# I N D I V I C A

Eye Form

The Eye Form (EF) is a specialized way to track information for patients. Its design was based on feedback from several ophthalmologists and their offices. This guide will cover the basic functionality of the EF but will not detail other modules (e.g. the Rx3 drug module, EForms, etc.).

1.   Accessing the EF

    1.1.   On the appointment screen, click on EF next to a patient's appointment.
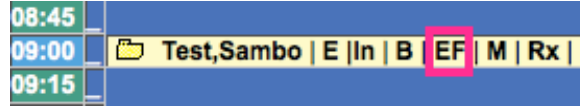
   1.2.   Alternatively, use the Search tool to find a patient. Click on EF next to a patient's name.
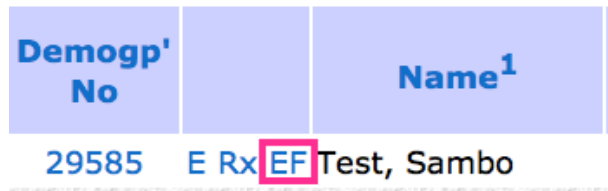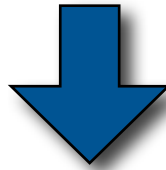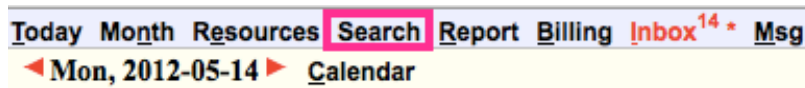
2.   Diagnostics, Past Medical History/Ocular History, Patient Log, and Notes.

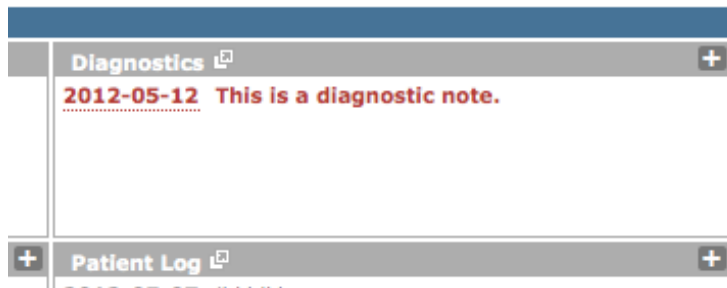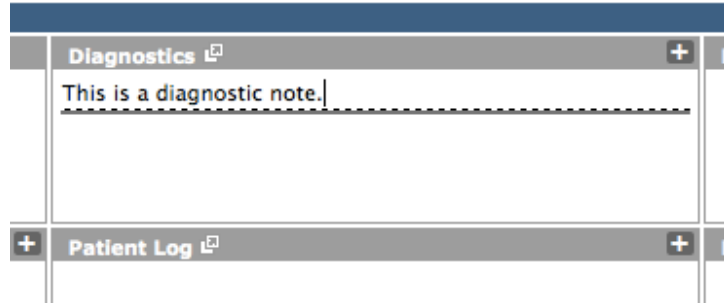   2.1. Adding an Entry

        Diagnostics, Past Medical History/Ocular History, Patient Log, and Notes are all inputted in the same way.

        2.1.1.   Click the plus sign (" + ") next to the header to add an entry. Alternatively, you can click inside the empty field.
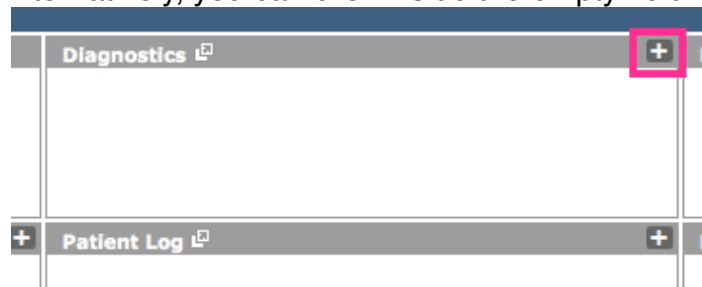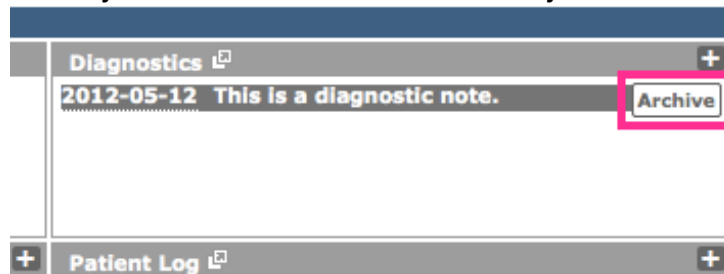
2.1.2. You can now write your note. Hit Return or Enter on your keyboard to commit that note to its respective field. It will turn red to show you that the change has been made this session. The current date will also be assigned to it.

