pulpillary distance measurements.

5 If you want to add autorefraction spectacle prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 8.

The **AUTO-REFRACTION Impressions/Observations** window opens.

6   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

7   Click **Save/Exit**.

8   If you want to copy the autorefraction prescription to the subjective manifest prescription, click **Copy to Manifest** and go to To record and modify the subjective spectacle manifest Rx on page 129.

9   Click **Save/Exit** to close the Rx window.

▶ To record and modify the objective spectacle retinoscopy Rx

1   Click in the **Retinoscopy** box in the middle of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Obj-Retin.** tab on the **Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add measurements to the **Spectacle – Retinoscopy OD** and **OS** text boxes.

OR

Type the appropriate measurements in the **Spectacle – Retinoscopy OD** and **OS** text boxes.

Notes	• You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.
	• If you want to make the OD and OS prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4   Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or **Near** text box to open the Pulpillary Distance window and record pulpillary distance measurements.

5   If you want to add retinoscopy spectacle prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 8.

The **RETINOSCOPY Impressions/Observations** window opens.

6   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

7   Click **Save/Exit**.

8   If you want to copy the retinoscopy prescription to the subjective manifest prescription, click **Copy to Manifest** and go to To record and modify the subjective spectacle manifest Rx on page 129.

9   Click **Save/Exit** to close the Rx window.

▶ To record and modify the subjective spectacle manifest Rx

1 Click in the **Manifest** box in the middle left of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Sub-Manifest** tab on the **Rx** window.

2 Click on the blue slider bar or on the measurement buttons to add measurements to the **Spectacle – Manifest OD**, **OS**, and **OU** text boxes.

OR

Type the appropriate measurements in the **Spectacle – Manifest OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3 If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4 Click the Show Binocular **Yes** radio button to display or record binocular measurements.

Note	To record binocular measurements, click in a Binocular text box and follow the instructions in Recording Binocular Vision/Rx Information on page 175.

5 Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or **Near** text box to open the Pulpillary Distance window and record pulpillary distance measurements.

6   If you want to add subjective response spectacle prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 9.

The **SUBJECTIVE RESPONSES Impressions/Observations** window opens.

7   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

8   Click **Save/Exit**.

9   If you want to copy the manifest prescription to the cycloplegic prescription, click **Copy to Cycloplegic** and go to To record and modify the subjective spectacle cycloplegic Rx on page 130.

10 If you want to copy the manifest prescription to the final prescription, click **Copy to Final** and go to To record and modify the final spectacle Rx on page 132.

11 Click **Save/Exit** to close the Rx window.

▶   To record and modify the subjective spectacle cycloplegic Rx

1   Click in the **Cycloplegic** box in the middle right of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Sub-Cyclo.** tab on the **Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add measurements to the **Spectacle – Cycloplegic OD**, **OS**, and **OU** text boxes.

OR

Type the appropriate measurements in the **Spectacle – Cycloplegic OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4   Click the Show Binocular **Yes** radio button to display or record binocular measurements.

Note	To record binocular measurements, click in a Binocular text box and follow the instructions in Recording Binocular Vision/Rx Information on page 175.

5   Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or **Near** text box to open the Pulpillary Distance window and record pulpillary distance measurements.
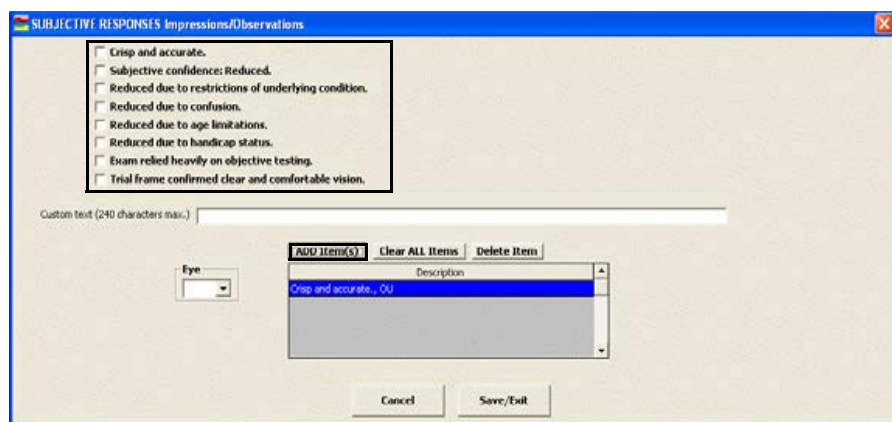
6   If you want to add cycloplegic spectacle prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 9.

The **CYCLOPLEGIC ORDERS Impressions/Observations** window opens.

7   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

8   Click **Save/Exit**.

9   If you want to copy the presenting prescription to the subjective manifest prescription, click **Copy to Manifest** and go to .

10 If you want to copy the presenting prescription to the final prescription, click **Copy to Final** and go to .

11 Click **Save/Exit** to close the Rx window.

▶   To record and modify the final spectacle Rx

1   Click in the **Final Spectacle Rx** box in the bottom left of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Final** tab on the **Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add measurements to the **Spectacle – Final OD**, **OS**, and **OU** and text boxes.

OR

Type the appropriate measurements in the **Spectacle – Final OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4   Select the prescription's usage from the **Usage** drop-down menu.

Note	The usage is copied to the OfficeMate Rx and is printed on the prescription.

5   Select the prescription and expiration dates from the **Prescription Date** and **Expiration Date** drop-down menus.

6   Click the Show Binocular **No** radio button and follow the instructions below to record lens product information and Rx lab order options:

   a.   Type a product code into the OD **Product Code** text box or click the **?** to open the Find Product window and search for a product.

   a.   Type a product name into the OD **Product Name** text box or click the **?** to open the Find Product window and search for a product.

   b.   Select an OD lens category from the **Category** drop-down menu.

   c.   Select an OD lens material from the **Material** drop-down menu.

   d.   If you want to make the OS lens information the same as the OD information, click the **=** button; otherwise, repeat steps 6a–6c for the OS fields.

   e.   Select a lens color from the **Color** drop-down menu.

   f.   Select a lens density from the **Density** drop-down menu and select the **Solid** or **Gradient** radio button.

   g.   If the lens is uncut, select the **Uncut Lens** check box.

   h.   Select add-ons from the **Product Add-Ons** box (hold down the Shift or Ctrl key to select multiple add-ons at the same time) and click the right arrow to move the selected add-ons to the **Add-ons selected** box.

   i.   Type special instructions for the lab in the **Special Instructions to Lab** text box.

j.   Type Rx notes in the **Rx Notes** text box. These notes will print on the ExamWRITER Rx. An Rx Notes flag is displayed on the ExamWRITER chart window, notifying you that there are Rx notes; click this flag to view the notes.

Note	Lab order options are transferred to OfficeMate to enhance communication between the doctor and technical staff.

7   Click the Show Binocular **Yes** radio button to display or record binocular measurements.

Note	To record binocular measurements, click in a Binocular text box and follow the instructions in Recording Binocular Vision/Rx Information on page 175.

8   Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or **Near** text box to open the Pulpillary Distance window and record pulpillary distance measurements.

9   If you want to add final spectacle prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 12.

The **FINAL Rx Impressions/Observations** window opens.

10   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes. • To add custom text, select the appropriate check box and type text in the **Custom text** box. • To clear all items from the Description list, click **Clear ALL Items**. • To delete an item from the Description list, select the item and click **Delete Item**.

11   Click **Save/Exit**.

12   Click **Create Lab Order** or **Update Lab Order** to create or update the final spectacle lab order; or, go to step 13 to post charges without creating a lab order.

An Rx number appears in the **Lab Order** text box.

13   Click **Post Charges ONLY** to post charges without creating a lab order.

Posting charges only is a great feature to use for noninventory items.

The Rx charges are transferred to an OfficeMate fee slip where they are automatically priced.

Note	In order to view the Post Charges ONLY button and post charges without creating a lob order, you must have selected the **Yes** radio buttons of the OfficeMate Interface options preferences. For more information on these preferences, go to To define and change general preferences on page 43.

14   If you want to copy the final prescription to the alternate prescription, click **Copy to Alt. Rx** and go to To record and modify the alternate spectacle Rx on page 137.

15   Click **Print Rx** to print the final Rx.

16   Click **Save/Exit** to close the Rx window.

▶   To record and modify the alternate spectacle Rx

1   Click in the **Alternate Spectacle Rx** box in the bottom right of the Vision/Rx ExamWRITER chart window.

The **Rx** window opens.

OR

Click the **Alternate** tab on the **Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add
     measurements to the **Spectacle – Alternate OD**, **OS**, and **OU** text boxes.

     OR

     Type the appropriate measurements in the **Spectacle – Alternate OD**, **OS**,
     and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**,
     No Lens, **Not Recorded**, or **Prosthesis** from the **Underlying
     Conditions** drop-down menu.

4   Select the prescription's usage from the **Usage** drop-down menu.

Note	The usage is copied to the OfficeMate Rx and is printed on the prescription.

5   Select the prescription and expiration dates from the **Prescription Date** and
     Expiration Date drop-down menus.

6   Click the Show Binocular **No** radio button and follow the instructions below to record lens product information and Rx lab order options:

a.   Type a product code into the OD **Product Code** text box or click the **?** to open the Find Product window and search for a product.

a.   Type a product name into the OD **Product Name** text box or click the **?** to open the Find Product window and search for a product.

b.   Select an OD lens category from the **Category** drop-down menu.

c.   Select an OD lens material from the **Material** drop-down menu.

d.   If you want to make the OS lens information the same as the OD information, click the **=** button; otherwise, repeat steps 6a–6c for the OS fields.

e.   Select a lens color from the **Color** drop-down menu.

f.   Select a lens density from the **Density** drop-down menu and select the **Solid** or **Gradient** radio button.

g.   If the lens is uncut, select the **Uncut Lens** check box.

h.   Select add-ons from the **Product Add-Ons** box (hold down the Shift or Ctrl key to select multiple add-ons at the same time) and click the right arrow to move the selected add-ons to the **Add-ons selected** box.

i.   Type special instructions for the lab in the **Special Instructions to Lab** text box.

j.   Type Rx notes in the **Rx Notes** text box. These notes will print on the
      ExamWRITER Rx. An Rx Notes flag is displayed on the ExamWRITER
      chart window, notifying you that there are Rx notes; click this flag to view
      the notes.

Note	Lab order options are transferred to OfficeMate to enhance communication between the doctor and technical staff.

7   Click the Show Binocular **Yes** radio button to display or record binocular
      measurements.

Note	To record binocular measurements, click in a Binocular text box and follow the instructions in Recording Binocular Vision/Rx Information on page 175.

8   Click the **BPD** or **MPD** radio button and then click your cursor in a **Dist** or
      Near text box to open the Pulpillary Distance window and record pulpillary
      distance measurements.

9   If you want to add alternate spectacle prescription impressions and observations
      to the EMR, click **Observations**; otherwise, go to step 12.

      The **ALTERNATE Rx Impressions/Observations** window opens.

10   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

11   Click **Save/Exit**.

Click **Crea**te Lab Order or Update Lab Order to create or update the alternate spectacle lab order; or, go to step 13 to post charges without creating a lab order. An Rx number appears in the **Lab Order** text box.

Click **Post Charges ONLY** to post charges without creating a lab order.

Posting charges only is a great feature to use for noninventory items.

The Rx charges are transferred to an OfficeMate fee slip where they are automatically priced.

Note	In order to view the Post Charges ONLY button and post charges without creating a lob order, you must have selected the **Yes** radio buttons of the OfficeMate Interface options preferences. For more information on these preferences, go to To define and change general preferences on page 43.

12 If you want to create multiple alternate spectacle prescriptions, click **New Rx** and follow the steps above to create additional alternate spectacle prescriptions.

Notes	• Click the arrows under **#/of** to view other alternate spectacle prescriptions.
	• If you are an OfficeMate user, click the arrow buttons in the OfficeMate Eyewear Order window to view the multiple prescriptions.

13 Click **Save/Exit** to close the Rx window.

▶ To view the spectacle history

❖ Click the yellow **Hx** button in the top right of the Vision/Rx ExamWRITER chart window or click the **History** tab on the Rx window. Right-click on a prescription and select a copy option to copy the selected prescription to another prescription.

▶ To record and modify keratometry readings

> | Note | Click the yellow **Hx** button in the K-Readings box in the top right of the Vision/Rx ExamWRITER chart window to view the patient's keratometry readings history in a list and in a graph. For more information on viewing the patient's keratometry readings history, go to To view keratometry reading history on page 145. |
> |---|---|

1   Click in the **K-Readings** box in the top right of the Vision/Rx ExamWRITER chart window.

The **Keratometry** window opens.

2   Click on the blue slider bar to add measurements to the **OD** and **OS** text boxes.

OR

Type the appropriate measurements in the **OD** and **OS** text boxes.

> | Notes | • You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes. |
> |---|---|
> | | • Click **OD-Not Recorded** and **OS-Not Recorded** to document unrecorded keratometry measurements. |

3   If you want to add keratometry impressions and observations to the EMR, click **Observations**; otherwise, go to step 5.

The **KERATOMETRY Impressions/Observations** window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

▶ To view keratometry reading history

1   Click the yellow **Hx** button in the K-Readings box in the top right of the
    Vision/Rx ExamWRITER chart window.

    The **K-Readings History** window opens.

2   Select the **Flat**, **Steep**, or **Both** radio button to change the display of the graph.

3   Click the icons at the top of the window to copy the graph to the clipboard or
    print the graph.
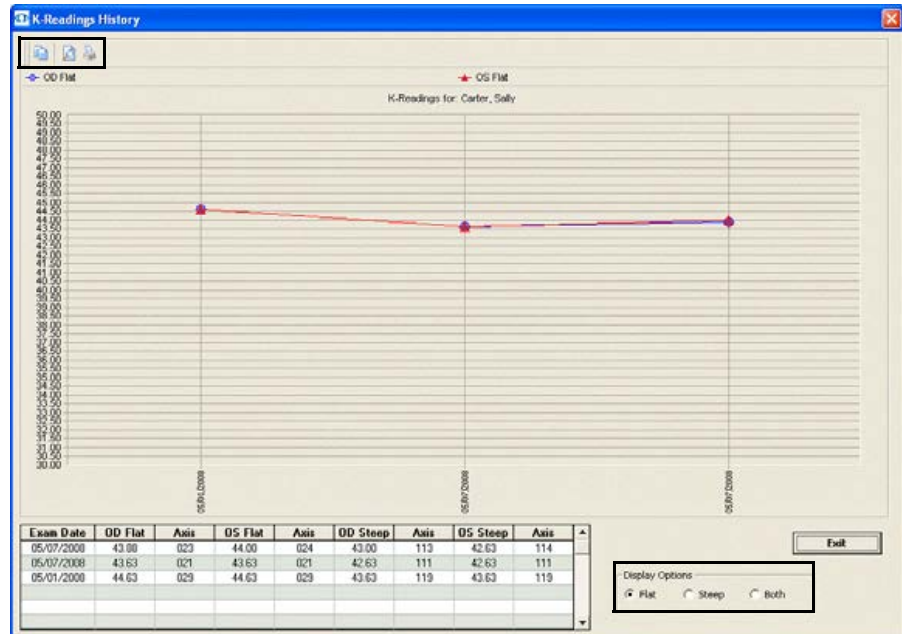
4   Click **Exit** to close the K-Readings History window.

▶   **To record and modify pupillary distance measurements**

1   Click in the **PD** box in the top right of the Vision/Rx ExamWRITER chart window.
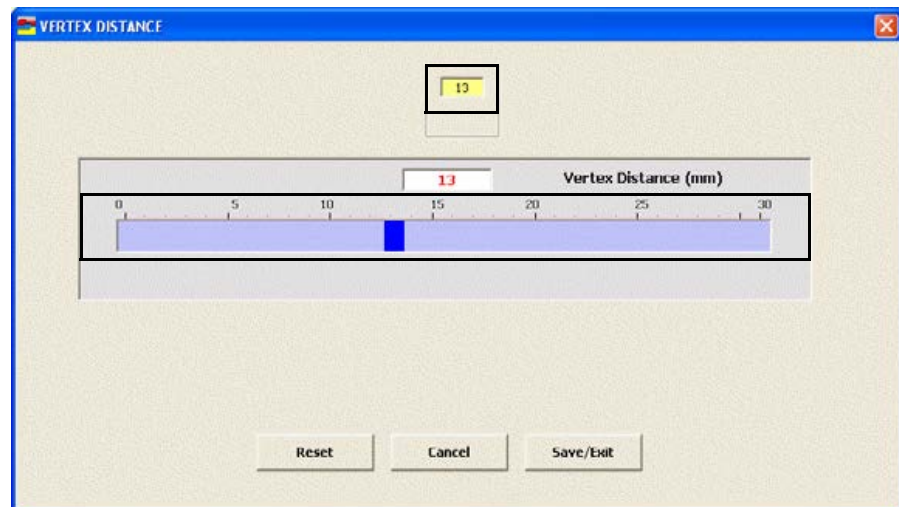
The **Pupillary Distance** window opens.

2   Click on the blue slider bar to add measurements to the **IPD**, **OD,** and **OS** text boxes.

OR

Type the appropriate measurements in the **IPD**, **OD,** and **OS** text boxes.
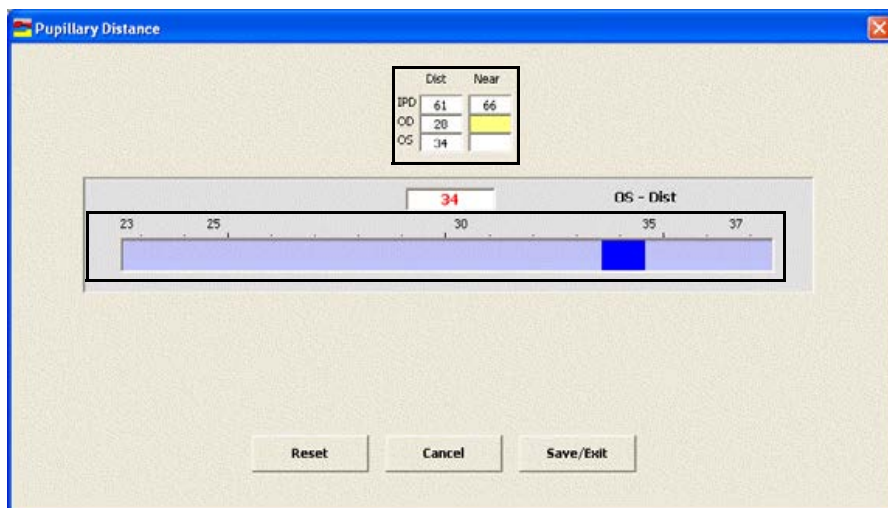
Note	You do not need to click on an IPD, OD, or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the IPD, OD, and OS text boxes.

