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# ExamWRITER 7.0/7.1/7.2/7.3 Enhancements

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OfficeMate Software Solutions announces the newest version of ExamWRITER! In addition to resolving several known issues in previous versions of ExamWRITER, this updated version improves upon ExamWRITER's current robust attributes and offers useful new features and expanded functionality. For additional information on ExamWRITER features, training, and integration with OfficeMate, contact OfficeMate Software Solutions at [www.officemate.net](http://www.officemate.net) or 800.942.5353.

### Notes

- ExamWRITER 7.x requires the following system specifications:
  - Windows® XP Professional or Windows® 2000 Professional for workstations
  - 1024 x 768 monitor and video adapter screen resolution

For a complete list of system specifications, go to

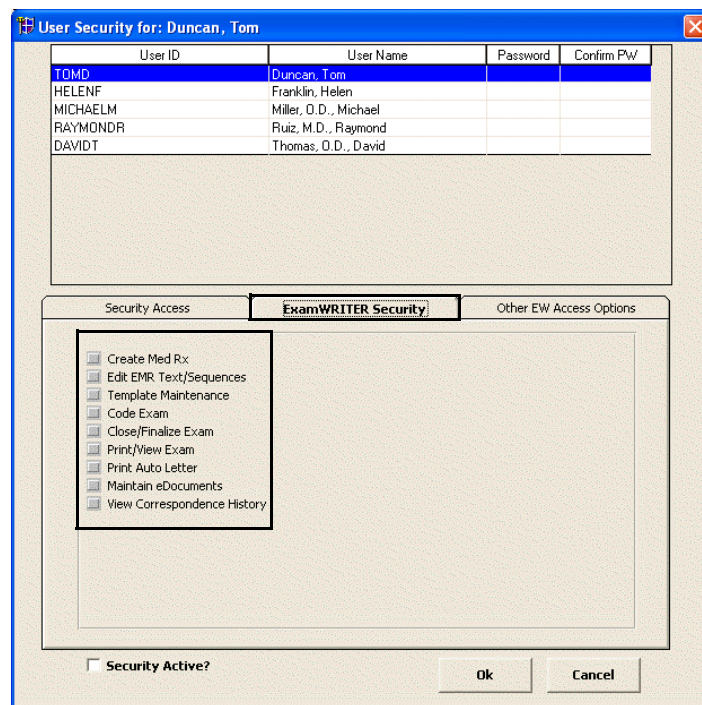
[http://www.officemate.net/PDFs/System Specifications.pdf](http://www.officemate.net/PDFs/System%20Specifications.pdf).

- If you are upgrading from ExamWRITER 5.x to 7.x, ensure that you have read the ExamWRITER 5.1 and 6.4 Enhancement documents located at [www.officemate.net/support\\_ex\\_resources.aspx](http://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.

## User Security

The redesigned User Security window contains the following new features:

- Ability to assign access privileges for the following tasks:
  - Editing exam text and auto letter sequences
  - Coding exams
  - Closing and finalizing exams
  - Printing and viewing exams
  - Printing auto letters
  - Maintaining eDocuments
  - Viewing correspondence history



- Ability to assign full, read only, and no access privileges to specific exam categories.
- Ability to assign full, read only, and no access privileges to patient demographic maintenance in the standalone version of ExamWRITER.

**User Security for: Duncan, Tom**

User ID	User Name	Password	Confirm PW
TOMD	Duncan, Tom		
HELENF	Franklin, Helen		
MICHAELM	Miller, O.D., Michael		
RAYMONDR	Ruiz, M.D., Raymond		
DAVIDT	Thomas, O.D., David		

Security Access	ExamWRITER Security	Other EW Access Options
<b>Exam Category Access</b>		
	Full Access	Read ONLY
Reason for Visit	<input checked="" type="radio"/>	<input type="radio"/>
Chief Complaint	<input checked="" type="radio"/>	<input type="radio"/>
Patient History	<input checked="" type="radio"/>	<input type="radio"/>
Review of Systems	<input checked="" type="radio"/>	<input type="radio"/>
Vision	<input checked="" type="radio"/>	<input type="radio"/>
Examination / Eye Health Tests	<input checked="" type="radio"/>	<input type="radio"/>
Ocular Surgery	<input checked="" type="radio"/>	<input type="radio"/>
Impressions	<input checked="" type="radio"/>	<input type="radio"/>
Assessment / Plan	<input checked="" type="radio"/>	<input type="radio"/>
Patient Management	<input checked="" type="radio"/>	<input type="radio"/>
<b>Other Options</b>		
Patient Demographic Maintenance	<input checked="" type="radio"/>	<input type="radio"/>

Security Active?