Diagnostics
This is a diagnostic note.

Patient Log

Diagnostics
2012-05-12 This is a diagnostic note.

Patient Log

2.2. Archiving an Entry
Once an entry is made, it can be hidden by archiving it.

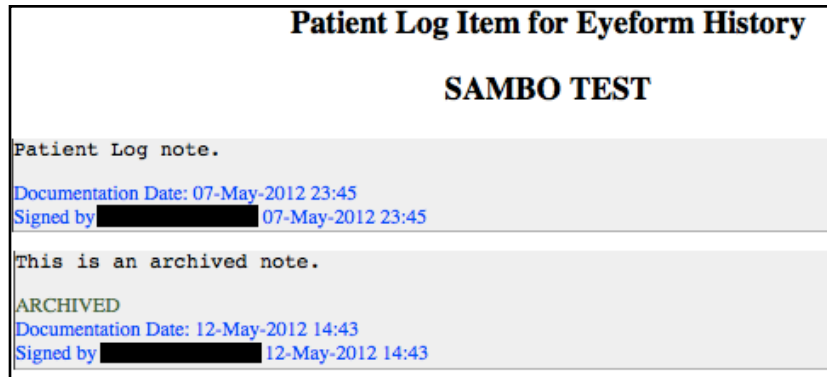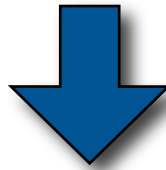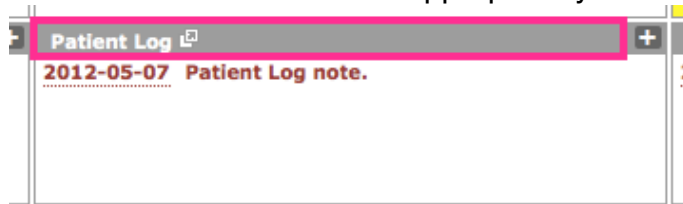2.2.1. Move your mouse cursor over an entry. The Archive button appears.

Diagnostics
2012-05-12 This is a diagnostic note.   Archive

Patient Log

2.2.2. Clicking it will remove it from its respective field. It will be stored in the history of that particular field.

INDIVICA

2.3. Accessing Archived Entries / Entry History

2.3.1. Click on the header of the field of the history you wish to view. A window appears, displaying all entries in chronological order. Archived entries are labelled appropriately.

Patient Log Item for Eyeform History

SAMBO TEST

Patient Log note.

Documentation Date: 07-May-2012 23:45
Signed by ████████████ 07-May-2012 23:45

This is an archived note.

ARCHIVED
Documentation Date: 12-May-2012 14:43
Signed by ████████████ 12-May-2012 14:43

3. Medications and Drops

3.1. Accessing Medications or Drops

3.1.1. A list of all previous medications and drugs appears in the Medications and Drops field. Scroll through to see all entries.