3   Click **Save/Exit**.

▶   To record and modify a vertex distance measurement

1   Click in the **Vertex Dist** box in the top right of the Vision/Rx ExamWRITER chart window.
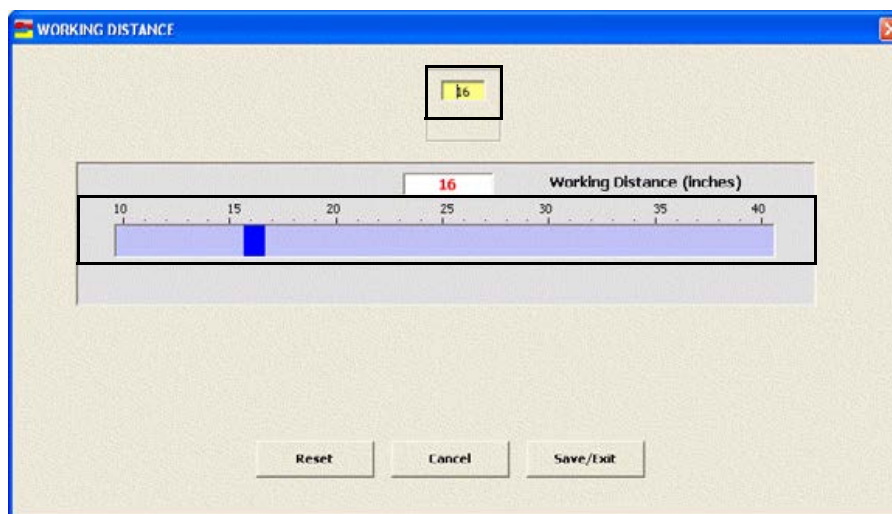
The **VERTEX DISTANCE** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Note	The default vertex distance measurement is 13mm. If you click **Reset**, the default vertex distance measurement will be displayed.

3   Click **Save/Exit**.

▶ **To record and modify a working distance measurement**

1   Click in the **Work Dist** box in the top right of the Vision/Rx ExamWRITER chart window.

The **WORKING DISTANCE** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Note	The default working distance measurement is 16 inches. If you click **Reset**, the default working distance measurement will be displayed.

3   Click **Save/Exit**.

▶ To record and modify a spectacle base curve measurement

1   Click in the **Spec BC** box in the top right of the Vision/Rx ExamWRITER chart window.

     The **SPECTACLE BASE CURVE** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

     OR

     Type the appropriate measurement in the yellow highlighted text box.
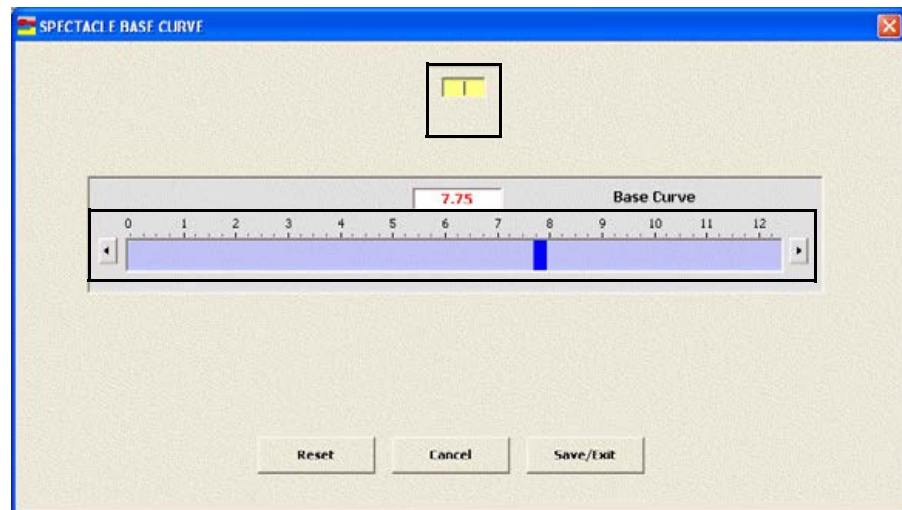
3   Click **Save/Exit**.

Notes	• After you have finished recording Vision/Rx information in an EMR, the **Vision** bar changes in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Recording Contact Lens Vision/Rx Information

This section tells you how to record contact lens vision and prescription information in ExamWRITER, including how

- To record and modify the presenting contact lens Rx, 150
- To record and modify the trial contact lens Rx, 156
- To record and modify the sphere – cylinder contact lens ORx, 163
- To record and modify the sphere contact lens ORx, 165
- To record and modify the final contact lens Rx, 167
- To view the contact lens history, 175

To record and modify Vision/Rx contact lens information in an EMR, click the **Vision/Rx** tab on the ExamWRITER chart window and then click the **Contacts** tab on the Vision bar.

▶   **To record and modify the presenting contact lens Rx**

1   Click in the **Presenting Contact Rx** box in the top left of the Vision/Rx ExamWRITER chart window.

    The **Contact Lens Rx - Presenting** window opens.

    OR

    Click the **Presenting** tab on the **Contact Lens Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add measurements to the **Contact Lens Rx – Presenting OD**, **OS**, and **OU** text boxes.

OR

Type the appropriate measurements in the **Contact Lens – Presenting OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   Click the ellipse (**...**) next to the OD and OS **Product Name** boxes to select contact lens product names.

The **Select Contact Lens** window opens.

Notes	• To view all contact lens products in your ExamWRITER database, select **Show ALL**. To view only the products that you previously designated as the most commonly used products and assigned to your Quick List in the Products window, deselect **Show ALL**. To set up a preference for displaying all contact lenses or only those in your Quick List, go to To define and change default preferences on page 46.
	• To find a specific contact lens product in your ExamWRITER database, type the product name in the **Name Search** text box.
	• To view a specific contact lens category, select the category from the **Lens Category** drop-down menu. You must assign contact lenses to a lens category in order for them to appear in the Select Contact Lens window and be selected for an Rx. To assign contact lenses to a lens category go to Maintaining Product and Service Information on page 56.

4   Select the appropriate product name, click **Search** to search for a specific product with the measurements you recorded (if applicable), and double-click on the appropriate product details line in the bottom part of the window to add the contact lens product name, tint, and lens (if applicable) to the presenting contact lens prescription.

OR

Select the appropriate product name and click **Product Name Only** to add only the product name to the presenting contact lens prescription.

Notes	• If the contact lens product does not have any item details recorded, clicking the **Search** button will yield no results in the bottom part of the window.
	• Click **Clear Rx** to delete the measurements from the Select Contact Lens window and record new measurements or leave the boxes empty.

Notes	• To add or edit a contact lens product, select the appropriate product name and click **Edit Product**. The Products window opens. For more information on adding and editing contact lens products, see Maintaining Product and Service Information on page 56.
	• If you select a rigid, single-vision contact lens from the Select Contact Lens window, you will be able to view and record rigid sphere information. If you select a rigid, multifocal lens from the Select Contact Lens window, you will be able to view and record rigid bifocal information. Appropriate Rx fields are displayed for each lens category that you select.

5   Select OD and OS blends from the **Blend** drop-down menus (rigid lenses only).

6   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the OD and OS **Underlying Conditions** drop-down menus.

7   Select OD and OS tints from the **Tint** drop-down menus (rigid lenses only).

8   Select the **DOT** None, OD, or OS button (rigid lenses only).

9   If you are conducting a monovision contact lens fitting, select the near eye from the **Monovision** drop-down menu.

10   If you want to add presenting contact lens prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 13.

The **PRESENTING CL Rx Impressions/Observations** window opens.

11   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes. • To add custom text, select the appropriate check box and type text in the **Custom text** box. • To clear all items from the Description list, click **Clear ALL Items**. • To delete an item from the Description list, select the item and click **Delete Item**.
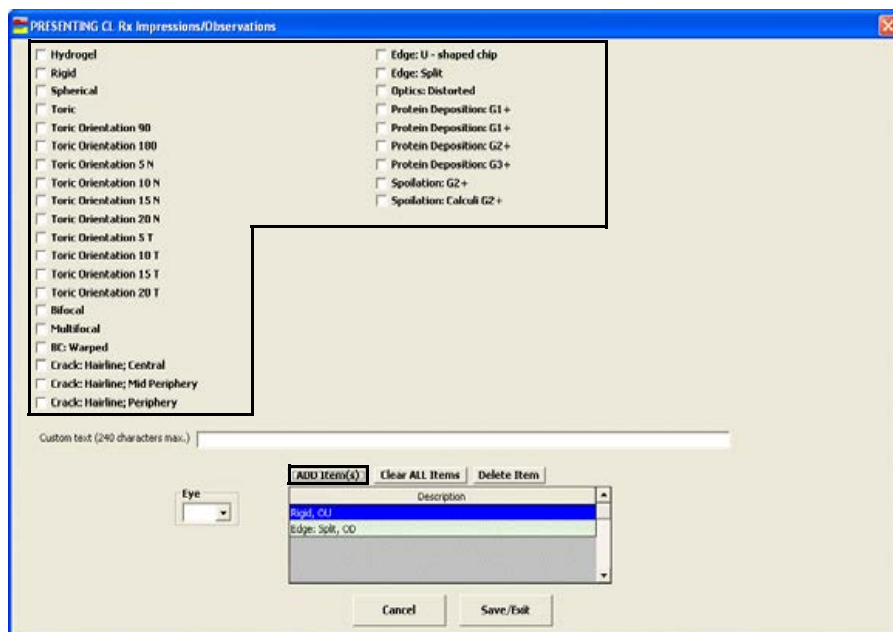
12   Click **Save/Exit**.

13   If you want to copy the presenting prescription to the trial prescription, click **Copy to Trial Rx** and go to To record and modify the trial contact lens Rx on page 156.

14   If you want to copy the presenting prescription to the final prescription, click **Copy to Final Rx** and go to To record and modify the final contact lens Rx on page 167.

15   Click **Save/Exit** to close the Rx window.

▶   **To record and modify the trial contact lens Rx**

1   Click in the **Trial Rx** box in the middle left of the Vision/Rx ExamWRITER chart window.

The **Contact Lens Rx - Trial** window opens.

OR

Click the **Trial** tab on the **Contact Lens Rx** window.

Note	To view or record patient or Rx notes, click **Show Notes** or **Show Rx Notes**. If you record Rx Notes, a flag is displayed on the ExamWRITER chart window notifying you that there are Rx notes; click this flag to view the notes.

2   If you want to copy the most recent final spectacle Rx from a prior exam (if one does not exist in the current exam) that appears at the bottom of the window to the current trial Rx, click **Copy Final Spec to Trial**.

3   Click on the blue slider bar or on the measurement buttons to add measurements to the **Contact Lens Rx - Trial OD**, **OS**, and **OU** text boxes.

OR

Type the appropriate measurements in the **Contact Lens Rx - Trial OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

4   Click the ellipse (**…**) next to the OD and OS **Product Name** boxes to select contact lens product names.

The **Select Contact Lens** window opens.

Notes	• To view all contact lens products in your ExamWRITER database, select **Show ALL**. To view only the products that you previously designated as the most commonly used products and assigned to your Quick List in the Products window, deselect **Show ALL**. To set up a preference for displaying all contact lenses or only those in your Quick List, go to To define and change default preferences on page 46.
	• To find a specific contact lens product in your ExamWRITER database, type the product name in the **Name Search** text box.
	• To view a specific contact lens category, select the category from the **Lens Category** drop-down menu. You must assign contact lenses to a lens category in order for them to appear in the Select Contact Lens window and be selected for an Rx. To assign contact lenses to a lens category go to Maintaining Product and Service Information on page 56.

5   Select the appropriate product name, click **Search** to search for a specific product with the measurements you recorded (if applicable), and double-click on the appropriate product details line in the bottom part of the window to add the contact lens product name, tint, and lens (if applicable) to the trial contact lens prescription.

OR

Select the appropriate product name and click **Product Name Only** to add only the product name to the trial contact lens prescription.

Notes	• If the contact lens product does not have any item details recorded, clicking the **Search** button will yield no results in the bottom part of the window.
	• Click **Clear Rx** to delete the measurements from the Select Contact Lens window and record new measurements or leave the boxes empty.

Notes	• To add or edit a contact lens product, select the appropriate product name and click **Edit Product**. The Products window opens. For more information on adding and editing contact lens products, see Maintaining Product and Service Information on page 56.
	• If you select a rigid, single-vision contact lens from the Select Contact Lens window, you will be able to view and record rigid sphere information. If you select a rigid, multifocal lens from the Select Contact Lens window, you will be able to view and record rigid bifocal information. Appropriate Rx fields are displayed for each lens category that you select.

6   If you want to automatically apply vertex corrections to the trial contact lens Rx, follow the instructions below:

    a.   Record the patient's vertex distance. For more information on recording the vertex distance, go to To record and modify a vertex distance measurement on page 147.

    b.   Click **Apply Vertex Correction** to automatically correct the sphere and cylinder fields if they are at or above +/- 4 diopters.

    c.   Manually round the corrected sphere and cylinder measurements because they are not automatically rounded.

7   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the OD and OS **Underlying Conditions** drop-down menus.

8   Select OD and OS tints from the **Tint** drop-down menus (rigid lenses only).

9   Type an OD and OS quantity in the **Quantity** text box.

10   Select OD and OS blends from the **Blend** drop-down menus (rigid lenses only).

11   Select a lens wear schedule from the **Wear Schedule** drop-down menu.

12   Select a lens replenishment schedule from the **Replenishment** drop-down menu.

13   Select the **DOT** None, OD, or OS button (rigid lenses only).

14   If you are conducting a monovision contact lens fitting, select the near eye from the **Monovision** drop-down menu.

15   Select the prescription and expiration dates from the **Rx Date** and **Expiration Date** drop-down menus.

16   If you want to copy the trial prescription to the final prescription, click **Copy to Final Rx** and go to To record and modify the final contact lens Rx on page 167.

Note	If you copy the trial prescription to the final prescription, it will become the *primary* final prescription.

17   If you want to create multiple trial contact lens prescriptions, click **New Rx** and follow the steps above to create additional trial contact lens prescriptions.

Notes	• Click the arrows under **#/of** to view other trial contact lens prescriptions.
	• If you are an OfficeMate user, click the arrow buttons in the OfficeMate Soft Order or Hard Lens Order window to view the multiple prescriptions.

18   If you want to add trial contact lens prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 20.

The **CONTACT LENS TRIAL Impressions/Observations** window opens.

19   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

20   Click **Save/Exit**.

21   Click **Create Lab Order** or **Update Lab Order** to create or update the final contact lens lab order.

An Rx number appears in the **Soft Lens Rx** or **Rigid Lens Rx** text box.

22   Click **Save/Exit** to close the Rx window.

▶ To record and modify the sphere – cylinder contact lens ORx

1   Click in the **Sph/Cyl ORx** box in the middle left of the Vision/Rx
    ExamWRITER chart window.

    The **Contact Lens Rx – Sphere-Cylinder ORx** window opens.

    OR

    Click the **Sph-Cyl ORx** tab on the **Contact Lens Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add
    measurements to the **Contact Lens Rx – Sphere-Cylinder ORx OD**, **OS**,
    and **OU** text boxes.

    OR

    Type the appropriate measurements in the **Contact Lens Rx –
    Sphere-Cylinder ORx OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**,
    No Lens, **Not Recorded**, or **Prosthesis** from the **Underlying
    Conditions** drop-down menu.

4   If you are conducting a monovision contact lens fitting, select the near eye from the **Monovision** drop-down menu.

5   If you want to add spherical cylinder over refraction contact lens prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 8.

The **SPHERE-CYL OVER REFRACTION Impressions/Observations** window opens.

6   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

7   Click **Save/Exit**.

8   Click **Save/Exit** to close the Rx window.

▶ To record and modify the sphere contact lens ORx

1   Click in the **ORx** box in the middle of the Vision/Rx ExamWRITER chart window.

The **Contact Lens Rx – Sphere ORx** window opens.

OR

Click the **Sph ORx** tab on the **Contact Lens Rx** window.

2   Click on the blue slider bar or on the measurement buttons to add measurements to the **Contact Lens Rx – Sphere ORx OD**, **OS**, and **OU** text boxes.

OR

Type the appropriate measurements in the **Contact Lens Rx – Sphere ORx OD**, **OS**, and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

4   If you are conducting a monovision contact lens fitting, select the near eye from the **Monovision** drop-down menu.

5   If you want to copy the spherical ORx prescription to the trial prescription, click **Copy to Trial Rx** and go to To record and modify the trial contact lens Rx on page 156.

6   If you want to create multiple spherical over refraction contact lens prescriptions, click **New Rx** and follow the steps above to create additional spherical over refraction contact lens prescriptions.

Notes	• Click the arrows under **#/of** to view other spherical over refraction contact lens prescriptions.
	• If you are an OfficeMate user, click the arrow buttons in the OfficeMate Soft Order or Hard Lens Order window to view the multiple prescriptions.

7   If you want to add spherical over refraction contact lens prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 10.

The **SPHERICAL OVER REFRACTION Impressions/Observations** window opens.

8   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

9   Click **Save/Exit**.

10 Click **Save/Exit** to close the Rx window.

▶   **To record and modify the final contact lens Rx**

1   Click in the **Final Contact Rx** box in the bottom left of the Vision/Rx ExamWRITER chart window.

The **Contact Lens Rx - Final** window opens.

OR

Click the **Final** tab on the **Contact Lens Rx** window.

Note	To view or record patient or Rx notes, click **Show Notes** or **Show Rx Notes**. If you record Rx Notes, a flag is displayed on the ExamWRITER chart window notifying you that there are Rx notes; click this flag to view the notes.

2   Click on the blue slider bar or on the measurement buttons to add
       measurements to the **Contact Lens Rx – Final OD**, **OS**, and **OU** text boxes.

       OR

       Type the appropriate measurements in the **Contact Lens Rx – Final OD**, **OS**,
       and **OU** text boxes.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• If you want to make the OD, OS, and OU prescriptions the same measurement, click the **=** button.
	• To clear all visual acuities previously recorded for an Rx, click **Clear VAs**.

3   Click the ellipse (**...**) next to the OD and OS **Product Name** boxes to select contact lens product names.

The **Select Contact Lens** window opens.

Notes	• To view all contact lens products in your ExamWRITER database, select **Show ALL**. To view only the products that you previously designated as the most commonly used products and assigned to your Quick List in the Products window, deselect **Show ALL**. To set up a preference for displaying all contact lenses or only those in your Quick List, go to To define and change default preferences on page 46.
	• To find a specific contact lens product in your ExamWRITER database, type the product name in the **Name Search** text box.
	• To view a specific contact lens category, select the category from the **Lens Category** drop-down menu. You must assign contact lenses to a lens category in order for them to appear in the Select Contact Lens window and be selected for an Rx. To assign contact lenses to a lens category go to Maintaining Product and Service Information on page 56.

4   Select the appropriate product name, click **Search** to search for a specific product with the measurements you recorded (if applicable), and double-click on the appropriate product details line in the bottom part of the window to add the contact lens product name, tint, and lens (if applicable) to the final contact lens prescription.

OR

Select the appropriate product name and click **Product Name Only** to add only the product name to the final contact lens prescription.

Notes	• If the contact lens product does not have any item details recorded, clicking the **Search** button will yield no results in the bottom part of the window.
	• Click **Clear Rx** to delete the measurements from the Select Contact Lens window and record new measurements or leave the boxes empty.

Notes	• To add or edit a contact lens product, select the appropriate product name and click **Edit Product**. The Products window opens. For more information on adding and editing contact lens products, see Maintaining Product and Service Information on page 56.
	• If you select a rigid, single-vision contact lens from the Select Contact Lens window, you will be able to view and record rigid sphere information. If you select a rigid, multifocal lens from the Select Contact Lens window, you will be able to view and record rigid bifocal information. Appropriate Rx fields are displayed for each lens category that you select.

5   If the patient has a nonprescription underlying condition, select **Balance Lens**, **No Lens**, **Not Recorded**, or **Prosthesis** from the **Underlying Conditions** drop-down menu.

6   Select OD and OS tints from the **Tint** drop-down menus (rigid lenses only).

7   Type an OD and OS quantity in the **Quantity** text box.

8   Select the prescription's usage from the **Usage** drop-down menu.

9   Select OD and OS blends from the **Blend** drop-down menus (rigid lenses only).

10   Select a lens wear schedule from the **Wear Schedule** drop-down menu.

11   Select a lens replenishment schedule from the **Replenishment** drop-down menu.

12   Select a disinfecting regimen from the **Disinfecting** drop-down menu.

Note	• The Disinfection information that is recorded on the Contacts (Care Regimen) window will print on the first final Rx. Selections from the Disinfecting drop-down menu on the Contact Lens Rx - Final window will print on the second and any subsequent final prescriptions.
	• Only the disinfecting information that is recorded for the most recently saved final Rx is displayed under the Plan category bar on the Surgery - Plan - Mgmt tab.