Ok Cancel

## Patient Information Center

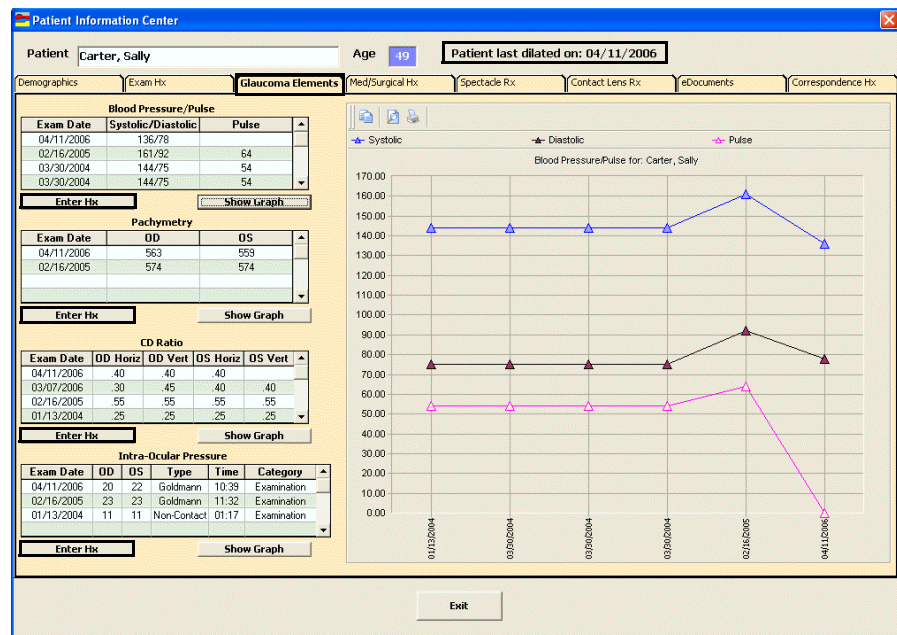
The improved Patient Information Center contains the following new features:

- Ability to view the date the patient was last dilated.
- Ability to record historical blood pressure, pulse, pachymetry, CD ratio, and IOP values under the Glaucoma Elements tab.

To record historical Glaucoma elements, click the **Enter Hx** buttons.

### Note

You cannot record observations for blood pressure, pulse, pachymetry, CD ratio, and IOP 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.



- Ability to delete blood pressure, pulse, pachymetry, CD ratio, and IOP values under the Glaucoma Elements tab.

To delete Glaucoma elements, right-click on an element and click **Yes**.

### Note

If you delete historical Glaucoma elements from the Patient Information Center, they will also be deleted in finalized exams.

- Ability to copy the Glaucoma element graph displayed to the clipboard and paste it into another document, preview the printed version of the graph, and print the graph using the three icons above the graph.
- Ability to right-click on a Current Therapeutic Rx and refill it under the Med/Surgical Hx tab.
- Ability to modify the Sig and Quantity of a prescription when you refill it through the Med/Surgical Hx tab.



- Ability to quickly distinguish discontinued medications and medications to which the patient is allergic under the Med/Surgical Hx tab.
- Ability to mark or unmark medications as being discontinued under the Med/Surgical Hx tab.

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**.

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 [Patient History on page 24](#).

Patient Information Center

Patient: Carter, Sally Age: 49

Demographics Exam Hx Glaucoma Elements **Med/Surgical Hx** Spectacle Rx Contact Lens Rx eDocuments Correspondence Hx

**Medication History**

Medication	Notes	Disc.	Allergic
ACETAMINOPHEN		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ALDOMET		<input checked="" type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Refill

**Current Therapeutic Rx**

Medication	Qty	Dosage	Freq	Apply	Duration	Duration	Action	Spec. Instr.
Advil, 400mg	One (1)	one tablet	q8h	orally			Called Pharmacy	

**Medical Hx**

Condition	Timeline	Disc.
Allergic Disorders	2001	<input type="checkbox"/>
DISCONTINUE		<input type="checkbox"/>
Remove DISCONTINUE		<input type="checkbox"/>

**Surgical Hx**

Condition	Timeline	Disc.
		<input type="checkbox"/>

**Ocular Hx**

Condition	Timeline	Disc.
		<input type="checkbox"/>

**Ocular Surgical Hx**

Condition	Timeline	Disc.
		<input type="checkbox"/>

Exit

- Ability to view spectacle lab order numbers and create lab orders for final and alternate prescriptions under the Spectacle Rx tab. You can only create lab orders under this tab for finalized exams (if one has not already been created).