3.1.2. For details on all drugs, click on the header. The Rx3 module appears in a new window.
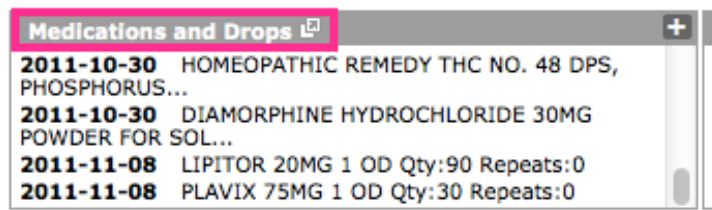
I N D I V I C A

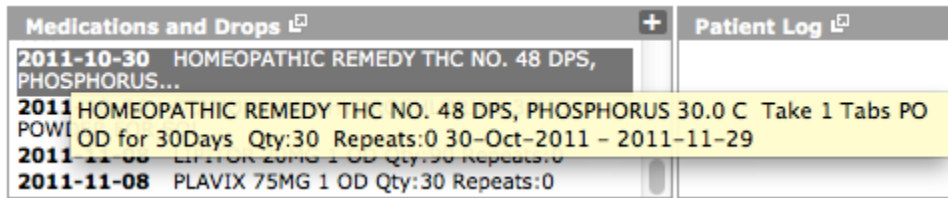3.1.3. You may hover your cursor over an entry to view more details. Note: To hover, place your mouse cursor over an item then leave it still momentarily without clicking.

3.2. Adding Medications or Drops
3.2.1. Click the Medications and Drops header. The Rx3 module appears in a new window
3.2.2. You may search for your medication or drop and fill in the information appropriately.
3.3. The Rx3 module can also be accessed by clicking the Rx3 button on the EF.

4. Impressions and Plans
4.3. Adding New Impression Notes
4.3.1. Click in the Impressions field. Type in your notes.

4.3.2. When you're done, click either Save or Sign, Save & Exit (see Section 11.3-4).

4.4. Adding Quick Impressions
4.4.1. Clicking Copy Last Impression will input the exact text as the last saved impression.
4.4.2. Clicking No Change will insert the text: "Patient's condition has not changed.".
4.4.3. Clicking Stable will insert the text: "Patient's condition is stable."

4.5. Impression History
4.5.1. Impressions that were entered and signed (see Section 11.3), will appear in the Impression History field. Impressions cannot be directly

entered into this field. Impressions are marked with the date that it was signed on.

4.6. Adding New Plan Notes

4.6.1. Click in the Plans field. Type in your notes.

Plan

This is a plan note.

*Sign, Save & Exit: all users with the **receptionist** role will receive this message as a tickler.*

4.6.2. When you're done, click either Save or Sign, Save & Exit (see Section 11.3-4).

4.6.3. When plans are saved through Sign, Save & Exit, a tickler (see Section 9) is created for all providers that have the role "receptionist".

4.7. Previous Plans

4.7.1. Plans that were entered and signed (see Section 11.3), will appear in the Previous Plans field. Plans cannot be directly entered into this field. Plans are marked with the date that it was signed on.

5. Measurements

5.1. Adding New Measurements

5.1.1. Click Modify. A new window appears.
Note: This new window can be moved by clicking and dragging it by the dark-grey header. The new position will be remembered until the end of the session.

Measurements   Modify Previous Next

Impression

5.1.2. Click on the appropriate heading to see its respective fields.

Measurements   x

AR Sph ⇕   **Graph**

Vision Pretest:

Vision Manifest: [copy AR]   [copy Specs]

IOP:

Special Exam: [normal] [clear]

EOM/Stereo: [normal] [clear]

Alignment:

Anterior Segment: [normal] [clear]

Posterior Segment: [normal] [clear]

External: [normal] [clear]

Lacrimal System Assessment (NLD): [normal] [clear]

Eyelid Measurements:

Orbit:

Neuroimaging:

5.1.3.   When you are done entering values, click the X to close the window.
Note: Grey fields have not been changed. When a field is selected and/or modified, it will turn white.
This setting can be disabled; please contact us at support@indivica.com

Measurements   ☒

AR Sph ⇕   **Graph**

Vision Pretest:

	OD				OS		
Sph	Cyl	Axis		Sph	Cyl	Axis
1	2	3	AR			
K1	K2	K2-Axis		K1	K2	K2-Axis
			K			
sc	cc	ph		sc	cc	ph
20/	20/	20/	Distance	20/	20/	20/
20/	20/		Near	20/	20/	

5.2. Previous Measurements

5.2.1.   Previous Measurements appear in the EF under Measurements.

Measurements   Modify Previous Next

2012-05-12   **AR**
OD 1 2 3
OS ... ...
+ 23 more

5.2.2.   Click an entry to view it. Entries opened this way cannot be modified.
5.2.3.   To record new measurements, see Section 3.1.