13   Select the **DOT** None, OD, or OS button (rigid lenses only).

14   If you are conducting a monovision contact lens fitting, select the near eye from the **Monovision** drop-down menu.

15   Select the prescription and expiration dates from the **Rx Date** and **Expiration Date** drop-down menus.

16   If you want to add final contact lens prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 17.

The **FINAL CL Rx Impressions/Observations** window opens.

17   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

18   Click **Save/Exit**.

19   Click **Create Lab Order** or **Update Lab Order** to create or update the final
      contact lens lab order; or, go to step 20 to post charges without creating a lab
      order.

      An Rx number appears in the **Lab Order** text box.

Click **Post Charges ONLY** to post charges without creating a lab order.

Posting charges only is a great feature to use for noninventory items.

The Rx charges are transferred to an OfficeMate fee slip where they are automatically priced.

Note	In order to view the Post Charges ONLY button and post charges without creating a lob order, you must have selected the **Yes** radio buttons of the OfficeMate Interface options preferences. For more information on these preferences, go to To define and change general preferences on page 43.

20   Click **Print Rx** to print the final Rx.

21   If you want to create multiple final contact lens prescriptions, click **New Rx** and follow the steps above to create additional final contact lens prescriptions.

Notes	• Click the arrows under **#/of** to view other final contact lens prescriptions.
	• If you are an OfficeMate user, click the arrow buttons in the OfficeMate Soft Order or Hard Lens Order window to view the multiple prescriptions.

22   Click **Save/Exit** to close the Rx window.

▶ **To view the contact lens history**

❖ Click the yellow **Hx** button in the top middle of the Vision/Rx ExamWRITER chart window or click the **History** tab on the Contact Lens Rx window. Right-click on a prescription and select a copy option to copy the selected prescription to another prescription.
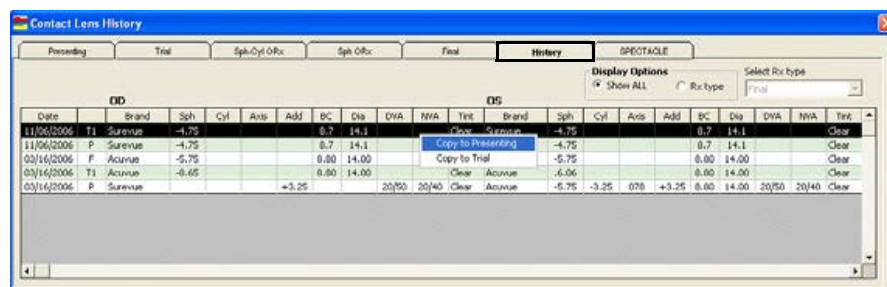
Notes	• After you have finished recording Vision/Rx information in an EMR, the **Vision** bar changes in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Recording Binocular Vision/Rx Information

This section tells you how to record binocular vision and prescription information in ExamWRITER, including how

- To record and modify distance cover test measurements, 176

- To record and modify near cover test measurements, 177

- To record and modify near point convergence measurements, 179

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- To record and modify aniseikonia measurements, 183

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- To record and modify eye dominance, 186

- To record and modify near point accommodation measurements, 188

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- To record and modify phoria near measurements, 191

- To record and modify vergence measurements, 194

- To record and modify an AC/A ratio measurement, 196

- To record and modify relative accommodation measurements, 197

- To record and modify a binocular cross cylinder measurement, 200

To record and modify binocular vision and prescription information in an EMR, click the **Vision/Rx** tab on the ExamWRITER chart window and then click the **Binocular** tab on the Vision bar.

▶ ## To record and modify distance cover test measurements

1   Click in the **Cover Test - Distance** box in the top left of the Vision/Rx ExamWRITER chart window.

     The **COVER TEST – DISTANCE** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Select the appropriate **ESO**, **Ortho**, **EXO**, **Base Up**, or **Base Dn** radio button.

4   Select the appropriate **Phoria** or **Tropia** radio button.

5   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

     OR

     Type the appropriate measurement in the yellow highlighted text box.

| Notes	• You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric cover test distance information.

6   If you want to add distance cover test binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 8.

     The **COVER TEST DISTANCE Impressions/Observations** window opens.

7   Select an appropriate etiology from the **Etiology** drop-down menu, then select the appropriate check boxes, and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

8   Click **Save/Exit**.

▶   **To record and modify near cover test measurements**

1   Click in the **Cover Test - Near** box in the top left of the Vision/Rx ExamWRITER chart window.

The **COVER TEST – NEAR** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Select the appropriate **ESO**, **Ortho**, **EXO**, **Base Up**, or **Base Dn** radio button.

4   Select the appropriate **Phoria** or **Tropia** radio button.

5   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

| Notes	• You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric cover test near information.

6   If you want to add near cover test binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 8.

The **COVER TEST (NEAR) Impressions/Observations** window opens.

7   Select an appropriate etiology from the **Etiology** drop-down menu, then select the appropriate check boxes, and click **ADD Item(s)**.

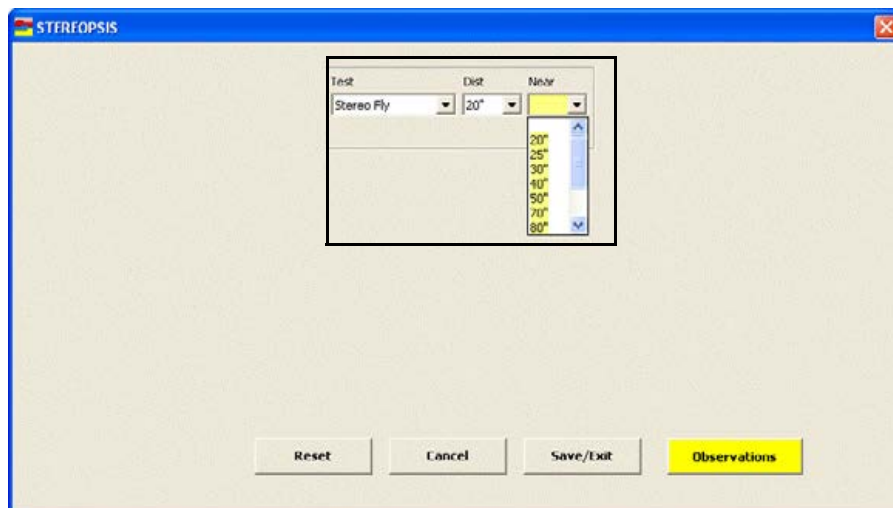| Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

8   Click **Save/Exit**.

▶ **To record and modify near point convergence measurements**

1   Click in the **NPC** box in the top left of the Vision/Rx ExamWRITER chart window.

The **NEAR POINT CONVERGENCE** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Notes	• You do not need to click on a Blur, Break, or Recovery text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the Blur, Break, and Recovery text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric near point convergence information.

4   If you want to add near point convergence binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 6.

The **NEAR POINT CONVERGENCE Impressions/Observations** window opens.

5   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.
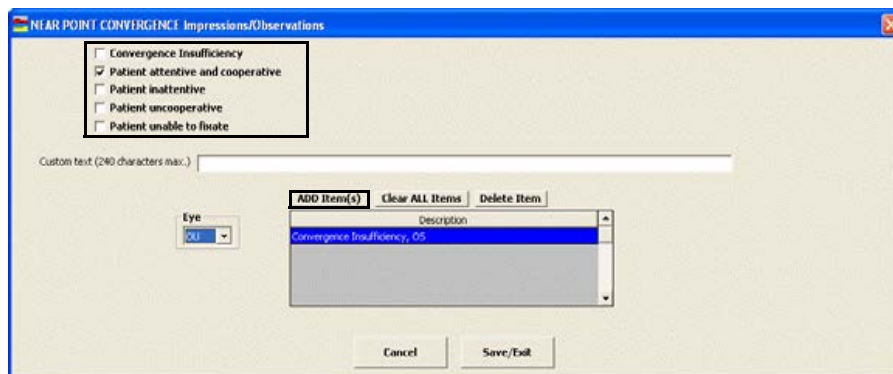
6   Click **Save/Exit**.

▶   To record and modify fusion measurements

1   Click in the **Fusion** box in the top left of the Vision/Rx ExamWRITER chart window.

The **FUSION** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Select the distance measurement from the **Dist** drop-down menu.

4   Select the near measurement from the **Near** drop-down menu.

5   Select an impression from the **Impression** drop-down menu.

6   If you want to add fusion binocular prescription impressions and observations
    to the EMR, click **Observations**; otherwise, go to step 8.

    The **FUSION Impressions/Observations** window opens.

7   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

8   Click **Save/Exit**.

▶ To record and modify aniseikonia measurements

1 Click in the **Aniseikonia** box in the top middle of the Vision/Rx ExamWRITER chart window.

The **ANISEIKONIA** window opens.

2 Select the appropriate vertical and horizontal distance and near measurements from the drop-down menus.
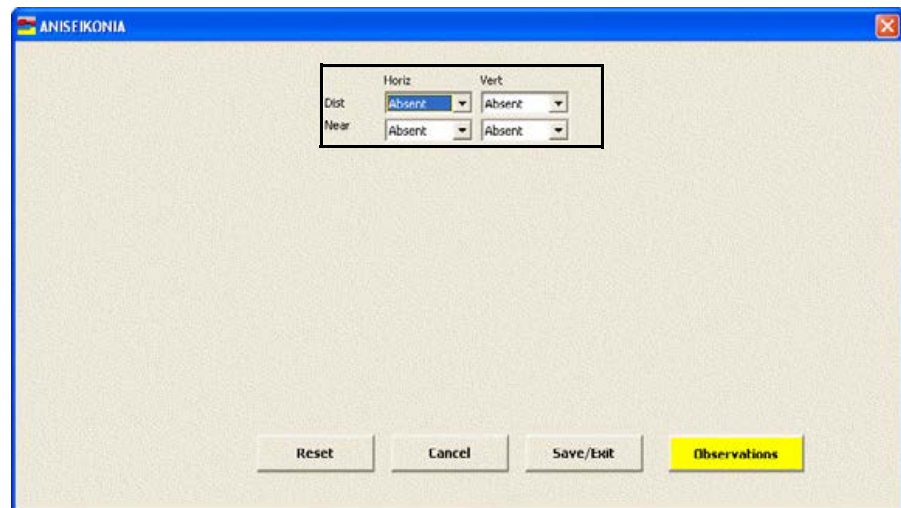
3 If you want to add aniseikonia binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 5.

The **ANISEIKONIA Impressions/Observations** window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.
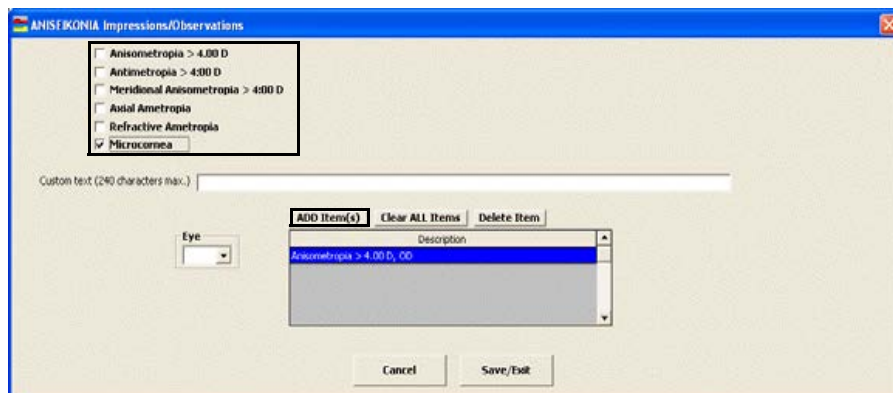
5   Click **Save/Exit**.

▶   To record and modify stereopsis measurements

1   Click in the **Stereopsis** box in the top middle of the Vision/Rx ExamWRITER chart window.

      The **STEREOPSIS** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Select the distance measurement from the **Dist** drop-down menu.

4   Select the near measurement from the **Near** drop-down menu.

5   If you want to add stereopsis binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 7.

The **STEREOPSIS Impressions/Observations** window opens.

6   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

7   Click **Save/Exit**.

▶ **To record and modify eye dominance**

1   Click in the **Dominance** box in the top middle of the Vision/Rx
     ExamWRITER chart window.

     The **DOMINANCE** window opens.

2   Select the appropriate eye dominance from the **Eye Dominance** drop-down
     menu.
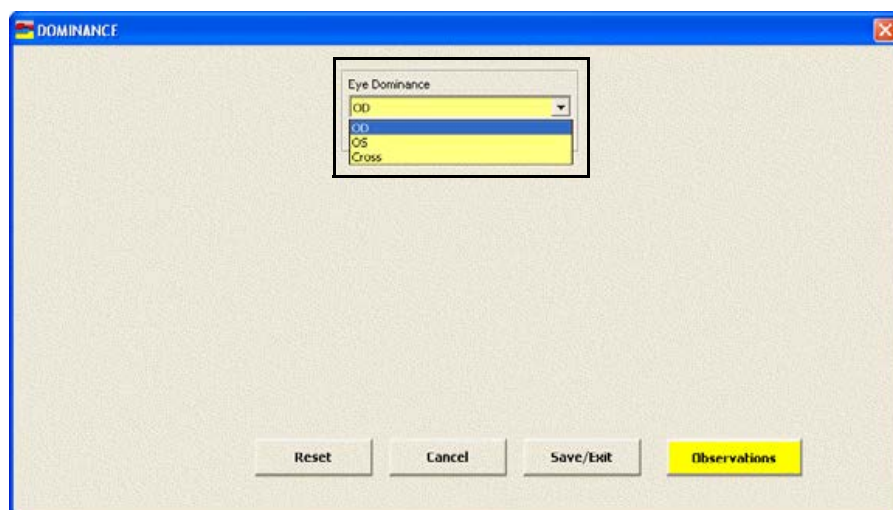
3   If you want to add eye dominance binocular prescription impressions and
     observations to the EMR, click **Observations**; otherwise, go to step 5.

     The **OCULAR DOMINANCE Impressions/Observations** window
     opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

▶ To record and modify near point accommodation measurements

1   Click in the **NPA** box in the top middle of the Vision/Rx ExamWRITER chart
    window.

    The **NEAR POINT ACCOMMODATION** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text
    box.

    OR

    Type the appropriate measurement in the yellow highlighted text box.

Notes	• You do not need to click on an OD, OS, or OU text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD, OS, and OU text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric near point accommodation information.

3   If you want to add near point accommodation binocular prescription
    impressions and observations to the EMR, click **Observations**; otherwise, go
    to step 5.

    The **NEAR POINT ACCOMMODATION**
    Impressions/Observations window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

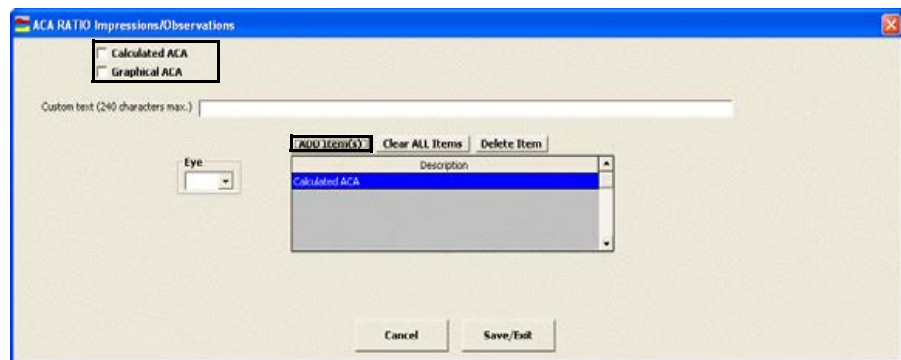▶   To record and modify phoria distance measurements

1   Click in the **Phoria - Distance** box in the top middle of the Vision/Rx ExamWRITER chart window.

The **PHORIA - DISTANCE** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Select the appropriate **ESO**, **Ortho**, **EXO**, **Base Up**, or **Base Dn** radio button.

4　Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Note	• You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes. • Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric phoria distance information.

5　If you want to add phoria distance binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 7.

The **PHORIA DISTANCE Impressions/Observations** window opens.

6   Select an appropriate etiology from the **Etiology** drop-down menu, then select
     the appropriate check boxes, and click **ADD Item(s)**.

Note	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

7   Click **Save/Exit**.

▶   ## To record and modify phoria near measurements

1   Click in the **Phoria - Near** box in the top middle of the Vision/Rx
     ExamWRITER chart window.

     The **PHORIA - NEAR** window opens.

2   Select the appropriate test from the **Test** drop-down menu.

3   Select the appropriate **ESO**, **Ortho**, **EXO**, **Base Up**, or **Base Dn** radio
     button.

4   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Notes	• You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric phoria near information.

5   If you want to add phoria near binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 7.

The **PHORIA NEAR Impressions/Observations** window opens.

6 Select an appropriate etiology from the **Etiology** drop-down menu, then select the appropriate check boxes, and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

7 Click **Save/Exit**.

▶ To record and modify vergence measurements

1   Click in the **Vergence** box in the top right of the Vision/Rx ExamWRITER chart window.

The **VERGENCE** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Notes	• You do not need to click on a BI (Divergence) or BO (Convergence) text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the BI (Divergence) and BO (Convergence) text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric vergence information.

3   If you want to add vergence binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 5.

The **VERGENCE Impressions/Observations** window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

▶ To record and modify an AC/A ratio measurement

1   Click in the **AC/A Ratio** box in the top right of the Vision/Rx ExamWRITER chart window.

The **AC/A RATIO** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.
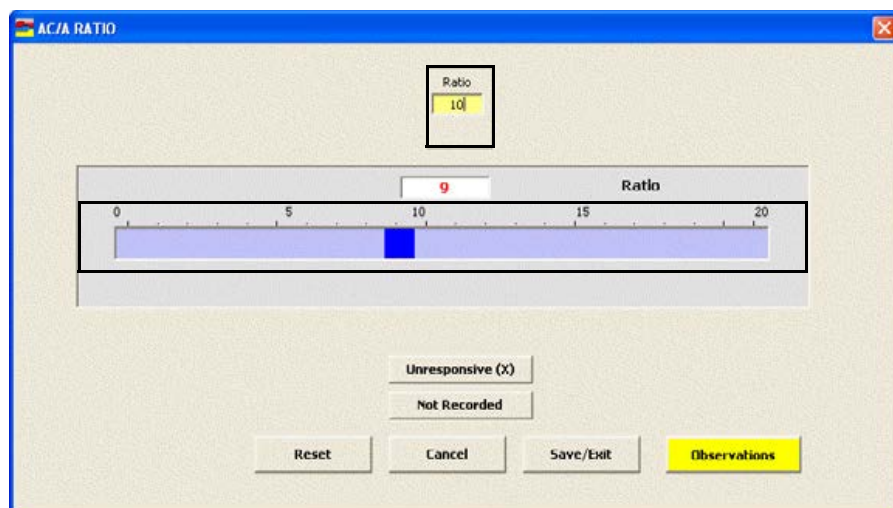
Note	Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric AC/A ratio information.

3   If you want to add AC/A ratio binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 5.

The **ACA RATIO Impressions/Observations** window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

▶   To record and modify relative accommodation measurements

1   Click in the **NRA/PRA** box in the top right of the Vision/Rx ExamWRITER chart window.

The **RELATIVE ACCOMMODATION** window opens.