To create a lab order for a finalized exam, find a patient with a finalized exam, click the **Patient Hx** icon on the ExamWRITER Control Center, (do not click the Patient Hx icon from within an 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.

The screenshot shows the 'Patient Information Center' window for a patient named 'Carter, Sally' with an age of 49. The 'Spectacle Rx' tab is active, and the 'Select Rx type' dropdown is set to 'Final'. A table displays prescription data with columns for Date, #, Usage, OD (Sph, Cyl, Axis, HPrism, VPrism, Add, DVA, NVA), OS (Sph, Cyl, Axis, HPrism, VPrism, Add, DVA, NVA), and Lab Ord. A 'Create Lab Order' button is overlaid on the row for the prescription dated 01/13/2004.

		OD								OS									
Date	#	Usage	Sph	Cyl	Axis	HPrism	VPrism	Add	DVA	NVA	Sph	Cyl	Axis	HPrism	VPrism	Add	DVA	NVA	Lab Ord
02/03/2006	1		-2.75	-3.00	077			+3.00	20/50	20/40+	-3.00	-3.00	077			+3.00	20/60	20/40	0
03/31/2004	1		-1.25	-1.25	070						-1.25	-1.25	070			+1.25			33
01/13/2004	1		-2.50	-3.75	085			2.50	20/40	20/40	-1.25	-1.50	094			2.50	20/40	20/40	0
01/07/2004	1		-1.25	-2.00	085			2.50	20/20	20/20	-1.25	-1.50	094			2.50	20/20	20/20	6829

- Ability to view contact lens lab order numbers and create lab orders for final and trial prescriptions under the Contact Lens Rx tab. You can only create lab orders under this tab for finalized exams (if one has not already been created).

To create a lab order for a finalized exam, find a patient with a finalized exam, click the **Patient Hx** icon on the ExamWRITER Control Center, (do not click the Patient Hx icon from within an 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.

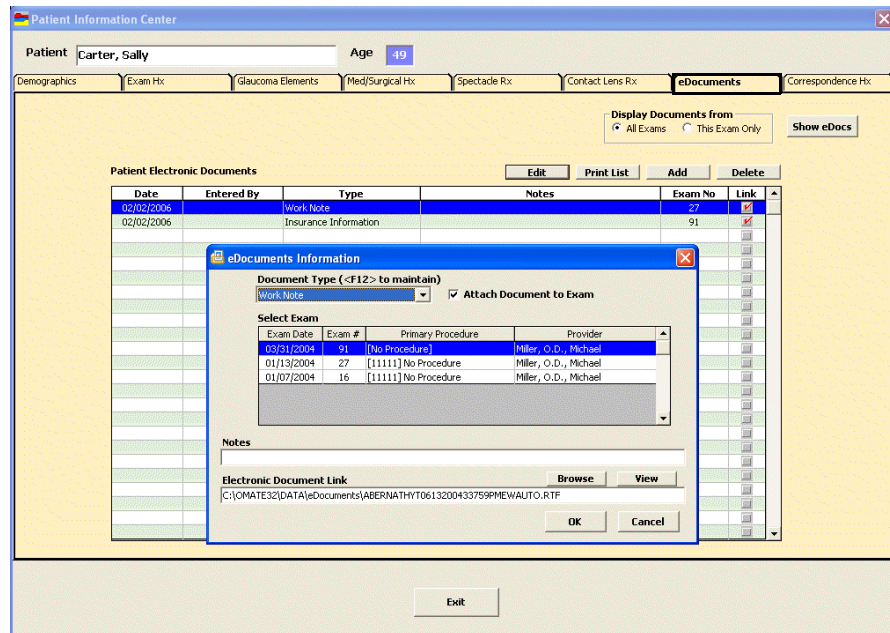
The screenshot shows the 'Patient Information Center' window for a patient named Sally Carter, age 49, with a last dilated exam on 03/07/2006. The 'Contact Lens Rx' tab is active, displaying a table of prescriptions for both the right eye (OD) and left eye (OS). The table includes columns for Brand, Sph, Cyl, Axis, Add, BC, Dia, DVA, NVA, Tint, and Soft/Rigid lens types. A 'Create Lab Order' button is highlighted over one of the rows in the table. Below the table is an 'Exit' button.