6.   Specs History
6.1.   Adding Entries
6.1.1.   Click on the plus sign (" + ") next to the header to add an entry. A window appears.

6.1.2.   If the prompt is opened in error, you can click the X to close the window.
6.1.3.   Specs History be dated manually by clicking on the calendar icon.
6.1.4.   When you are done, click Save.

6.2.   Editing Entries
6.2.1.   Previous entries are located below its respective header.
6.2.2.   Click on an individual entry. A new prompt appears.

6.2.3.   When you are done making your edits, click Save.

7.   Procedures

7.1. Adding Entries

7.1.1.   Click the plus sign (" + ") next to the header to add an entry. A new window appears.

7.1.2. If the prompt is opened in error, you can click the X to close the window.

7.1.3. Procedures can be dated manually by clicking on the calendar icon.

7.1.4. May choose "Other..." as the Doctor. This will allow you to manually enter a doctor not from your clinic.

7.1.5. When you are done, click Save.

7.2. Editing Entries

7.2.1. Previous entries are located below its respective header.

7.2.2. Click on an individual entry. A new prompt appears.

7.2.3. When you are done making your edits, click Save.
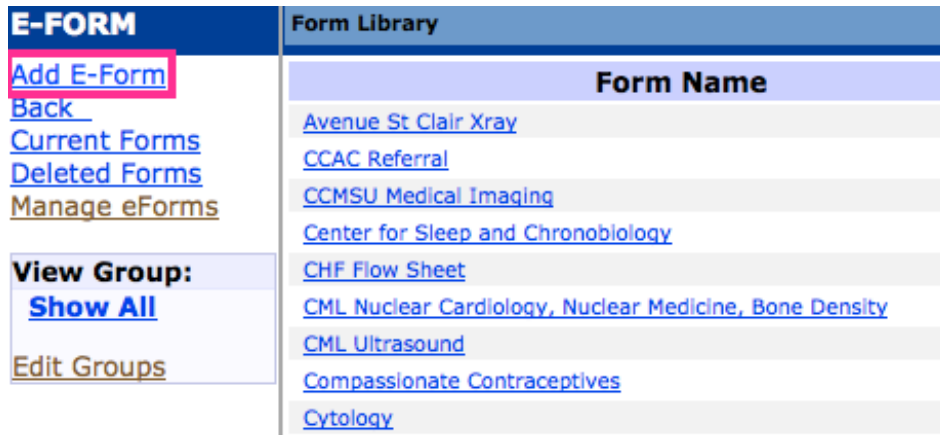
8. Diagrams/EForms

8.1. Adding New Diagrams/EForms

8.1.1. Click the plus sign (" + "). A new menu appears with commonly used EForms.

INDIVICA

8.1.2. Click the name of the Diagram or EForm to be used.

8.1.3. For a full list of Diagrams and EForms, click on the Diagrams/EForms header.

8.1.4. A new window appears. Click Add E-Form.

8.1.5. Click on the Diagram or EForm you wish to use.

8.2. Modifying Diagrams/EForms

8.2.1. The EF shows a list of recently saved Diagrams/EForms beneath its respective header. For a full list of saved Diagrams/EForms, click the header.

8.2.2. Click the Diagram/EForm you wish to view.
Note: When changes are saved, a new Diagram/Eform will be created for the patient. The previous version will remain.

8.2.3. To delete an Diagram/EForm, click Delete in the action column.
Note: Deleted Diagrams/EForms can be accessed by choosing Deleted Forms in the left hand column.

Form Name	Additional Information	Form Date	Action
Chronic Pain PCCC		2011-07-03 17:51	Delete
Public Health, General		2011-05-11 07:38	Delete
Rich Text Letter		2011-02-09 14:53	Delete
Rich Text Letter	letterhead.rtl	2011-02-09 14:46	Delete
ODB- Trillium Application		2011-02-07 14:56	Delete

9. **Documents and Lab Results**
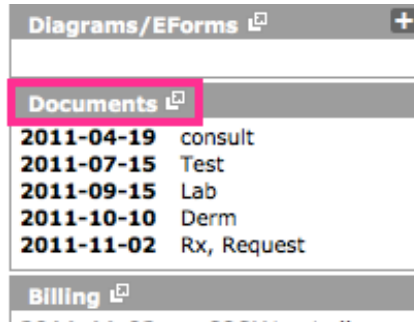Documents are scanned documents that are attached to a patient's record.