2   Select the appropriate **(-) Minus**, **Plano**, or **(+) Plus** radio button.

3   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Notes	• You do not need to click on an NRA or PRA text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the NRA and PRA text boxes.
	• Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric relative accommodation information.

4   If you want to add relative accommodation binocular prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 6.

The **NEGATIVE RELATIVE ACCOM Impressions/Observations** window opens.

5   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

6   Click **Save/Exit**.

▶   To record and modify a binocular cross cylinder measurement

1   Click in the **BXC/14B** box in the top right of the Vision/Rx ExamWRITER chart window.

The **BINOCULAR CROSS CYLINDER** window opens.

2   Select the appropriate **(-) Minus** or **(+) Plus** radio button.

3   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.
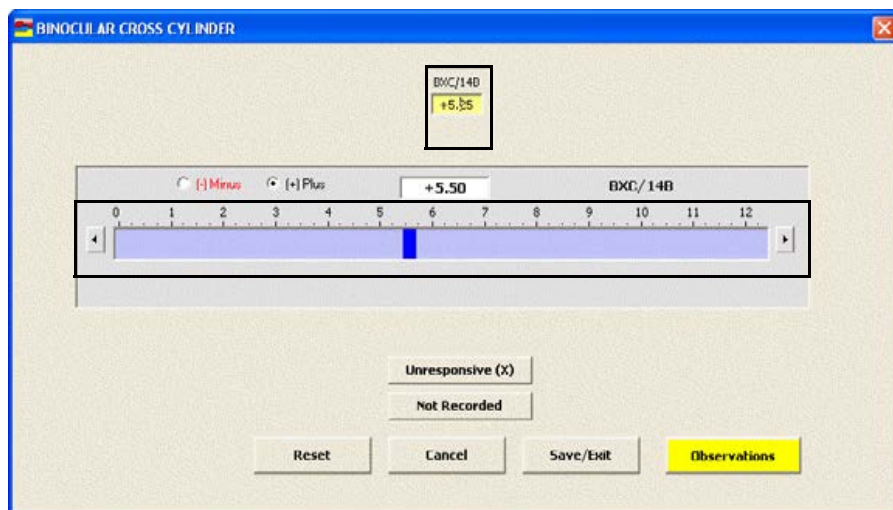
Note	Click **Unresponsive (X)** and **Not Recorded** to record nonnumeric binocular cross cylinder information.

4   If you want to add binocular cross cylinder prescription impressions and observations to the EMR, click **Observations**; otherwise, go to step 6.

The **BXC Impressions/Observations** window opens.

5   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

6   Click **Save/Exit**.

Notes	• After you have finished recording Vision/Rx information in an EMR, the **Vision** bar changes in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Recording Examination & Special Testing Information

This section tells you how to record examination and special testing information in ExamWRITER, including how

To record and modify Examination and Special Testing information in an EMR, click the **Exam - Special Tests** tab on the ExamWRITER chart window.

For more information on recording examination and special testing information, see the OSSU 602 "Navigating in ExamWRITER" iTrain and the OSSU 600-2 "Documenting the Exam" training course.

▶ To record and modify tonometry measurements

Notes	• You can record up to ten tonometry measurements in each EMR.
	• Click the yellow **Hx** button in the IOP grid on the ExamWRITER chart window to view the patient's IOP history in a list and in a graph.

1   Click on a blank line in the **IOP** grid in the top left of the Examination ExamWRITER chart window to add a new measurement.

OR

Click on an existing line in the **IOP** grid in the top left of the Examination ExamWRITER chart window to modify or delete a measurement.

The **Tonometry** window opens.

2   Click **Goldmann**, **Applanation**, **Non-Contact**, **Indentation**, or **TonoPen**, or **Digital** to add the appropriate test to the **Test** text box.

eyefinity/OfficeMate

3   Click on the blue slider bar to add a measurement to the yellow highlighted text box or modify a measurement in the yellow highlighted box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Notes	• You do not need to click on the OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.
	• Click **OD – Not Recorded** and **OS – Not Recorded** to record nonnumeric tonometry information.
	• If you want to delete the measurement, type 0 in the **OD** and **OS** text boxes and click **Save/Exit**; otherwise, go to step 4.

4   If you want to adjust the time, type numbers in the **Time** text box; otherwise, the current time will be recorded.

5   Select an appropriate tonometry category from the **Category** drop-down menu.

Note	If you select **Examination** from the Category drop-down menu, you can view highlighted OD and OS measurements that were used to compute the adjusted IOP in the IOP grid. You can also view the adjusted IOP in the Adjusted IOP boxes in the Pachymetry box if pachymetry measurements are recorded. To record pachymetry measurements, go to To record and modify pachymetry measurements on page 206.

6 If you want to add tonometry impressions and observations to the EMR, click **Observations**; otherwise, go to step 8.

The **INTRA OCULAR TENSIONS Impressions/Observations** window opens.

7 Select the appropriate check boxes and click **ADD Item(s)**.

Notes	
	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

8 Click **Save/Exit** to close the INTRA OCULAR TENSIONS Impressions/Observations window.

9 Click **Save/Exit** to close the Tonometry window.

▶   To view tonometry measurement history

Note	You can only view graphical tonometry measurement histories for Examination tests. You cannot view graphical tonometry measurement histories for Pre-Test and Post-Dilation tests.

1   Click the yellow **Hx** button in the IOP box in the top right of the Exam - Special Tests ExamWRITER chart window.

The **IOP History** window opens.

2   Select the **OD**, **OS**, or **OU** radio button to change the display of the graph.

3   Click the icons at the top of the window to copy the graph to the clipboard or print the graph.
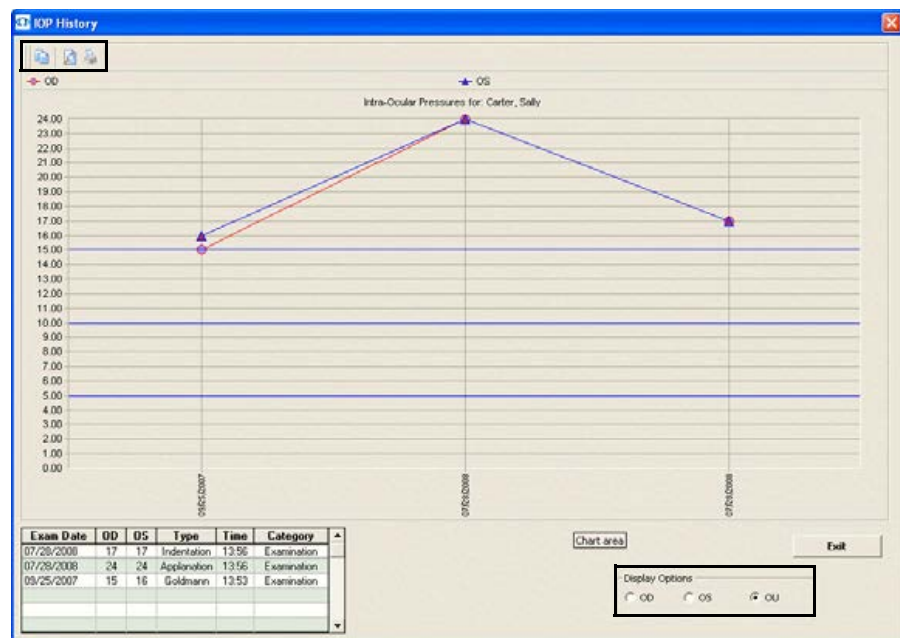
4   Click **Exit** to close the IOP History window.

▶ To record and modify pachymetry measurements

Notes	• Click the yellow **Hx** button in the Pachymetry box on the ExamWRITER chart window to view the patient's pachymetry history in a list and in a graph. For more information on viewing the patient's pachymetry history, go to To view pachymetry measurement history on page 207.
	• If you selected **Examination** from the Tonometry Category drop-down menu and you record pachymetry measurements, you can view the adjusted IOP in the Adjusted IOP boxes in the Pachymetry box. To record tonometry measurements, go to To record and modify tonometry measurements on page 202.

1 Click in the **Pachymetry** box in the top middle of the Examination ExamWRITER chart window.

The **PACHYMETRY** window opens.

2 Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.
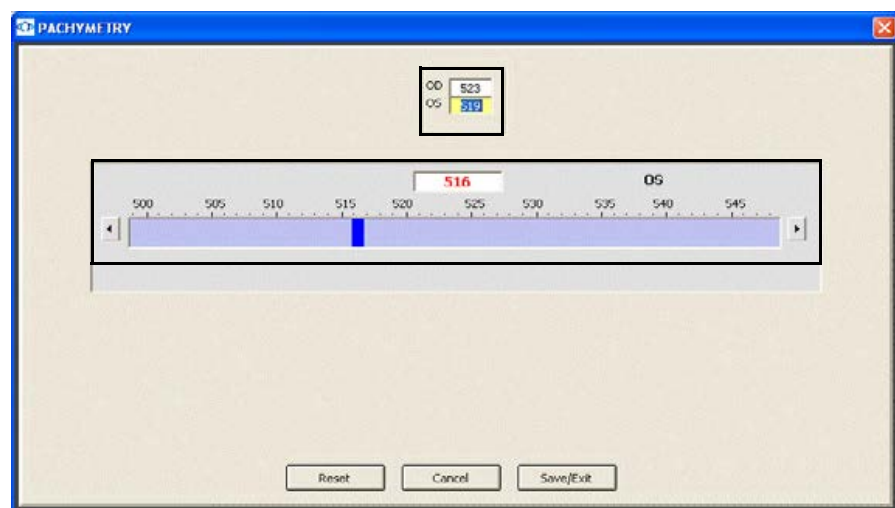
Note	You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.

3 If you want to add pachymetry impressions and observations to the EMR, click the **Exam - Special Tests** tab, click the **Special Testing** category bar, select **Pachymetry**, select appropriate check boxes, and click **Process**. For more information on recording pachymetry impressions, go to To record special testing information on page 218.

4   Click **Save/Exit**.

▶   ## To view pachymetry measurement history

1   Click the yellow **Hx** button in the Pachymetry box in the top middle of the
Exam - Special Tests ExamWRITER chart window.

The **Pachymetry History** window opens.

2   Select the **OD**, **OS**, or **OU** radio button to change the display of the graph.

3   Click the icons at the top of the window to copy the graph to the clipboard or
print the graph.
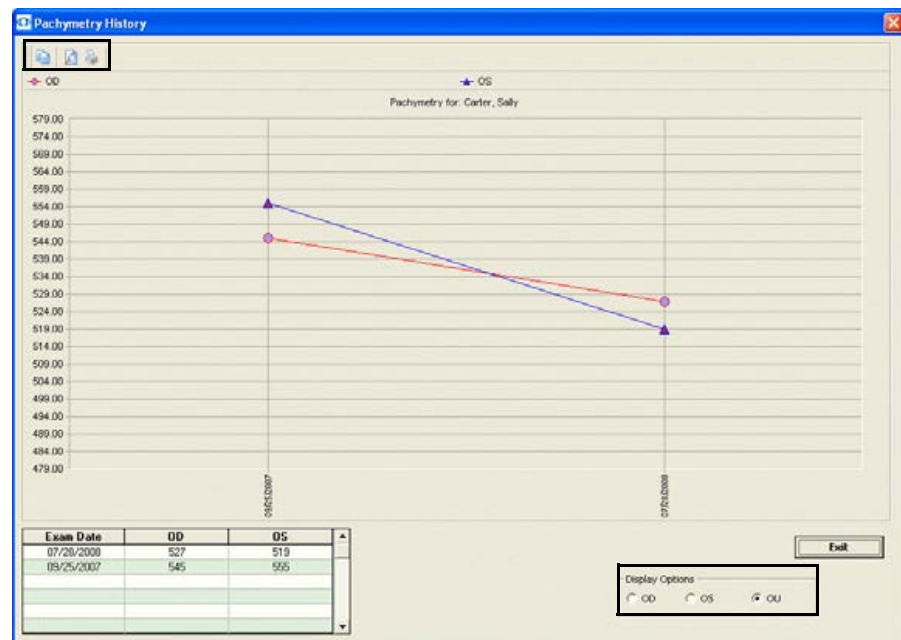
4   Click **Exit** to close the Pachymetry History window.

▶   To record and modify cup disc ratio measurements

Note	Click the yellow **Hx** button in the CD Radio box on the ExamWRITER chart window to view the patient's CD ratio history in a list and in a graph.

1   Click in the **CD Ratio** box in the top middle of the Examination ExamWRITER chart window.

     The **CUP DISC RATIO** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

     OR

     Type the appropriate measurement in the yellow highlighted text box.
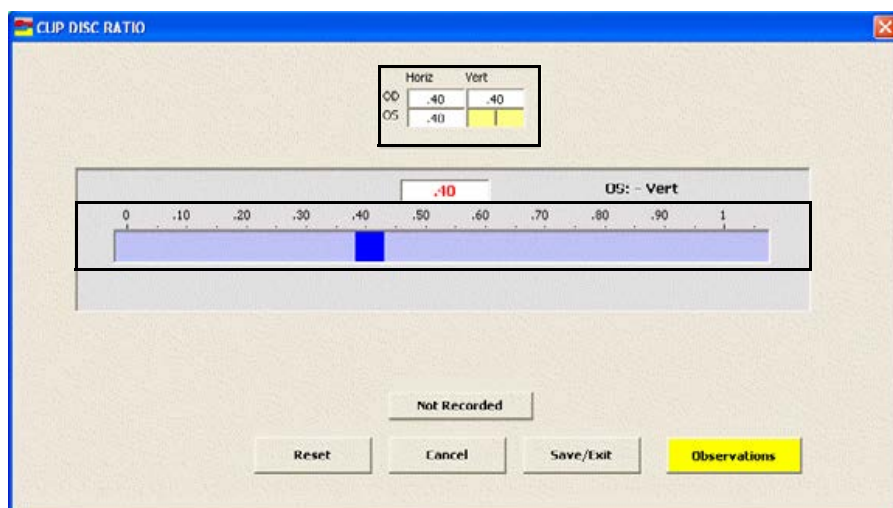
Note	You do not need to click on an OD or OS text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the OD and OS text boxes.

3   If you want to add cup disc ratio impressions and observations to the EMR, click **Observations**; otherwise, go to step 5.

     The **C/D RATIO Impressions/Observations** window opens.

4   Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5   Click **Save/Exit**.

▶ To view cup disc ratio measurement history

1   Click the yellow **Hx** button in the CD Ratio box in the top middle of the Exam - Special Tests ExamWRITER chart window.

The **CD Ratio History** window opens.

2   Select the **OD**, **OS**, or **OU** radio button to change the display of the graph.

3   Click the icons at the top of the window to copy the graph to the clipboard or print the graph.
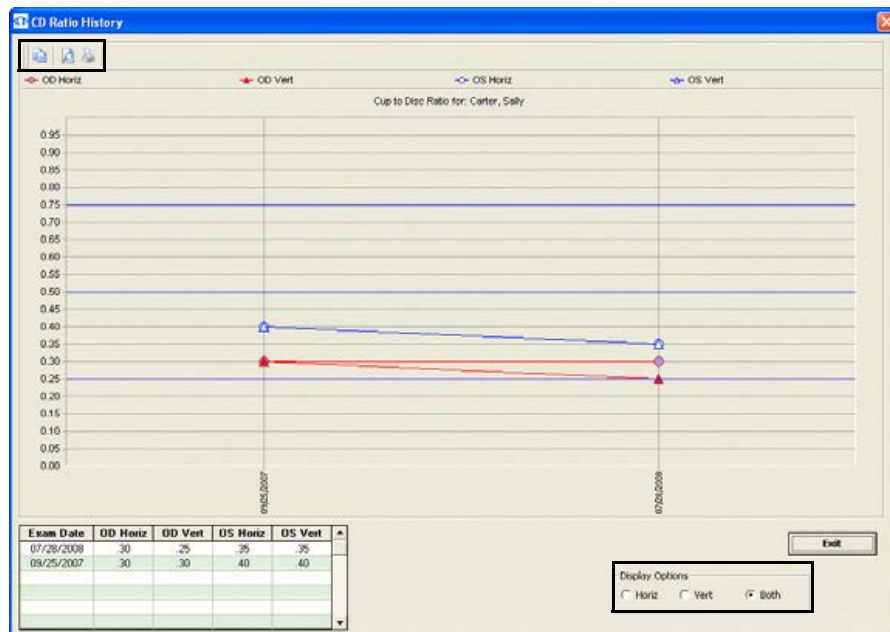
4   Click **Exit** to close the CD Ratio History window.

▶   To record and modify blood pressure and pulse measurements

Note	Click the yellow **Hx** button in the BP Pulse box on the ExamWRITER chart window to view the patient's blood pressure and pulse history in a list and in a graph.

1   Click in the **BP Pulse** box in the top middle of the Examination ExamWRITER chart window.

The **Blood Pressure/Pulse** window opens.

2   Click on the blue slider bar to add a measurement to the yellow highlighted text box.

OR

Type the appropriate measurement in the yellow highlighted text box.

Note	You do not need to click on the Systolic, Diastolic, or Pulse text box and then click on the blue slider bar each time that you add measurements to the text boxes. Simply click on the blue slider bar, and your cursor automatically tabs through the yellow highlighted text boxes in the normal prescription writing process and adds measurements to the Systolic, Diastolic, and Pulse text boxes.

3   If you want to add blood pressure and pulse impressions and observations to the EMR, click **Observations**; otherwise, go to step 5.

The **BP/PULSE Impressions/Observations** window opens.

4　Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To modify the time, type numbers in the **Time** text box.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

5　Click **Save/Exit**.

▶ ## To view blood pressure and pulse measurement history

1   Click the yellow **Hx** button in the BP Pulse box in the top middle of the Exam - Special Tests ExamWRITER chart window.

     The **BP/Pulse History** window opens.

2   Select the **OD**, **OS**, or **OU** radio button to change the display of the graph.

3   Click the icons at the top of the window to copy the graph to the clipboard or print the graph.
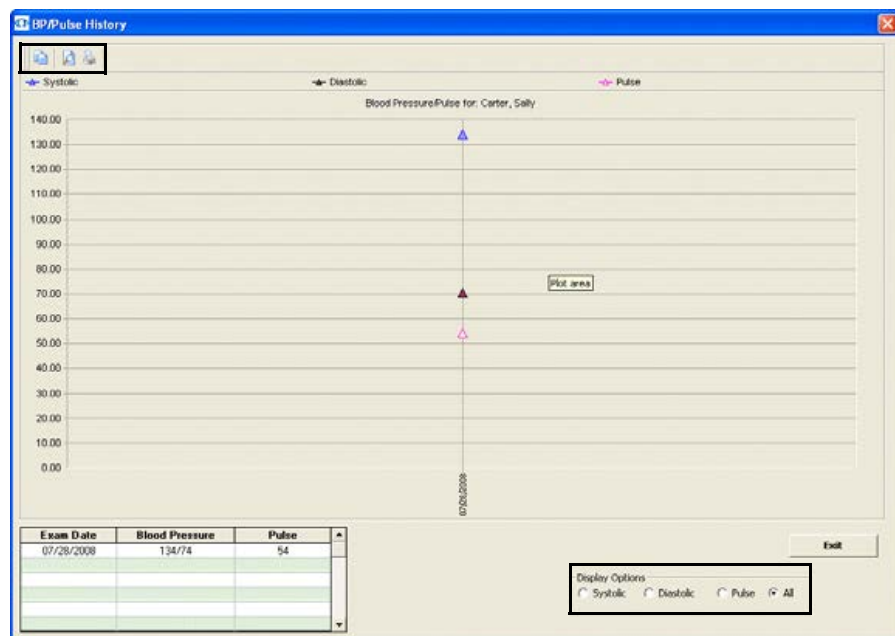
4   Click **Exit** to close the PBP/Pulse History window.