OD													OS												
Brand	Sph	Cyl	Axis	Add	BC	Dia	DVA	NVA	Tint	Brand	Sph	Cyl	Axis	Add	BC	Dia	DVA	NVA	Tint	Soft Rx	Rigid Rx				
Acuvue	-6.00				8.80	14.00			Clear	Acuvue	-6.00				8.80	14.00			Clear	0	0				
Acuvue	-5.75				8.80	14.00			Clear	Acuvue	-5.75				8.80	14.00			Clear	0	0				
Acuvue	-4.75	-4.75	084	+4.75	8.80	14.00	20/50 +	20/30	Clear	Acuvue	-4.75	-4.75	084	+4.75	8.80	14.00	20/50 +	20/30	Clear	0	1				
Acuvue	-6.00				8.80	14.00			Clear	Acuvue	-6.00				8.80	14.00			Clear	0	0				
Acuvue	-5.75				8.80	14.00			Clear	Acuvue	-5.75				8.80	14.00			Clear	0	0				
Acuvue	-4.75	-4.75	084	+4.75	8.80	14.00	20/50 +	20/30	Clear	Acuvue	-4.75	-4.75	084	+4.75	8.80	14.00	20/50 +	20/30	Clear	0	0				
OCULAR SCIEF	-2.50	-3.75	085	2.50	8.6	14.4	20/40	20/40	Handlin	OCULAR SCIEF	-1.25	-1.50	094	2.50	9.0	14.5	20/40	20/40	Handlin	0	0				
OCULAR SCIEF	-0.75	-2.00	085		8.6	14.4	20/20	20/20	Handlin	OCULAR SCIEF	-0.25	-1.50	094		9.0	14.5	20/20	20/20	Handlin	0	0				
OCULAR SCIEF	-0.75	-2.00	085		8.6	14.4	20/20	20/20	Handlin	OCULAR SCIEF	-0.25	-1.50	094		9.0	14.5	20/20	20/20	Handlin	2191	0				
	+0.50										+1.00									0	0				
OCULAR SCIEF	-0.75	-2.00	085				20/20	20/20	Handlin	OCULAR SCIEF	-0.25	-1.50	094				20/20	20/20	Handlin	0	0				



- Ability to attach electronic documents to specific exam records.

To attach an electronic document to a specific exam record, click the **eDocuments** tab in the Patient Information Center and click **Add** or click the **Images, Drawing and Graphic** category bar on the ExamWRITER chart window and click **New**. Select a document type and exam, select the **Attach Document to Exam** check box (if desired), type notes in the **Notes** text box (if desired), click **Browse** to select a document, and click **OK**.



- Ability to open and edit electronic documents attached to exams from the Patient Information Center and the ExamWRITER chart window.

To open and edit electronic documents that are attached to exams, click the **eDocuments** tab in the Patient Information Center and double-click on a document in the **Patient Electronic Documents** table or click the **Images, Drawing and Graphic** category bar on the ExamWRITER chart window and double-click on a document.

## Vision/Rx

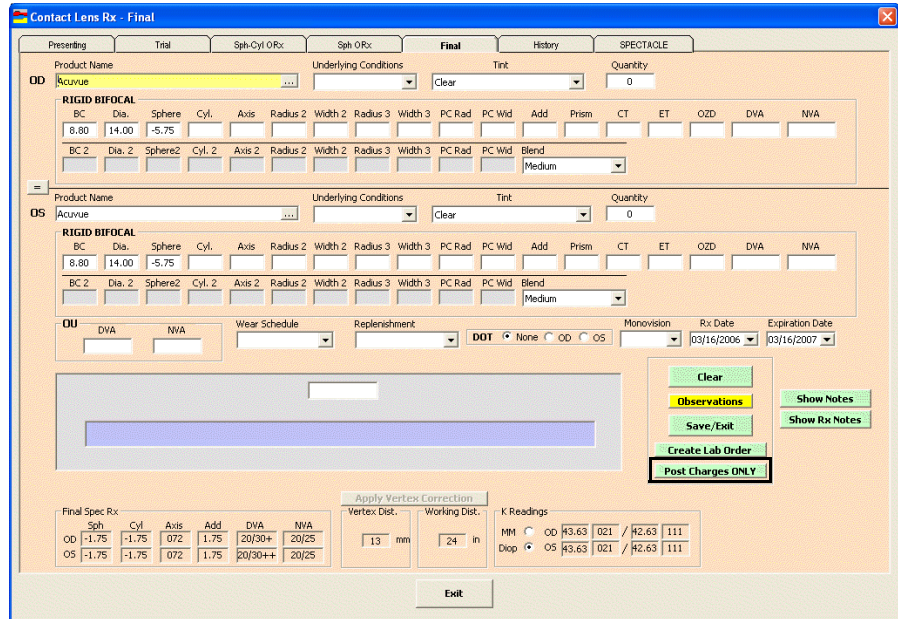
The improved Vision/Rx tab contains the following new features:

- Ability to post charges for final soft and rigid contact lenses and final and alternate spectacles to a fee slip in OfficeMate without creating a lab order.

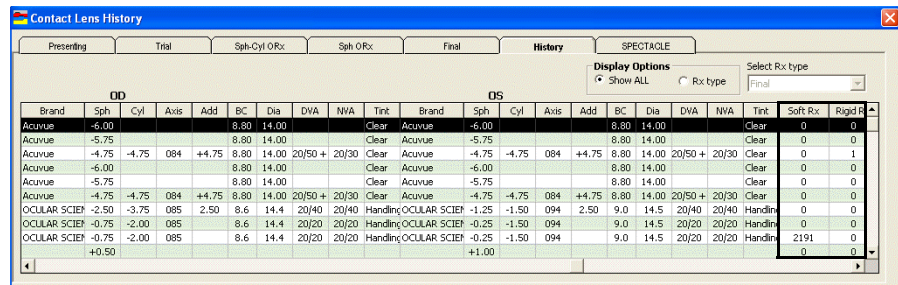
To post charges without creating a lab order, record an Rx and click **Post Charges ONLY**. The Rx charges are transferred to an OfficeMate fee slip where they are automatically priced. This feature is good to use for non-inventory items.

### Note

In order to view the Post Charges ONLY button and post charges without creating a lab order, you must have selected the **Yes** radio buttons for the OfficeMate Interface options preferences. For more information on these preferences, go to [Preferences on page 32](#).



- Ability to view previous contact lens orders in the Contact Lens History window.

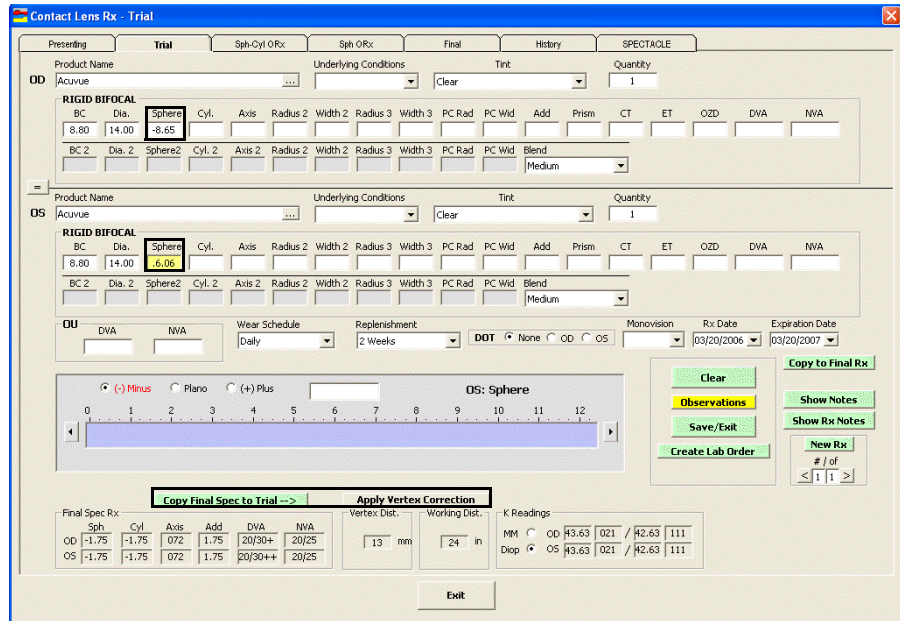


- Ability to automatically apply vertex corrections to trial contact lens prescriptions.

To automatically apply a vertex correction to a trial contact lens prescription, record and save a final spectacle Rx and then copy it to the trial contact lens Rx. Click the **Vertex Correction** button and the sphere and cylinder fields will automatically be corrected if they are at or above +/- 4 diopters.