9.1. Viewing Documents

9.1.1.   A list of recent documents is shown on the EF under Documents. To view a complete list, click on the header.

9.1.2.   To view any document, click on the document's description.
Note: The file will download to your computer.

9.2. Modifying Documents
9.2.1.   Click on the Documents header.
9.2.2.   Click the icons to the right of a document to modify it.

Note: The icons from left to right are: Delete, Edit, Annotation, Tickler.
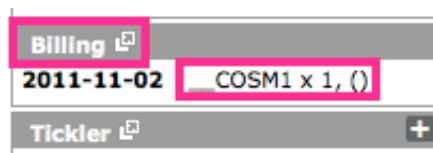
9.3. Viewing Labs
9.3.1. A list of recent labs are displayed below the Lab Results header. To view a complete list, click the Lab Results header.

10. Billing
10.1. Billing History
10.1.1.   A list of recently billed service codes appear below Billing.
10.1.2.   To view all entries, click the header or a single entry.

10.2. Creating New Invoices
10.2.1.   Click Bill at the bottom of the EF.

10.2.2.   This will Sign, Save & Exit and then open the billing form from which you can bill for the appropriate codes.
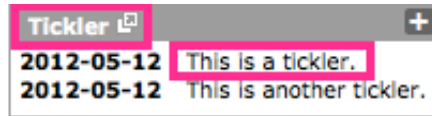## 11. Tickler
11.3. Viewing Ticklers

INDIVICA

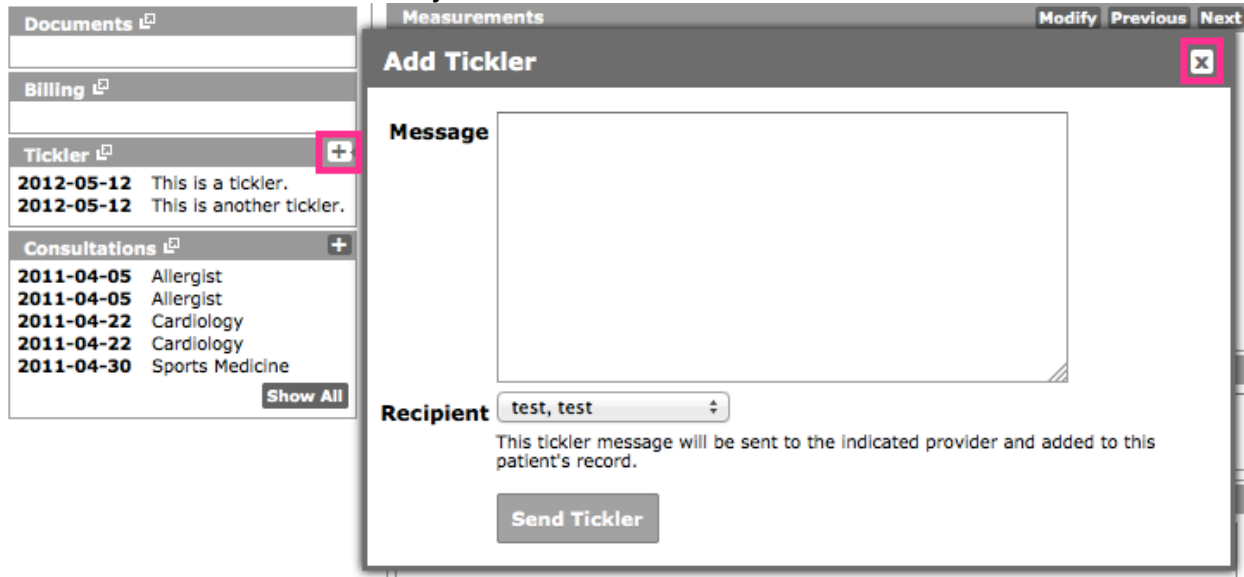11.3.3. A list of active ticklers is displayed on the EF. To view a complete list, click the header.