▶ ## To record retinal image information

❖   Click **Retinal Image** in the top middle of the Examination ExamWRITER chart window to automatically record the location of the retinal image that you defined in your default preferences.

     For information on modifying your default retinal image text, go to To define and change default preferences on page 46. For information on attaching a retinal image to the EMR as an eDocument, go to Attaching Electronic Documents to Patient Records on page 241.

▶ To record and modify dilation orders

1 Click **Auto** in the top middle of the Examination ExamWRITER chart window to automatically record the dilation orders that you defined in your default preferences. If you want to modify the dilation orders, go to step 2.

2 Click **Dilation** in the top middle of the Examination ExamWRITER chart window.

The **DILATION ORDERS** window opens.

3 Select the appropriate check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To modify the time, type numbers in the **Time** text box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

4 Click **Save/Exit**.

▶ To record and modify confrontation fields

1   If you detect a scotoma in a patient's eye, click the **OD** and **OS** boxes in the green grid below the Confrontations button in the top right of the Examination ExamWRITER chart window to document where the scotoma appears in the patient's visual field.

2   Click **Confrontations** in the top right of the Examination ExamWRITER chart window.

   The **CONFRONTATION FIELDS Impressions/Observations** window opens.

3   Select **Fields were found to be full in all quadrants** or any other check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

4   Click **Save/Exit**.

▶ **To record and modify amsler studies**

1   If you detect a scotoma in a patient's eye, click the **OD** and **OS** boxes in the green grid below the Amsler Studies button in the top right of the Examination ExamWRITER chart window to document where the scotoma appears in the patient's visual field.

2   Click **Amsler Studies** in the top right of the Examination ExamWRITER chart window.

The **AMSLER STUDIES Impressions/Observations** window opens.

3   Select **Amsler: Negative** or any other check boxes and click **ADD Item(s)**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

4   Click **Save/Exit**.

▶ To record examination information

1   Click the **Examination** bar on the Exam - Special Tests tab in the
     ExamWRITER chart window.

     The **Examination** window opens.

2   Select the appropriate **External Exam OK**, **Anterior Segment OK**, and
     Routine Ophthalmoscopy OK check boxes and any appropriate **Ocular
     Conditions** and **Except** check boxes.

Notes	• Select the **Except** check box(es) only if there are exceptions to the patient's healthy examination; otherwise, only select the **ALL OK** check boxes.
	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

3   Click **Process** or right-click anywhere in the Examination window.

     Depending on the boxes that you checked, various windows will open with
     additional check boxes.

4   Select or deselect the appropriate check boxes and click **Process**.

Notes	• To record selected information for the right, left, or both eyes, first click **OD**, **OS**, or **OU** and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.
	• If a **Current Information** window opens, choose the appropriate button at the bottom of the window to add, edit, save, redo, or delete the previously entered text.

▶ To record special testing information

1   Click the **Special Testing** bar on the Exam - Special Tests tab in the ExamWRITER chart window.

The **Special Testing** window opens.

2   Select the appropriate **Ophthalmic Tests**, **Other Tests**, and **Lab Tests** check boxes.
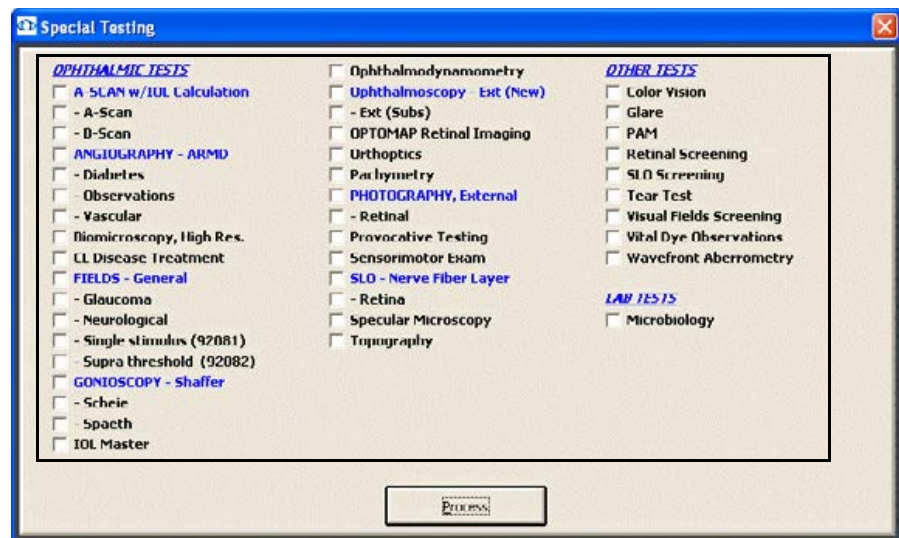
Notes	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

3   Click **Process** or right-click anywhere in the Special Testing window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

4   Select or deselect the appropriate check boxes and click **Process**.

Notes	• To record selected information for the right, left, or both eyes, first click **OD**, **OS**, or **OU** and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.
	• If a **Current Information** window opens, choose the appropriate button at the bottom of the window to add, edit, save, redo, or delete the previously entered text.

▶ To modify examination and special testing information

1   Click the **Examination** and **Special Testing** bars and follow the instructions
     above for recording information in an EMR.

     OR

     Click on a bold subheading in the ExamWRITER chart window.

     The **Current Information** window opens.

2   Choose the appropriate button at the bottom of the window to add, edit, save,
     redo, or delete the previously entered text.
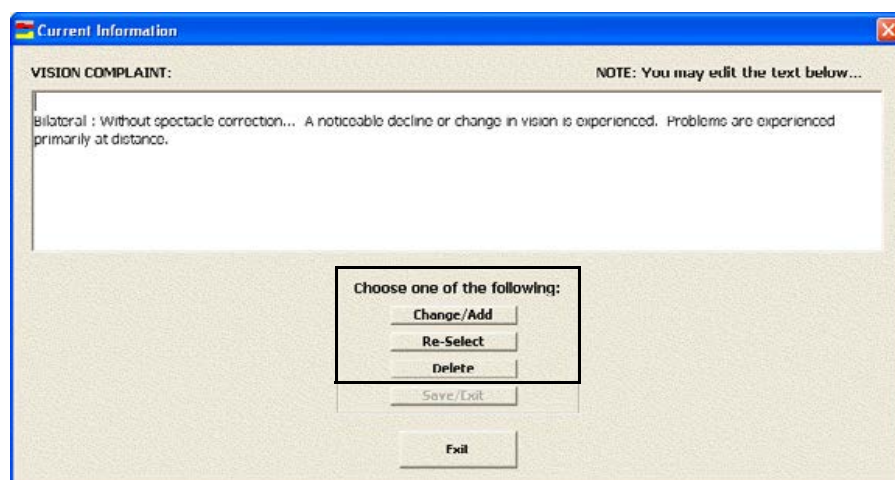
Notes	• After you have finished recording Examination information in an EMR, the **Examination** and **Special Testing** bars change in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Recording Surgery, Plan, & Management Information

This section tells you how to record surgery, plan, and management information in
ExamWRITER, including how

For more information on recording surgery, plan, and management information, see the OSSU 602 "Navigating in ExamWRITER" iTrain and the OSSU 600-2 "Documenting the Exam" training course.

▶ To record surgery information

1 Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2 Click the **Surgery** bar.

The **Surgery** window opens.

3 Select the appropriate **Operative Reports** check boxes.
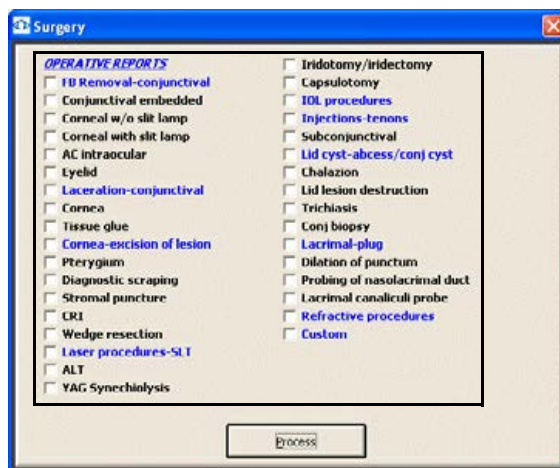
Notes	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4 Click **Process** or right-click anywhere in the Surgery window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

5 Select the appropriate check boxes and click **Process**.

Notes	• To record selected information for the right, left, or both eyes, first click **OD**, **OS**, or **OU** and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.

▶ **To record impressions and assessments**

1   Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2   Click the **Impressions/Assessment** bar.

The **Impressions/Assessment** window opens.

3   Select the appropriate **External Exam**, **Vision Impressions**, **Anterior Segment**, **Routine Ophthalmoscopy**, and **Ocular Conditions** check boxes.

Notes	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4   Click **Process** or right-click anywhere in the Impressions/Assessment window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

5   Select the appropriate check boxes and click **Process**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, select the appropriate check box and type text in the **Custom text** box.
	• To clear all items from the Description list, click **Clear ALL Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.

6   Click **Save/Exit**.

▶   To record plan information

1   Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2   Click the **Plan** bar.

    The **Plan** window opens.

3   Select the appropriate **External Exam**, **Vision Impressions**, **Anterior Segment**, **Prescription Pad**, **Routine Ophthalmoscopy**, and **Ocular Conditions** check boxes.

Notes	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.
	• To write medication prescriptions, go to To write medication prescriptions on page 223.
	• To record contact lens care regimes, go to To record contact lens care regimes on page 225.
	• To print prescriptions, go to To record patient management information on page 228.

4   Click **Process** or right-click anywhere in the Plan window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

5   Select the appropriate check boxes and click **Process**.

Notes	• To record selected information for the right, left, or both eyes, first select **OD**, **OS**, or **OU** from the **Eye** drop-down menu and then select the appropriate check box(es) for the right, left, or both eyes.
	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.

▶   To write medication prescriptions

For more information on writing Rx prescriptions, see the OSSU 602 "Navigating in ExamWRITER" iTrain and the OSSU 600-2 "Documenting the Exam" training course.

Note	Press the **F6** key anytime during an exam to open the Medication Order window and record a patient's prescription medication.

1   Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2   Click the **Plan** bar.

The **Plan** window opens.

3   Select the **Medication Rx** check box and click **Process**.

4   Enter text in the text boxes in the Medication Order window and select options from the drop-down menus.

Notes	• If the patient's medical history has been entered into the EMR, it appears in the **Medication Hx** grid at the bottom of the window.
	• The expiration date automatically populates to one year from the date of the order for all refill medication orders. You can only record a medication's expiration date in ExamWRITER 8.0 exams and higher. You cannot record a medication's expiration date when you refill a medication order that was recorded in an exam created with ExamWRITER 7.4.1 or below.

5   To taper a medication frequency, follow the instructions below and then go to step 7; otherwise, go to step 6.

   a.   Select the highest frequency from the **Frequency** drop-down menu and click **Save Sig**.

   b.   Select the second highest frequency from the **Frequency** drop-down menu and click **Save Sig**.

   c.   Select and save frequencies until you have entered all medication frequencies.

6   Click **Save Sig**.

7   Click **Save Med. Order** to add the medical prescription to the **Current Therapeutic Rx** table.

8   Click **Print w/Sig/Exit** to print the medical prescription with a provider's signature and exit the **Medication Order** window.

OR

Click **Print no Sig/Exit** to print the medical prescription without a provider's signature and exit the **Medication Order** window.

Notes	• For more information on printing a provider's signature on medical prescriptions, go to To modify or add provider/staff names on page 50.
	• Some states require an original signature on medical prescriptions. Check with your state regulatory agency to find out if printing a signature on prescriptions is legal in your state.

▶   **To record contact lens care regimes**

1   Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2   Click the **Plan** bar.

The **Plan** window opens.

3   Select the **Contact Lenses** check box and click **Process**.

4   The **Contact Lenses** window opens.

5   Select the **Lens Care Regime** check box and click **Process**.

The **CONTACTS (Care Regime)** window opens.

6   Click the text boxes to select lens care solutions and cleaning instructions from the drop-down menus and click **Save Item**.

Notes	• To create and maintain the lens care solution and cleaning instruction menus, press the F12 key. for more information on using the F12 key, go to To use the F12 key on page 24.
	• To add custom text, type text into the **Custom text** box and click **Save Item**.
	• To clear all items from the Description list, click **Clear All Items**.
	• To delete an item from the Description list, select the item and click **Delete Item**.
	• The Disinfection information that is recorded on the Contacts (Care Regimen) window will print on the first final Rx. Selections from the Disinfecting drop-down menu on the Contact Lens Rx - Final window will print on the second and any subsequent final prescriptions.
	• Only the disinfecting information that is recorded for the most recently saved final Rx is displayed under the Plan category bar on the Surgery - Plan - Mgmt tab.

7   Click **Save/Exit**.

The contact lens care regime is displayed on the ExamWRITER chart window and printed on the contact lens Rx.

▶ To record patient management information

1 Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2 Click the **Patient Management** bar.

The **Patient Management** window opens.

3 Select the appropriate **Counseling/Education** and **Exam Time/Recall** check boxes.

Notes	• Blue text is a heading for the black or red text below it.
	• Red text signifies that the corresponding check box has been previously selected and information relating to that text has been previously recorded.

4 Click **Process** or right-click anywhere in the Patient Management window.

Depending on the boxes that you checked, various windows will open with additional check boxes.

5 Select the appropriate check boxes and click **Process**.

Notes	• To add custom text, first select the appropriate check box(es), then click **Custom Text**, type the text, and click **OK**.
	• To clear previous selections on the form, click **Reset Form**.

▶   To assign orders to patients

Note	Press the **F3** key anytime during an exam to open the Orders window and record a patient's examination, surgery, test, consultation, and laboratory orders.

1   Click the **Surgery - Plan - Mgmt** tab on the ExamWRITER chart window.

2   Click the **Patient Management** bar.

The **Patient Management** window opens.

3   Select the **Current and Future Orders** check box and click **Process**.
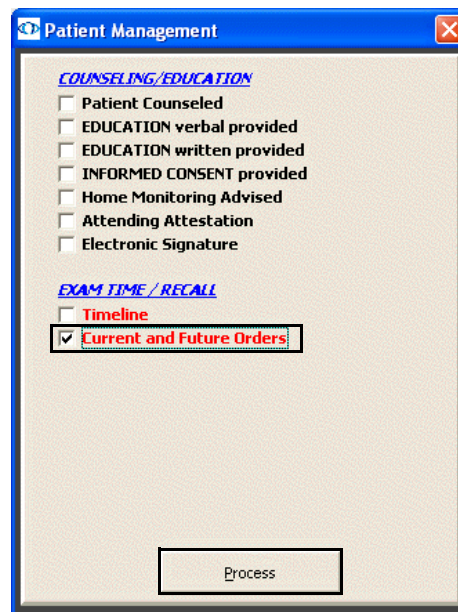
The **Orders** window opens.

4   Select the appropriate **Examination**, **Surgery**, **Tests**, **Consult**, or **Laboratory** radio button to record orders for those items.

5   Select orders in the box on the left of the Orders window.

Notes	• To create and maintain orders, place your cursor in the Search text box and press the **F12** key.
	• To search for orders, type text into the **Search** text box.
	• To add custom text, click **Custom Text** and type text in the text box.

6   Select an eye from the **Eye** drop-down menu.

7   Choose the appropriate dates from the **Timeline** drop-down boxes. To record an order for today, select the **Today** check box.

8   Select an action from the **Action** drop-down menu and a date from the calendar.

Notes	• If you select **Recall** from the Action drop-down menu, the recall will be recorded in the EMR and OfficeMate.
	• If you select **Schedule** from the Action drop-down menu, the appointment will be recorded in the EMR, but no appointment will be scheduled in OfficeMate.

9   If you are an OfficeMate user and you have recalls and the patient's recall type set up in OfficeMate, select a recall type from the **OfficeMate Patient Recall** drop-down menu.

Note	To set up recall types and schedules, click **Setup Recall** and select recall types from the **Recall Type** drop-down menus. To change the recall date, type or select the number of months until the next recall in the **Months to Recall** text box or type or select a recall date in the **Next Recall** text box. Click **Save** to save the new recall type and schedule.

10 If you want to save the order without the timeline and action date, select the **Save WITHOUT Timeline and Action Date** check box.

11   Click **Save(s)**.

12   Repeat steps 4–11 for each recall reason and date.

13   Click **Process**.

▶   ## To modify plan management information

1   Click the **Surgery, Impressions/ Assessment**, **Plan**, and **Patient Management** bars and follow the instructions above for recording information in an EMR.

OR

Click on a bold subheading in the ExamWRITER chart window.

The **Current Information** window opens.

2   Choose the appropriate button at the bottom of the window to add, edit, save, redo, or delete the previously entered text.
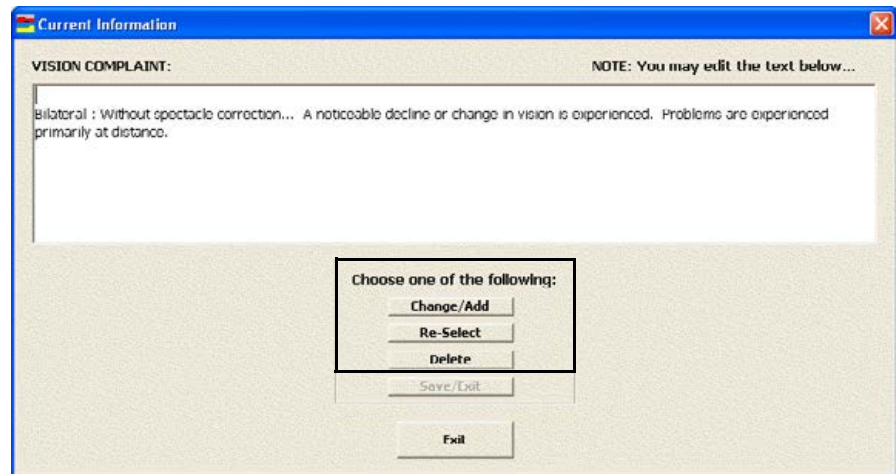
Notes	• After you have finished recording Plan - Management information in an EMR, the **Surgery**, **Impressions/Assessment**, **Plan**, and **Patient Management** bars change in color from orange to green.
	• All abnormal medical conditions appear in red text in the ExamWRITER chart window. All normal medical conditions appear in black text in the ExamWRITER chart window.

Viewing All EMR Information

To view all patient information in an EMR, click the **Full View** tab on the ExamWRITER chart window. Click on the bars or click on a bold subheading to modify information in the EMR. See the sections earlier in this chapter for more information on recording and modifying information in an EMR.

Modifying & Viewing Patient Information

In this chapter:

For more information on modifying and viewing patient information, see the OSSU 601 "Using the Control Center" iTrain.

Note	To add a new patient to ExamWRITER, go to To add new patient demographic information on page 55.

Modifying & Viewing Patient Demographic Information

Note	If you are an OfficeMate user, any modifications or additions that you make to patient demographic information in ExamWRITER will be reflected in OfficeMate. Likewise, any modifications or additions that you make to patient demographic information in OfficeMate will be reflected in ExamWRITER.

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Modify the patient demographic information in the text boxes, type notes in the **Notes** text box, and type medical alerts in the **Alert** text box, if desired.

3   Click **Save** to save modified information.

4   Click **Exit** to close the Patient Information Center window.

Viewing Exam History

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Click the **Exam Hx** tab to view the patient's family members' exam history and the patient's exam history.

Notes	• The patient's family members' exam history is only available if you are an OfficeMate user and if the patient and his or her family members have OfficeMate patient records.
	• If you have diagnosis codes recorded in previous exams that are outdated and no longer appear on the Diagnosis Codes tab on the Customization window, they will not appear in the Diagnosis/Problem List on the Patient Information Center window.
	• To display PQRI procedure codes in the Procedures Performed table and keep track of PQRI reporting, select the **Show PQRI** check box.

3   Click **Exit** to close the Patient Information Center window.

Viewing Glaucoma Elements

1 Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2 Click the **Glaucoma Elements** tab.

3 Click the **Enter Hx** buttons to record historical Glaucoma elements. For information on recording these elements, go to Recording Examination Information on page 182.

Notes	• You cannot record blood pressure, pulse, pachymetry, CD ratio, and IOP observations after clicking the **Enter Hx** buttons on the Glaucoma Elements tab. To record observations for these elements, you must be in the patient's exam record.
	• To delete a Glaucoma element value, right-click on it and click **Yes**. If you delete historical Glaucoma elements from the Patient Information Center, they will also be deleted in final exams.

eyefinity/OfficeMate

4   Click the **Show Graph** buttons to view blood pressure and pulse, pachymetry, CD ratio, and intra-ocular pressure graphs.

Notes	• The intra-ocular pressure graph is the default graph that is displayed.
	• You can only view graphical intra-ocular pressure measurement histories for Examination tests. You cannot view graphical intra-ocular pressure measurement histories for Pre-Test and Post-Dilation tests.
	• Click the **Copy to clipboard** icon to copy the Glaucoma element graph displayed to the clipboard and paste it into another document; click the **Print Preview** icon to preview the printed version of the graph; and click the **Print** icon to print the graph.
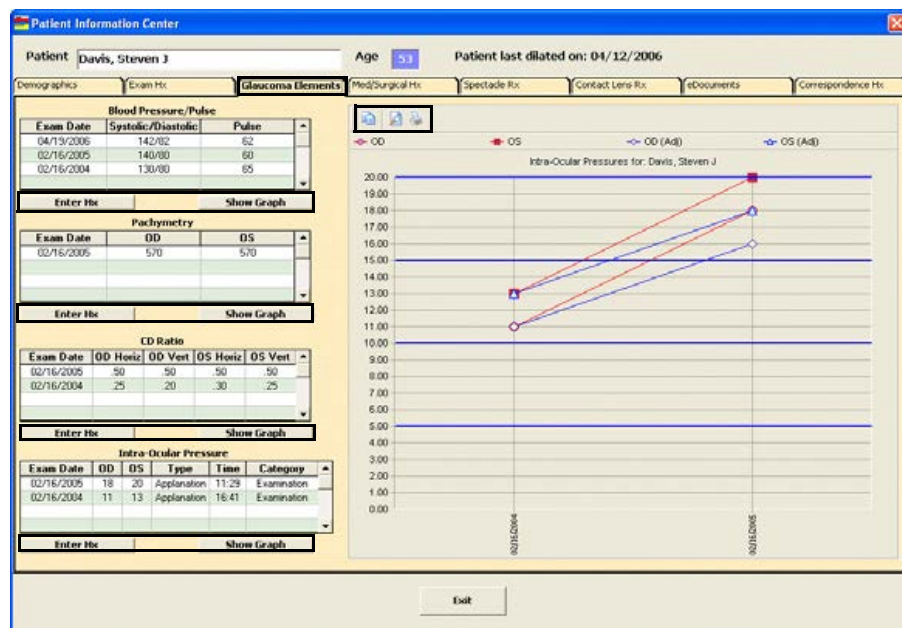
5   Click **Exit** to close the Patient Information Center window.

Viewing & Refilling Prescriptions

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Click the **Med/Surgical Hx** tab.

Note	To mark or unmark a medication as being discontinued, right-click on the medication in the Medication History, Medical Hx, Surgical Hx, Ocular Hx, or Ocular Surgical Hx table and select **Discontinue** or **Remove Discontinue**. Select a date from the **Date Discontinued** calendar and click **Save**. The discontinued date appears in the Date column in the Medication History window. You can also mark medications as being discontinued from the Patient Systemic Medications and Patient Ocular Medications windows. For more information on marking medications as being discontinued from these windows, go to To record patient history information on page 97.

3   Right-click on a current therapeutic Rx or click **Refill** to open the Medication Order window and refill a prescription. For more information on writing and refilling prescriptions, go to To write medication prescriptions on page 200.

4   Click **Exit** to close the Patient Information Center window.

Viewing Spectacle Prescriptions

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Click the **Spectacle Rx** tab.

3   Select a prescription type from the **Select Rx type** drop-down menu.

Notes	• To create a lab order (if one has not already been created) for a finalized exam, right-click on a finalized exam final or alternate Rx and select **Create Lab Order**. An addendum is created in the finalized exam noting that you have created a lab order.
	• To successfully create a lab order for a finalized exam, you must open the Patient Information from the ExamWRITER Control Center (*not* from within an exam).

4   Click **Exit** to close the Patient Information Center window.

Viewing Contact Lens Prescriptions

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Click the **Contact Lens Rx** tab.

3   Select a prescription type from the **Select Rx type** drop-down menu.

4   Select the **Show ALL** or **Rx type** Display Options radio button to display all contact lens prescriptions or display a specific type of prescription.

5   If you selected the Rx type Display Options radio button, select a prescription type from the **Select Rx type** drop-down menu.

Notes	• To create a lab order (if one has not already been created) for a finalized exam, right-click on a finalized exam final or trial Rx and select **Create Lab Order**. An addendum is created in the finalized exam noting that you have created a lab order.
	• To successfully create a lab order for a finalized exam, you must open the Patient Information from the ExamWRITER Control Center (*not* from within an exam).

6   Click **Exit** to close the Patient Information Center window.

Attaching Electronic Documents to Patient Records

Note	In addition to attaching electronic documents to patient records in the Patient Information Center, you can also add, edit, delete, view, and print a list of electronic documents attached to a patient's exam record by clicking the **Images - Drawings** tab and then clicking the **Images, Drawing and Graphic** category bar on the ExamWRITER chart window.

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Click the **eDocuments** tab.

3   Select the **All Exams** or **This Exam Only** Display Documents from radio button and click **Show eDocs** to display electronic documents from all exams of from the current exam only.

Notes	• Double-click on a document to view or edit it.
	• To edit a document's information, select the document, click **Edit**, and review steps 5-10 below.
	• To delete an electronic document, select the document and click **Delete**.
	• To print a list of the patient's electronic documents, click **Print List**.
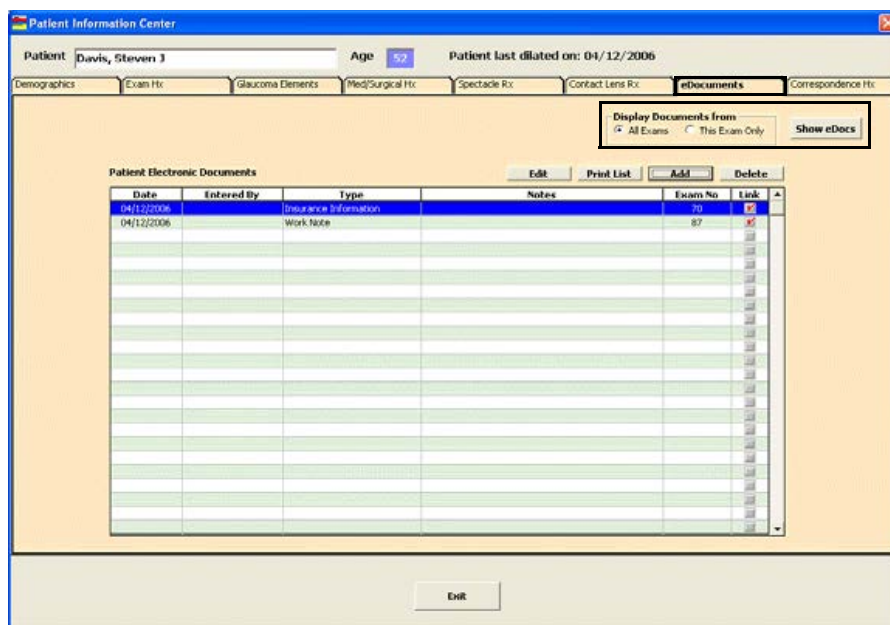
4   Click **Add** to add a new electronic document to the patient's record.

The **eDocuments Information** window opens.

5   Select a document type from the **Document Type** drop-down menu.

Note	Press the **F12** key to open a **Code Maintenance** window and add new items to the Document Type menu.

6   If you want to attach an electronic document to a specific exam record, select the **Attach Document to Exam** check box and select an exam.

7   If you want to add notes to the form, type them in the **Notes** text box.

8   Click **Browse** to navigate to and select an electronic document to link to the patient's record.

OR

Click **Scan** to scan documents directly into ExamWRITER and save them as an eDocument in the patient's record.

For more information on scanning documents into ExamWRITER, see the OSSU 603 "Images, Drawings, & Graphics" iTrain.

Notes	• Because all documents scanned directly into ExamWRITER must be saved as PDF files, you must have Adobe Reader installed on your computer. Go to www.adobe.com to download and install Adobe Reader for free.
	• OfficeMate Software Solutions does not recommend a specific scanner brand or model; you can use any scanner that can create an electronic document with the ExamWRITER eDocuments feature. For more information on scanners, go to http://www.officemate.net/omkb/article.aspx?id=10958, or consult your hardware technician.
	• OfficeMate Software Solutions does not support your hardware and highly suggests consulting your hardware technician before purchasing a scanner to use with your computer. For installation, support, and troubleshooting issues related to your scanner, contact the scanner's manufacturer.

9   If you clicked Scan in step 8, follow the instructions below; otherwise, skip to step 10:

a.   Select the following Scan Options on the Scan Document(s) window:

B/W if you want to scan the document in black and white.

Greyscale if you want to scan the document in greyscale.

Color if you want to scan the document in color.

Duplex if you want to scan two sides of a document (and if it is supported by the scanner).

Hide UI if you want to hide the scanner's user interface. If you deselect this check box then the scanner's interface will open with additional scanning options. For information about these additional options, view the scanner's documentation.

b.   Click the **...** (ellipse) button in the Scan Options box to open the Select Source window and select a scanner.

Note	If you select a different scanner from the one that is already displayed on the blue title bar in the Scan Document(s) window, the window will close and you will have to reopen it by clicking Scan on the eDocuments Information window.

c.   Click **Start Scan** to scan the document.
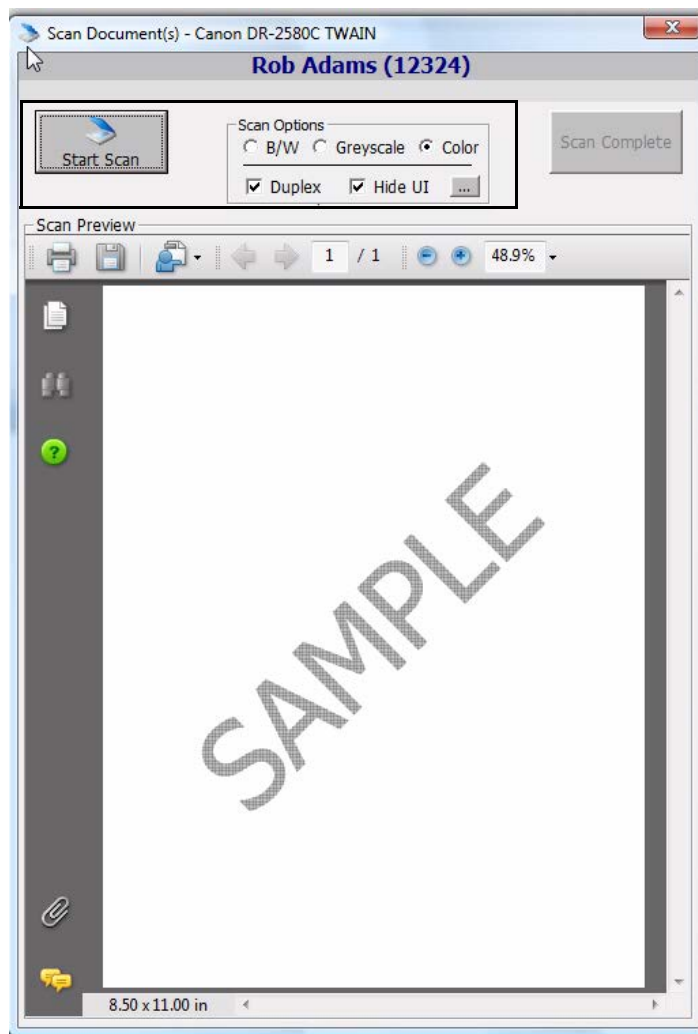
d.   Click **Scan Complete** after the document is finished scanning.

Note	Do *not* click the Save icon in the Scan Preview section of the Scan Document(s) window to save the document. You *must* click the Scan Complete button to properly save the document.

ExamWRITER automatically names the document using the current date and saves it as a PDF file in the OMATE32\DATA\eDocuments folder.

10   Click **OK**.

Electronic documents are visible and accessible under the Images, Drawing and Graphics category bar on the Images - Drawings tab.

Note	The **Entered By** column is populated only if your ExamWRITER security is active.

11   Click **Exit** to close the Patient Information Center window.

Viewing Corresponden ce History

1   Click the **Patient Hx** icon in the top left of the ExamWRITER chart window or select a patient in the ExamWRITER Control Center window and click the **Patient Hx** icon.

The **Patient Information Center** window opens.

2   Click the **Correspondence Hx** tab.

3   Select a correspondence type from the **Correspondence Type** drop-down menu.

4   Type or select dates in the **From Date** and **To Date** boxes.

5   Click **Search** to search for and display the correspondence history based on the parameters you specified in steps 3-4 or click **Show Correspondence** to view the list of correspondences.

6   Click **Print** to print the correspondence history, if desired.

7   Click **Exit** to close the Patient Information Center window.

Selecting Diagnosis & Procedure Codes

For more information on selecting diagnosis and procedures codes and using Quick Code, see the OSSU 604 "Completing the Examination" iTrain and the OSSU 600-3 "Completing the Exam" training course.

In this chapter:

Using Quick Code

Use ExamWRITER's Quick Code function to accurately and automatically determine the level of medical code documentation (based on the *Evaluation and Management Services Guide* by the Centers for Medicare & Medicaid Services (CMS)) needed for billing purposes on new exams. The check box selections that you record in a patient's exam record that relate to 99xxx procedure codes are tallied and recorded in the Documented Elements row on the E&M Quick Code Check window.

1   Click the **Quick Code** icon in the top left of the ExamWRITER chart window.

The **E&M Quick Code Check** window opens.

2   Note the appropriate code for billing purposes.

The lowest level of code that you have selected (as denoted by purple boxes) is what you are able to bill a patient. To meet CMS guidelines, you cannot bill a level 5 E&M code unless all of the boxes in the level 5 row are purple. For example, if there is a purple HPI box in the level 2 row and purple ROS, PFSH, Phys Exam, Diag/Mgmt, and Risk boxes in the level 5 row, you must bill the level 2 E&M code unless you document additional HPI elements to create a purple HPI box in the level 5 row.

Notes	• Grey boxes denote elements that you have not documented or coding levels that you have not reached.
	• Purple boxes denote coding levels that you have reached.
	• Green rows denote the coding level that you have already selected in the Diagnosis/Procedure Coding window (if applicable).
	• A red E&M Code box denotes an alternate E&M code that you can bill based on elements that you have already documented (if applicable).

3   If an insufficient number of elements were documented in the exam, click the heading of the insufficient aspect to go to the insufficient portion of the exam and add the necessary information. See Creating, Modifying, & Viewing EMRs on page 77 for more information on adding exam information.

To meet CMS guidelines, you must document two out of three areas (History, Exam, and/or Medical Decision) for established patients. To meet CMS guidelines, you must document all three areas (History, Exam, and Medical Decision) for new patients; new patients are patients who have not been seen in your practice in at least three years.

Notes	• If you click the **HPI** (History of Present Illness), **PFSH** (Past, Family, and/or Social History), or **Diag/Mgmt** headings, windows open for you to select and process exam information. See Creating, Modifying, & Viewing EMRs on page 77 for more information on adding exam information.
	• If you click the **ROS** (Review of Systems) or **Phys Exam** headings, a **Quick Code Review** window opens. Click **Process** to select and process exam information. See Creating, Modifying, & Viewing EMRs on page 77 for more information on adding exam information.
	• If you click the **Risk** heading, the **Risk Factors** window opens for you to select a risk factor.
	• Click **Coding** and open the Diagnosis/Procedure Coding window and record and modify coding information.

Selecting Diagnosis and Procedure Codes

This section tells you how to assign billing codes to exams, including how

▶ To select diagnosis codes

1   Click the **Coding** icon in the top left of the ExamWRITER chart window.

The **Diagnosis/Procedure Coding** window opens.

2   Click the **Diagnosis** tab.

The diagnosis codes are automatically displayed in the Selected Diagnosis table for the impressions that you recorded in the exam.

Notes	• If you receive a **No Data** error when you open the Diagnosis/Procedure Coding window, click **OK** and see Maintaining Product and Service Information on page 56 to add services to your exam.
	• By default, the diagnosis codes displayed are 367.xx (refractive error codes) in numerical order. To view all of the diagnosis codes, click the **All** radio button in the **View Diagnosis** box.

3   Double-click diagnosis codes to add them to the **Selected Diagnosis** table.

OR

Click **Auto Code** to automatically populate the Selected Diagnosis table.

| Notes	• To automatically populate the Selected Diagnosis table, click **Auto Code**.
	• If you copied forward a version 7.x exam, click **Clear All** and then click **Auto Code** to populate the Selected Diagnosis table with codes from the previous and new exam records.
	• If you copied a version 6.4 or below exam forward, you must rerecord the impressions in the exam record in order to automatically assign diagnosis codes in the exam record.
	• If there are no diagnosis and procedure codes to record for this exam, click **No Diagnosis No Procedure Codes**.
	• Click **Quick Code** to open the E & M Quick Code Check window and reference quick code information. For information on the E & M Quick Code Check window, go to Using Quick Code on page 248.

4   If you want to delete the diagnosis codes from the Selected Diagnosis table and manually record the codes and modifiers, follow the instructions below; otherwise, go to step 5:

a.   Click **Clear All**.

b.   Select modifiers for the diagnosis codes that you are going to use from the **Modifier** drop-down menus.

c.   Double-click on the appropriate diagnosis codes to move the selected codes and modifiers to the Selected Diagnosis table.

5   Click the arrows to the left of the table to rearrange or delete the codes in the Selected Diagnosis table. You can move codes up or down one row at a time, move a code to the top of the list to make it the primary diagnosis code, or move a code to the bottom of the list.

6   Click **Save/Exit**.

Note	Although you can select an unlimited number of diagnosis codes in ExamWRITER, only the codes listed in the first six rows of the Selected Diagnosis table will appear on the ExamWRITER chart window and transfer to OfficeMate.

▶ ## To select procedure codes

1   Click the **Coding** icon in the top left of the ExamWRITER chart window.

The **Diagnosis/Procedure Coding** window opens.

2   Click the **Procedures** tab.

The procedure codes are automatically displayed in the Selected Procedures table based on your exam selections.