11.3.4. To view details about a specific tickler, click it.

11.4. Creating New Ticklers

11.4.1. Click the plus sign (" + ") to begin creating a new tickler about this patient.
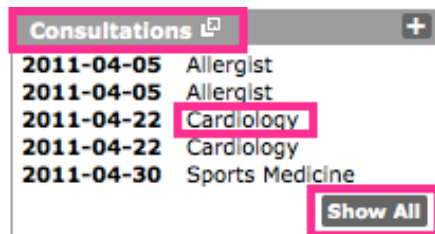Note: Priority will be set to normal.

11.4.2. If this is done in error, click the X to close the prompt.

12. Consultations

12.1. Viewing Consultations

12.1.1. A list of recent consultations appears on the EF under Consultations. To view a complete list, click the header. Alternatively, you can click the Show All button.

12.1.2. To view details about a specific consultation, click the consultation.

12.2. Creating New Consultations

12.2.1. Click the plus sign (" + "). A new window will appear. Fill out this form as appropriate.

13. Print

13.1. Print will begin the process to generate a consultation letter.

13.2. Click Print and a new window appears. You may modify the Letterhead and/ or add Additional Notes (optional).

13.3. Letters are saved to a patient's chart under Documents by default. If you do not wish to save the letter to the patient's chart, uncheck the appropriate box.

13.4. Once you have made your changes, click Print. A PDF will be downloaded.

14. Save and Exit

14.1. Clicking Save and Exit will save all changes made to the EF in that session. The next time the EF is opened, these changes will appear.
Note: This is most helpful for technicians who initially see a patient and then send them to another doctor or technician to finish the encounter.

15. Sign, Save & Exit and Sign, Save & Bill

15.1. At the end of an encounter, click Sign, Save & Exit or Sign, Save & Bill. This finalizes all changes and notes.

15.2. Sign, Save & Exit closes the EF for that patient. Sign, Save & Bill will open a blank invoice for that patient.
Note: A blank invoice for a patient can also be created by clicking on the B in the top right of the EF.

15.3. Clicking Save will save all the changes you have made to the session. The next time the EF is opened, these changes will appear.

15.4. Sign, Save & Exit will save all current changes to the EF, date and time them appropriately, and mark which provider committed the change. It will then close the EF. If a plan has been entered, a tickler will be created for all providers marked as receptionist with the same message.

16. Highlight and Previous EF Versions

16.1. Highlight is a slider. Any notes that were created/dated within the time-frame shown will be highlighted in yellow.
Note: Procedures and Specs History can be dated manually and will be highlighted based on this information. Other fields will be highlighted based on their creation date. Modifying a note in the past will not change its creation date.
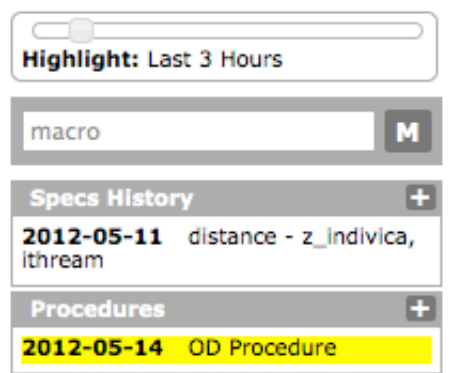
16.2. Clicking Today at the top will display a menu populated with dates of all previous revisions of the EF. Clicking any date will display all information as of the date selected. Select Today to see the most current version.
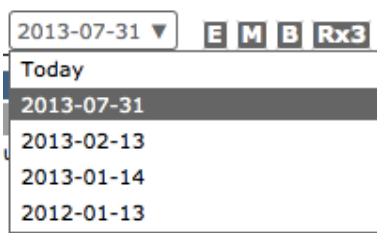
17. Macros

17.1. Using Macros

17.1.1. Begin typing the name of the macro you wish to use in the macro field. Suggestions will appear as you type. Click the macro to be used.
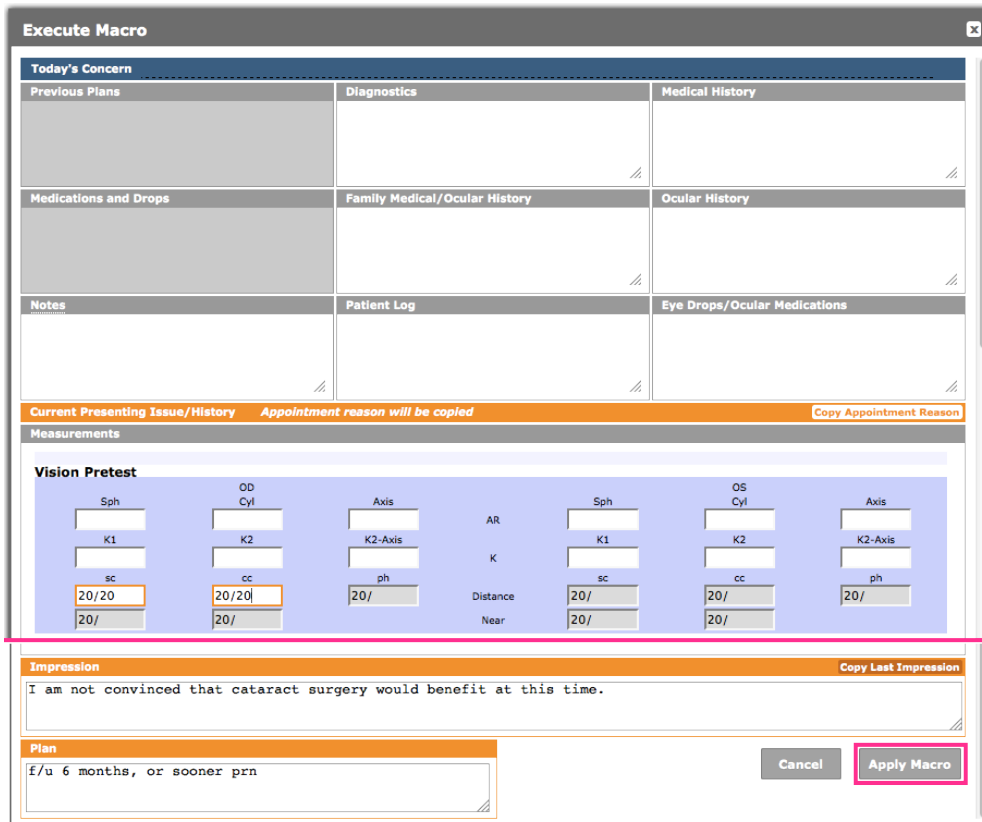Note: Hitting enter will select the top-most suggestion.

17.1.2. You may also click a Macro from the list below the macro field. This list shows the first 10 macros alphabetically. If there are more than 10, you may click Show All to display all macros.

17.1.3. When a macro is selected, a confirmation prompt appears. Fields to be modified will be highlighted in orange.
Note: Changes can be made at this point. This does not modify the macro but what will be executed in this instance.

17.1.4. When you are done, click Apply Macro. Your changes will be made to the EF.
To cancel using a macro, click the X in the top right.

17.2. Creating New Macros
17.2.1. Click the M. A new window appears.
17.2.2. Type in a unique macro name.
Note: When naming macros, keep in mind that macros are arranged by their names alphabetically on the EF. They may also be called by typing the start of the name on the EF.
17.2.3. Fill in any other fields you wish to populate when you use the macro.
Note: You can click "Copy Appointment Reason" or "Copy Last Impression" to quickly insert the appointment reason or last impression note respectively.
17.2.4. Click Save Macro. The macro will appear in the list to the left.

17.3. Modifying Existing Macros
17.3.1. Click the M. A new window appears.
17.3.2. Click an existing macro. The macro fields will be populated by the macro's information.
17.3.3. Edit the information appropriately.
Note: You may change the name and the macro's name will be modified appropriately.
17.3.4. You may click Clear and all macro fields will be emptied.

18. General Patient Information
18.1. The EChart can be accessed by clicking the E on the EF
18.2. The patient's master demographic file can be accessed by clicking the M on the EF.