Notes	• You must select CPT codes for your services before you code an exam in order for the service to appear in the Diagnosis/Procedure Coding window. If you receive a **No Data** error when you open the Diagnosis/Procedure Coding window, click **OK** and see Maintaining Product and Service Information on page 56 to add services to your exam.
	• By default, the procedure codes displayed are 92xxx (nonmedical or "wellness visit" codes) in numerical order. To view all of the procedure codes, click the **All** radio button in the **View Diagnosis** box. To view the 992xx (evaluation/management (E/M) or "sick eye visit") procedure codes, click the **992xx** radio button in the **View Diagnosis** box. To view only the PQRI procedure codes, click the **PQRI** check box.
	• Click the **Show Quick List** check box to view only the services that you frequently use. For more information on adding services to your Quick List, go to Maintaining Product and Service Information on page 56.
	• Click **Quick Code** to open the E & M Quick Code Check window and reference quick code information. For information on the E & M Quick Code Check window, go to Using Quick Code on page 248.

3   Double-click procedure codes to add them to the **Selected Procedures** table.

OR

Click **Auto Code** to automatically populate the Selected Procedures table.

Notes	• For the auto code feature to work properly with unilateral procedure codes (92226, 92135, 76519, 92225, and 92235), you must ensure that separate unilateral procedure codes for each eye are set up in the Customization window (Procedure Codes tab) in OfficeMate or ExamWRITER (for example, 92226 RT and 92226 LT) prior to coding exams. For the auto code feature to work properly with surgical procedure codes (67850, 68200, 68810, 67515, and 65860), you must also ensure that the procedure codes are set up in the Customization window. Then, you must open the services in the Products window and select the appropriate right or left eye modifier for the procedure code. For more information on setting up procedure codes, go to To add procedure codes on page 49. For more information on selecting modifiers in the Products window, go to Maintaining Product and Service Information on page 69.
	• If there are no diagnosis and procedure codes to record for this exam, click **No Diagnosis No Procedure Codes**.

4   If you want to delete the procedure codes from the Selected Diagnosis table and manually record the codes and modifiers, follow the instructions below; otherwise, go to step 5:

a.   Click **Clear All**.

b.   Select modifiers for the procedure codes that you are going to use from the **Modifier** drop-down menus.

c.   Double-click on the appropriate procedure codes to move the selected codes and modifiers to the Selected Procedures table.

5   Click the arrows to the left of the table to rearrange or delete the codes in the Selected Procedures table. You can move codes up or down one row at a time, move a code to the top of the list to make it the primary procedure code, or move a code to the bottom of the list.

6   Click **Save/Exit**.

Note	Only the first 20 procedure codes selected in a new exam and listed in the Patient Open Charges window will transfer to a patient's fee slip. If you do not want to post these charges, select them and click Close out.

If you selected 992xx procedure codes and have not yet assigned a risk factor to your medical decisions, the Risk Factors window opens. Click **None**, **Minimal**, **Low**, **Moderate**, or **High** to record a risk factor.
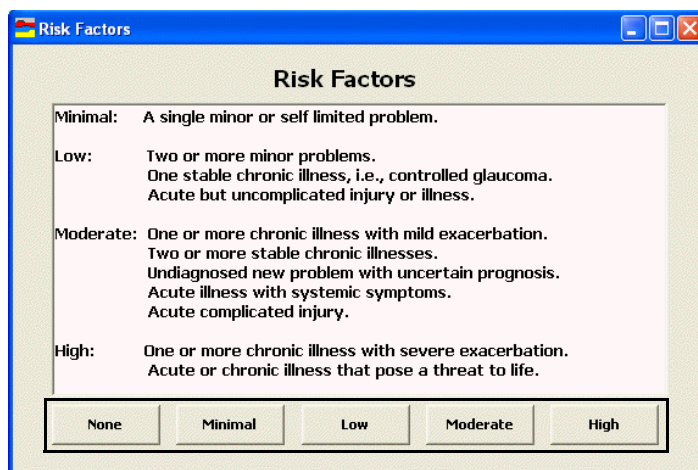
If you select a 992xx procedure code, the E & M Quick Code Check window automatically opens so that you can reference quick code information. For more information on using the Quick Code feature, go to Using Quick Code on page 248.

CHAPTER 6

Printing EMRs

Notes	• The EMRs open and print using Microsoft Word. You can modify the EMRs and send the records to e-mail and fax recipients using Microsoft Word tools. Before sending the EMRs via e-mail and fax, ensure that you are complying with HIPAA guidelines.
	• To print an ExamDRAW drawing, go to Using ExamDRAW on page 259.

1 Click the **Print** icon in the top left of the ExamWRITER chart window.

2 Select one of the following options from the drop-down list:

– **Exam** to print the entire exam.

– **View Exam** to view a screenshot of the entire printed exam.

– **Auto Letter** to view an automatically generated exam letter.

Note	Select a correspondent from the **Correspondent Select** window before viewing the Auto Letter.

– **Spectacle Rx** to print the spectacle prescription.

– **Alternate Rx** to print the alternate prescription.

– **Contact Lens Rx** to print the contact lens prescription.

– **Trial Contact Rx** to print the trial contact lens prescription.

CHAPTER 7

Creating, Modifying, & Viewing Exam Notes

1   Click the **Notes** icon in the top middle of the ExamWRITER chart window.

The **Notes Menu** window opens.
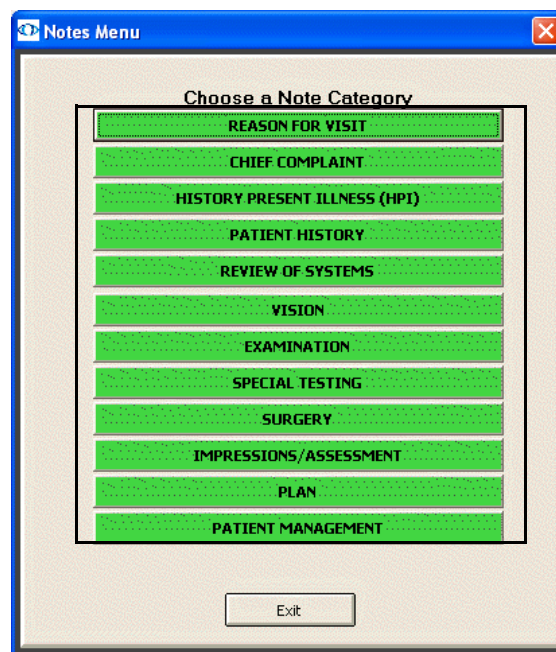
2   Click a note category.

The **Notes** window opens.

3   Type your notes.

4   Select the **Date Stamp this note** check box if you want the date you recorded the note to appear in the note.

5   Click **Save/Exit** or click **Delete** to delete the note.
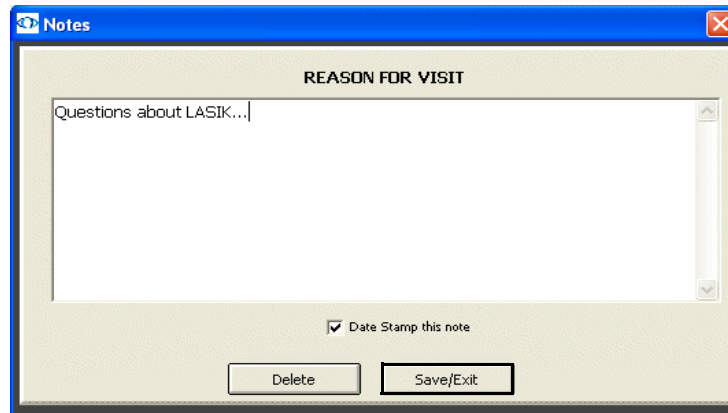
CHAPTER 8

Using ExamDRAW

In this chapter:

For more information on using ExamDRAW, see the OSSU 603 "Images, Drawings, & Graphics" iTrain.

Explanation of Interface Elements

Figure 8-1 depicts the ExamDRAW window interface elements.

Diseases   Drawing Tabs   Drawing Options

Tools, Size, Opacity, Colors   Autotext and Comments   History Slider Bar
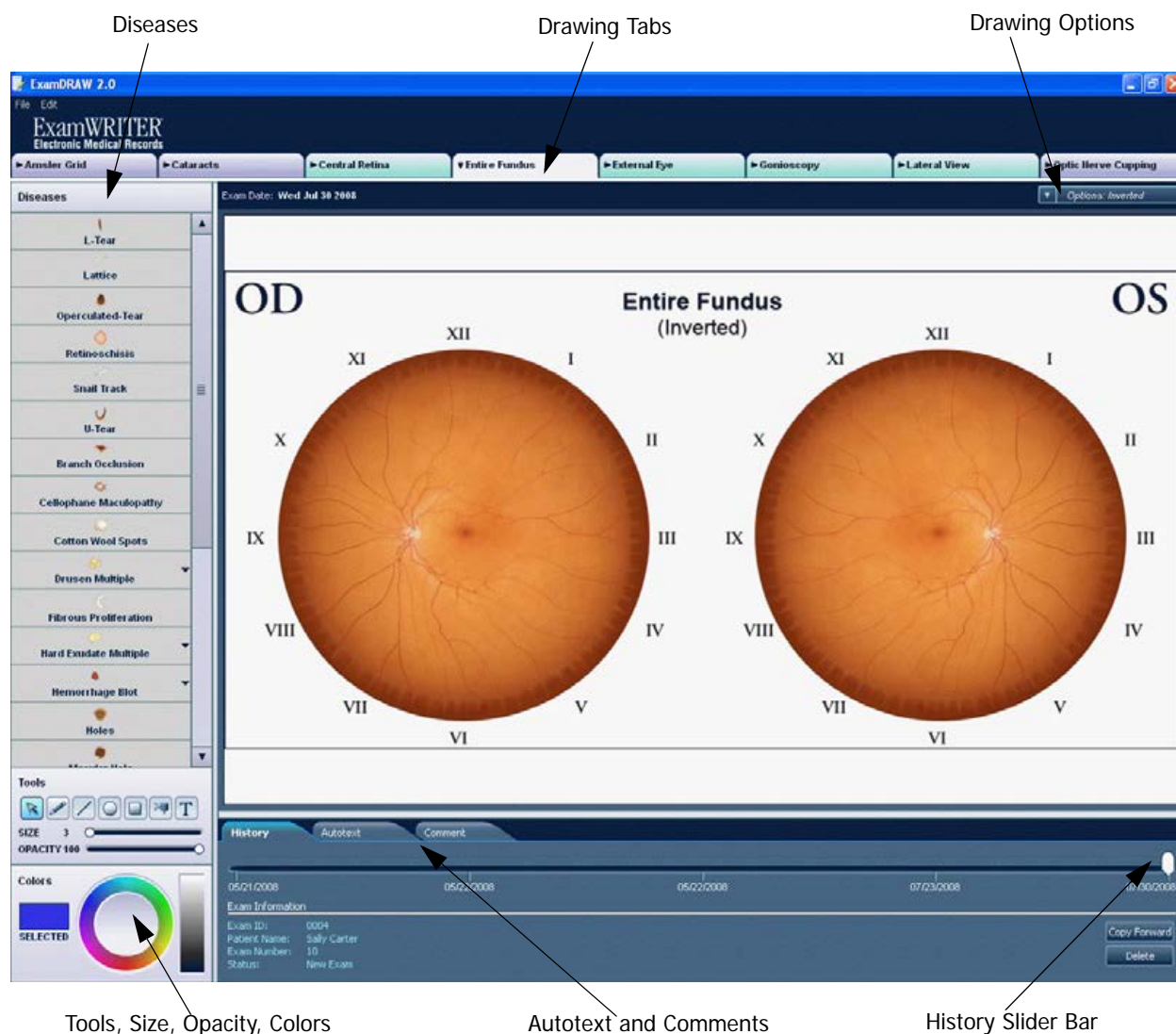
Figure 8-1: ExamDRAW Interface Elements

Creating & Modifying Exam Drawings

1   Click the **ExamDRAW** icon in the top middle of the ExamWRITER chart window.

The **ExamDRAW Options** window opens.

2   Select a template and click **Continue**.
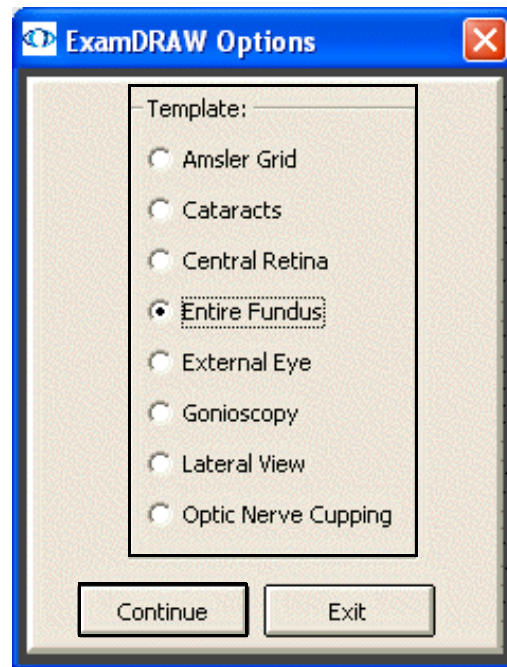
The **ExamDRAW** window opens.

3   If you want to copy the drawing from a previous date forward to the current date to modify and record it on the current date, click **Copy Forward**.

Note	To view a historical record of a patient's drawings, move the white slider bar to the desired date on the timeline or press your keyboard's left and right arrow keys.

4   If you want to add auto text to the drawing and the Autotext tab when you add a disease, click **File**, select **Configure**, and follow the instruction below; if you have already defined your auto text drawing options, skip this step.

   a.   Ensure that the **Disease state text** check box is selected to insert auto text on the drawing.

   b.   Select a font style from the **Font** drop-down menu.

   c.   Type or select a font size from the **Size** menu.

   d.   Select the **Bold** and **Italic** check boxes, if desired.

   e.   Click **OK**.
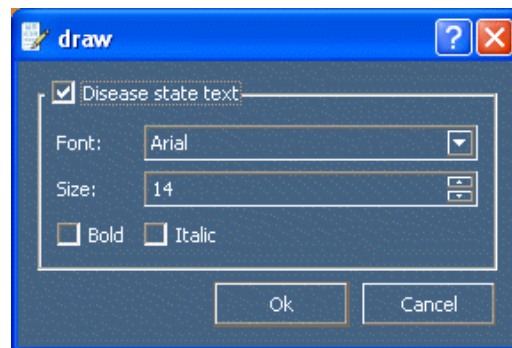
5   Select the **Diseases**, **Tools**, **Size**, **Opacity**, and **Colors** that you want to use.

6   If you are creating a central retina or entire fundus drawing and you want to draw on an inverted image, select **Inverted** from the **Options** drop-down menu.

7   If you are creating an external exam drawing and you want to modify the size of the pupils, select a size from the **Options** drop-down menu.
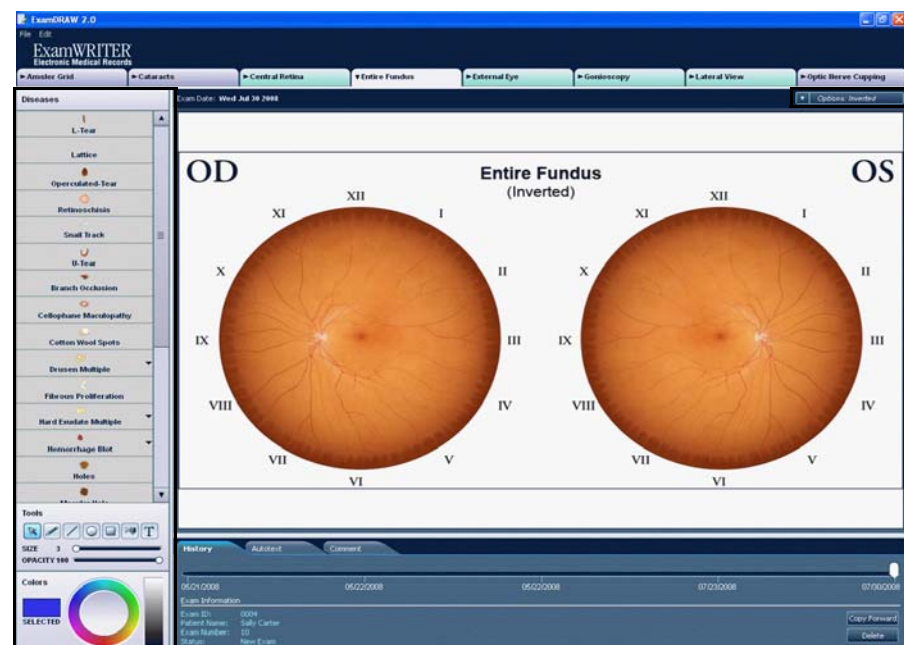
8   Draw on the eyes.

a.   Select a disease from the **Disease** column on the left side of the window.

b.   If the disease has a drop-down menu, select the most appropriate option.

c.   Click on the eyes to indicate where the disease is present.

Auto text is automatically added to the Autotext tab when you add a disease to a drawing. The retina location is documented in Disc Diameters and clock position on the Autotext tab for central retina and entire fundus drawings. If you do not want to use the auto text, deselect the check box next to the auto text on the Autotext tab. You can use the text tool (the **T** icon) to add your own text to the drawing. To add comments to the auto text that appears when you draw on the eye, click the **Autotext** tab, double-click in the **Comments** column next to the auto text, and type your comments.

Notes	• To undo, redo, or clear changes that you have made to a drawing, click **Edit** from the main menu toolbar and select **Clear Changes**, **Undo**, or **Redo**.
	• To delete diseases or text that you have placed on the eyes, left-click on the disease or text and select **Delete**.
	• After you have recorded a drawing using a template and saved it, the tab denoting that template turns green. If you have recorded a drawing using a template but have not saved it, the tab denoting that template turns pink.
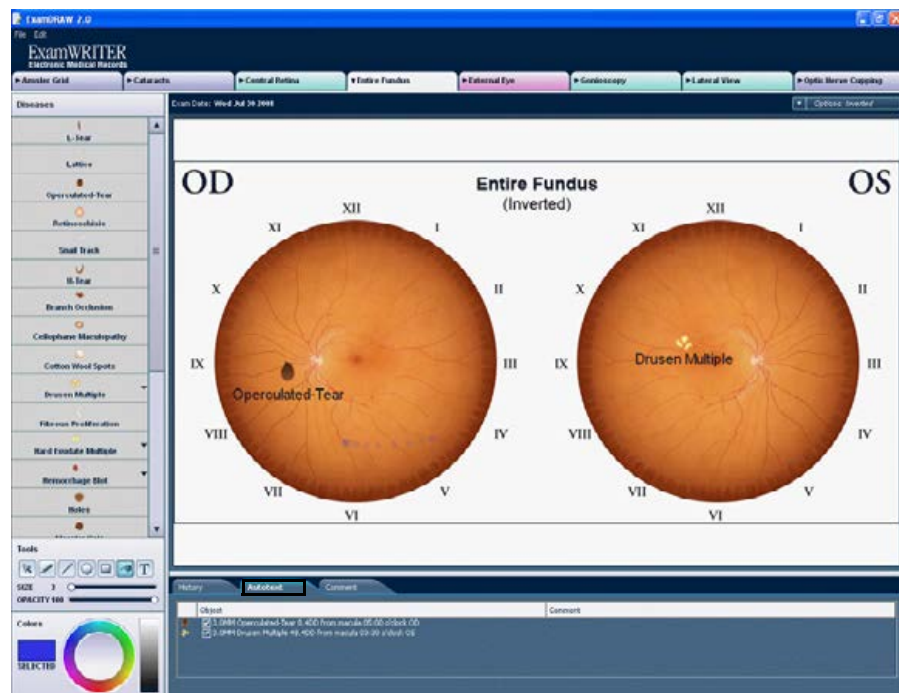
9   Click the **Comments** tab to add general comments to the drawing.

10   Click the tabs at the top of the ExamDRAW window to create other drawings.

11   Click the **X** in the upper right corner of the window to save the drawing and exit
      ExamDRAW.

      The **Save and Exit** window opens.

12   Click **Yes** to save the drawing(s).
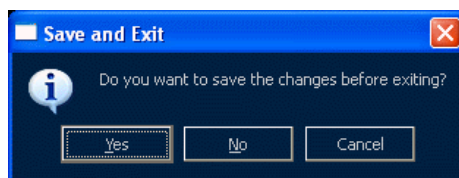
ExamDRAW drawings are visible and accessible under the   Images, Drawing
and Graphics category bar on the Images - Drawings tab in ExamWRITER.

Deleting Exam Drawings

1   Click the **Images - Drawings** tab on the ExamWRITER chart window.

2   Click on an ExamDRAW drawing under the Images, Drawing and Graphics
     category bar.

     The **ExamDRAW** window opens.

3   Click **Delete** to delete the drawing.
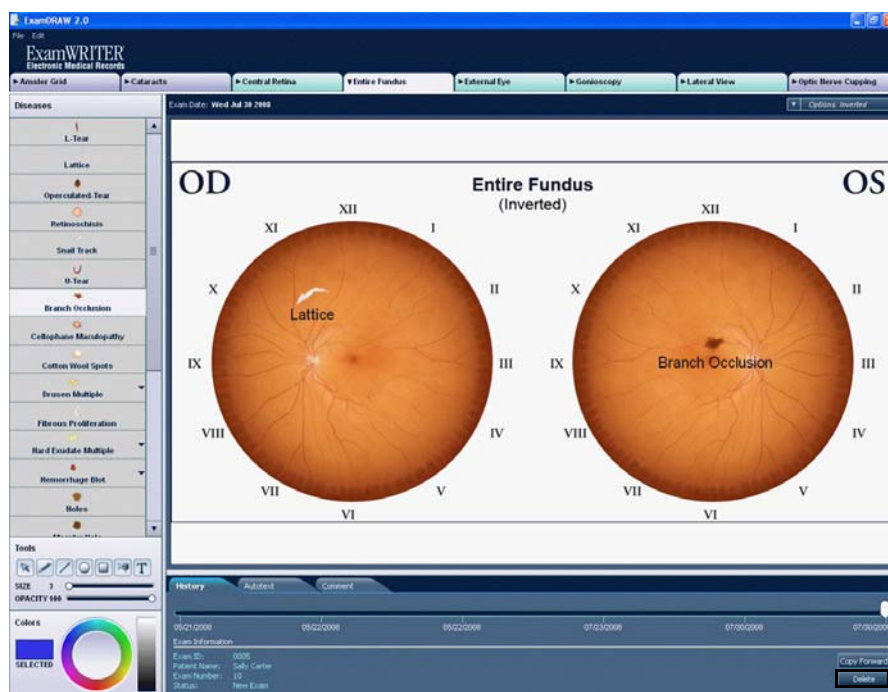
CHAPTER 9

Finalizing EMRs

For more information on closing and finalizing EMRs, see the OSSU 604 "Completing the Examination" iTrain and the OSSU 600-3 "Completing the Exam" training course.

In this chapter:

Finalizing Individual EMRs

Note	You *must* click the **Coding** icon in ExamWRITER, verify or add diagnosis and procedure codes on the Diagnosis/Procedure Coding window, and click **Save/Exit** before ExamWRITER will allow you to finalize an exam. If you have automatically recorded procedure codes in the exam, but the "Coding is Incomplete, Click Continue to Code Exam." message appears, then you have not saved the codes in the Diagnosis/Procedure Coding window and you must do so before finalizing the exam. For more information on verifying and adding diagnosis and procedure codes in exams, go to Selecting Diagnosis and Procedure Codes on page 249.

1   Click the **Finalize** icon in the top left of the ExamWRITER chart window.

The **Exam Finalization** window opens.

2   If the **Exam Review** indicates that the Coding is Incomplete, click **Continue**; otherwise, select the **Activities** that you want to perform.

For more information on coding, go to Selecting Diagnosis & Procedure Codes on page 247.

Note	If the Assessment/Plan and Patient Management sections of the EMR are incomplete, a yellow warning message appears; however, you will not be prevented from finalizing and closing the EMR.

For more information on selecting Activities, go To define and change general preferences on page 43.

3   Select the **CLOSE record** or **FINALIZE record** radio button.
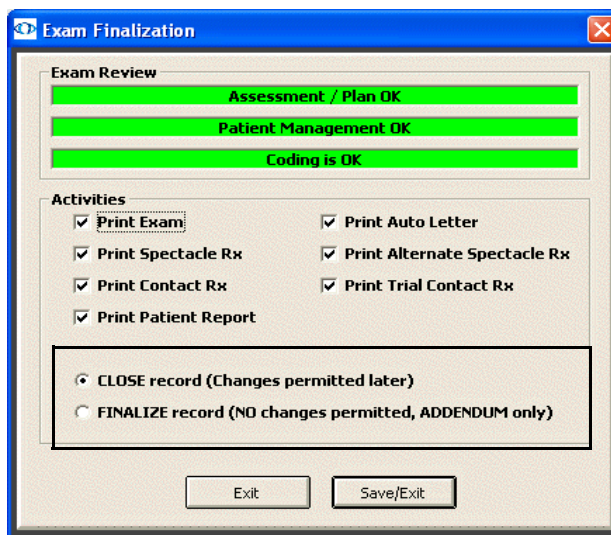
Notes	• If you choose to close the record, you will be able to open the record at a later time and review it and make changes. Closing the record gives you the ability to review the record at the end of the day before you finalize it.
	• If you choose to finalize the record, you will be able to open the record at a later time, but you will not be permitted to make changes. You will only be able to make additions and changes to the EMR in an addendum. For information on adding addendums, go to Adding Addendums to EMRs on page 269.

4   Click **Save/Exit**.

Finalizing Multiple EMRs

1   Click the **Chart Search** tab on the ExamWRITER Control Center window.

2   Search for a group of exams to finalize:

a.   Choose a date range for your search from the date **From** and **to** boxes.

b.   Select an exam status from the **Status** drop-down menu.

c.   Select a provider from the **Provider** drop-down menu.

d.   Click **Search**.

3   Click **Finalize**.

The **Confirm** window opens.

4   Click **Yes** to finalize all of the closed exams that are displayed

Adding Addendums to EMRs

1 Open a finalized exam. For more information on opening exams, go to Opening Saved Patient Exam Records on page 88.

2 Click the **Addendum** icon on the ExamWRITER chart window.

The **Addendum Menu** window opens.

3 Select a category type to which you want to add an addendum.
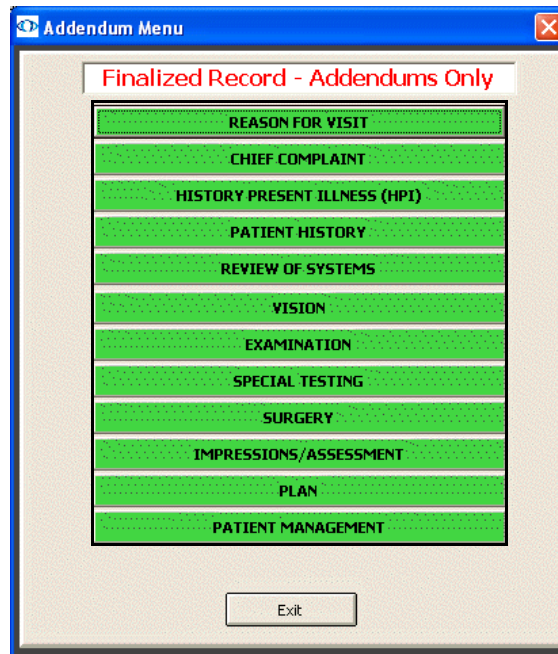
The **Addendum** window opens.

4 Type the addendum's text.

5 Select the **Date Stamp this note** check box if you want the date you recorded the addendum to appear in the addendum.

6   Click **Save/Exit**.

Red text denoting the addendum and its associated category appears in the top right corner of the ExamWRITER chart window. The date and time is stamped to the addendum, and if security is active, the name of the person recording the addendum is also recorded. For more information on activating security, go to Customizing Security Preferences on page 39.

Backing Up & Restoring Data

In this chapter:

Back up your ExamWRITER database files on a regular basis! A full database backup is the best way to make sure that you can recover your ExamWRITER database files in the event of a database corruption, hardware or software failure, computer virus attack, fire, theft, or natural disaster.

Notes	
	• OfficeMate Software Solutions limits the support it provides exclusively to its own products and therefore does *not* provide assistance and support for *any* issues related to the backup and restoration of data.
	• OfficeMate Software Solutions recommends backing up your OfficeMate and ExamWRITER data *every day*.
	• OfficeMate Software Solutions recommends using *multiple* back up methods and backing up your data to *multiple* files in case one backup file is corrupt.
	• The ExamWRITER program does *not* provide backup functions.

Automatically Backing Up SQL & Access Databases

Although there are many types of backup media that you can use to back up your database files (such as CD-R, CD-RW, Zip disk, and Jaz disk), OfficeMate Software Solutions recommends using iBackup Powered by DataHEALTH for data backup and off-site storage. iBackup Powered by DataHEALTH protects your practice by automatically backing up, encrypting, and storing your data in a secure, off-site data center. If you experience a data loss, all of your lost files are recoverable anytime with the click of a button. iBackup Powered by DataHEALTH also offers the following benefits:

- Helps you comply with HIPAA privacy and security

- Electronically copies your files through a cable or phone line

- Assures you that your data is being properly backed up and securely stored

- Tells you which files you need to back up

- Uses FastBIT duplication technology to decrease the size of your files

- Offers hands-on customer service including Web training and installation

- Provides great value and peace of mind for the cost of a one-time setup fee and as little as $1.00 per day

OfficeMate iBackup Powered by DataHEALTH offers a free 30-day, obligation-free trial! For more information on this offer and iBackup Powered by DataHEALTH, contact John Lee at 1.800.269.3666, extension 5036, or http://www.officemate.net/officemate_va_DataHEALTH.aspx.

Manually Backing Up Databases

This section tells you how to manually back up your database, including how

- To manually back up an Access database, 272

- To manually back up a SQL database, 274

▶ To manually back up an Access database

Note	If you are not familiar with your backup procedures, contact your local computer administrator or the manufacturer of your backup media.

1   Close OfficeMate and ExamWRITER on all of your computers.

Note	The integrity of your backup is severely compromised, and in some cases invalidated, if you perform a backup while OfficeMate and ExamWRITER are open.

2   Review your backup device and media manufacturer's replacement recommendations and ensure that your backup device and media are within their useful product lifecycle.

3   Clearly label the backup media that you are using for each day of the week that your office is open for business.

4   Review the HIPAA security and privacy requirements and ensure that your backup procedures are compliant.

5   Navigate to **OMATE32\DATA** and back up this folder.

Note	If you are storing eDocuments or electronic claims in a location other than OMATE32\DATA, ensure that you also navigate to the location of these documents and back them up.
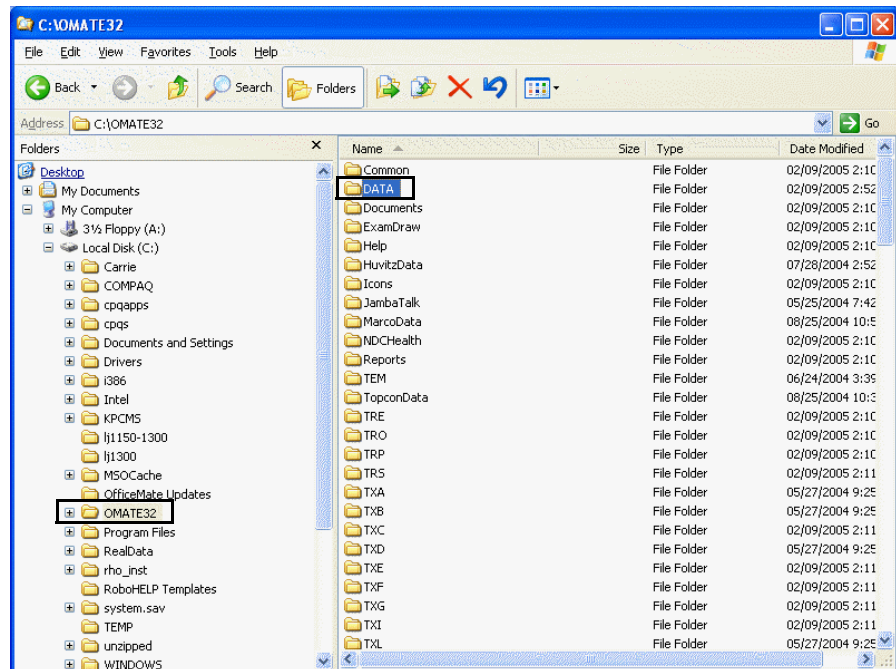
6   Ensure that the backup process is successfully copying the entire folder to the backup media.

Note	You may also back up your data to a temporary folder to ensure that all of your important data has been successfully backed up.

7   Move the backup media off site everyday and store it in a secure location.

▶   To manually back up a SQL database

Notes	• If you are not familiar with your backup procedures, contact your local computer administrator or the manufacturer of your backup media.
	• Because you cannot back up your SQL database with a simply copy function; you must use another tool, such as SQL Server 2005 Management Studio Express Edition, to back up your SQL database. For information on using the SQL Server 2005 Management Studio Express Edition to back up and restore your database, read *Managing SQL Server Express with SQL Server 2005 Management Studio Express Edition* at www.officemate.net/pdfs/Managing_SQL_Server.pdf.
	• Ensure that whatever back up method you use is SQL compatible and is capable of backing up your entire SQL database and shared data directory.

1   Before you begin a backup process with a media type that is *not* OfficeMate iBackup Powered by DataHEALTH, ensure that you have

   – Closed OfficeMate and ExamWRITER on all of your computers.

Note	The integrity of your backup is severely compromised, and in some cases invalidated, if you perform a backup while OfficeMate and ExamWRITER are open.

   – Reviewed your backup device and media manufacturer's replacement recommendations and ensure that your backup device and media are within their useful product lifecycle.

   – Clearly labeled the backup media that you are using for each day of the week that your office is open for business.

   – Reviewed the HIPAA security and privacy requirements and ensure that your backup procedures are compliant.

   – Determined the location of your SQL database *and* your shared data directory by opening ExamWRITER, clicking **Help**, and selecting **About ExamWRITER**. The server location and name of your SQL database is listed, along with the location of your shared data directory.
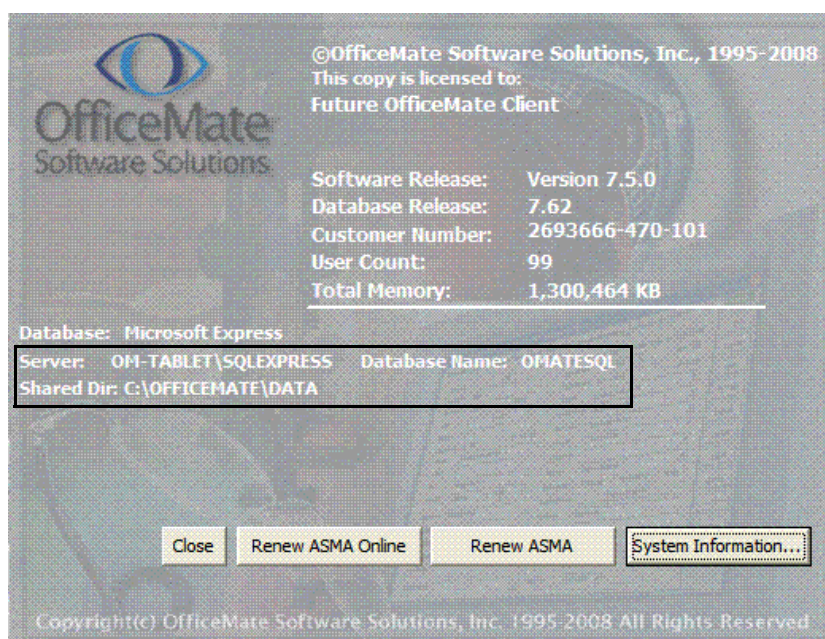
Note	If you are storing eDocuments or electronic claims in a location other than Program Files\OFFICEMATE\DATA, determine the location of your eDocuments and EMC folders.

2　Select a tool to back up your SQL database and shared data directory and ensure that you back up both your SQL database *and* your shared data directory, as determined in step 1 above.

Note	Because you cannot back up your SQL database with a simple copy function; you must use another tool, such as SQL Server 2005 Management Studio Express Edition, to back up your SQL database. You can, however, back up your shared data directory using a simple copy function.

3　Ensure that your backup process was successful.

4　Move the backup media off site everyday and store it in a secure location.

Restoring Database Files

This section tells you how to restore database files, including how

- To restore Access database files, 276

- To restore SQL database files, 276

▶ To restore Access database files

Note	If you need to restore data from a backup, ensure that your staff is properly trained to restore data. If you are not familiar with your restoration procedures, contact your local computer administrator or the manufacturer of your backup media.

❖　Follow the instructions in your backup program to restore your OMATE32 database files to their original location (typically C:\OMATE32) on your computer or server.

▶ To restore SQL database files

Note	If you need to restore data from a backup, ensure that your staff is properly trained to restore data. If you are not familiar with your restoration procedures, contact your local computer administrator or the manufacturer of your backup media.

Follow the instructions in your backup program to restore your SQL database and shared data directory to their original locations (typically C:\Microsoft SQL Server\MSSQL.1\MSSQL\Data and C:\Program Files\OFFICEMATE\DATA) on your computer or server.

CHAPTER 12

Getting Support

In this chapter:

OfficeMate considers our Client Services department the backbone of a successful, positive relationship between our company and you, our client. Our goal is to continually enhance the level of service provided by our Client Services department. OfficeMate Software Solutions offers reasonable annual software maintenance agreement fees and, simultaneously, must establish and enforce our service guidelines in order to keep these fees equitable. This chapter outlines our service guidelines and policies.

Phone Support

OfficeMate Software Solutions offers toll-free client service help from 6:00am to 5:00pm Pacific Time. Dial 800.942.5353 and choose option 1 to reach our Client Services team.

Your calls are answered live by our knowledgeable Client Services team who will assist you with your support issues. OfficeMate's service levels are equal to or better than the best service levels provided by any competitive help desk service in our industry today.

Online Support

To access online help for ExamWRITER, click **Help** on the ExamWRITER main window and select **Help Topics**. The E*xamWRITER Getting Started Guide* help system opens. You can also access online help by pressing the **F1** key anywhere in ExamWRITER.

For more support information on ExamWRITER or any of the OfficeMate Suite products, go to the OfficeMate Software Solutions support Web page at http://www.officemate.net. You can e-mail your support questions to the OfficeMate

Client Services department at Support@OfficeMate.net or
http://www.officemate.net/contact_support.aspx.

OfficeMate Software Solutions also maintains an extensive online knowledge base
that is full of helpful articles and answers to frequently asked questions. We highly
encourage you to seek out answers to your questions and submit new questions using
this knowledge base at http://www.officemate.net/omkb/.

Terms of Support

The Annual Software Maintenance Agreement (ASMA) is a mandatory agreement all
clients must maintain each year through the payment of an annual fee for each
software product licensed from OfficeMate Software Solutions. This ASMA includes
the annual OfficeMate/Report WRITER/ExamWRITER license, all software
upgrades, and toll-free help desk services for our software applications.

The OfficeMate Software Solutions business model requires us to amortize our
annual investment in software application development and client service across our
broad base of clients using OfficeMate Software Solutions' software. By requiring that
everyone invest by paying this low annual fee each year, we can retain lower fees. If
fewer clients participate, the result would be substantially higher fees to amortize these
services across fewer clients.

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