**Notes**

- Before you apply a vertex correction to a trial contact lens Rx, record the vertex distance.
- Vertex corrected measurements are not rounded; therefore, you must manually round the corrected measurements in the Contact Lens Rx - Trial window.



- Completely redesigned and improved Contact Lens Rx window that includes locations for recording the following information:
  - Tints
  - DOT (rigid lenses only)
  - Blends (rigid lenses only)
  - Seg Ht
  - Multiple base curves
  - Trial and final contact lens wear schedules
  - Trial and final contact lens replenishment schedules
  - Trial and final contact lens quantities
  - Bitoric, bifocal, and sphere rigid lenses

**Notes**

- 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, multi-focal 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.
- 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.



- Ability to view the following information in the redesigned Contact Lens Rx window:
  - Final spectacle Rx
  - K Readings
  - Vertex distance
  - Working distance
  - Tints

The screenshot shows the 'Contact Lens Rx - Presenting' window. It features a 'Presenting' tab and a 'SPECTACLE' tab. The 'OD' (Right Eye) section is for a 'RIGID BIFOCAL' lens. The 'OS' (Left Eye) section is also for a 'RIGID BIFOCAL' lens. The 'OU' (Both Eyes) section shows 'DVA' as '20/40+' and 'NVA' as '20/50+'. The 'Final Spec Rx' section at the bottom provides a summary of the prescription, including Sph, Cyl, Axis, Add, DVA, NVA, Vertex Dist. (13 mm), Working Dist. (24 in), and K Readings for both eyes.

- Ability to automatically transfer BC, Dia, Sph, Cyl, and Axis measurements from the Contact Lens Rx window to the Select Contact Lens window to more quickly find appropriate contact lenses for patient prescriptions.

To more quickly find and select contact lenses, record BC, Dia, Sph, Cyl, or Axis measurements in the Contact Lens Rx window, click the ellipse (...) next to the OD or OS **Product Name** box, highlight a product name in the top part of the window, click **Search** to search for a specific product with the measurements



you recorded, and double-click on the appropriate product details line in the bottom part of the window to select the contact lens.

### 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.

Product Name	Fee Slip Description	Lens Category	Tint
Acuvue	Multipack Acuvue Lenses	Hard MF	Aqua #1
Acuvue Gas Perm	Rigid Contact Lenses	Hard SV	Clear
Rigid Bitoric		Rigid Bitoric	Clear
Surevue	Multipack Surevue Lenses	Soft Sphere Disposable	Clear

BC	Dia	Sph	Cyl	Axis
8.8	14	-5.5		

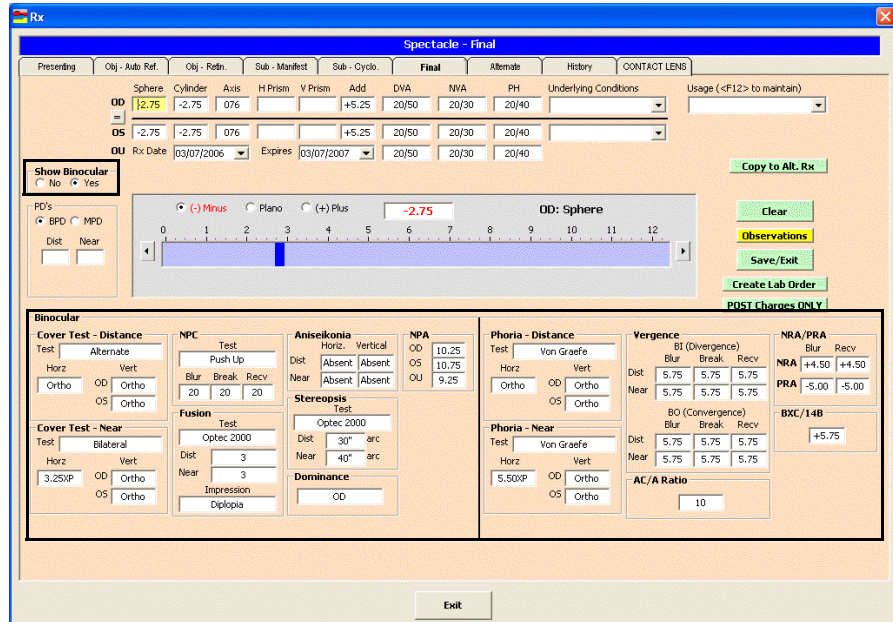
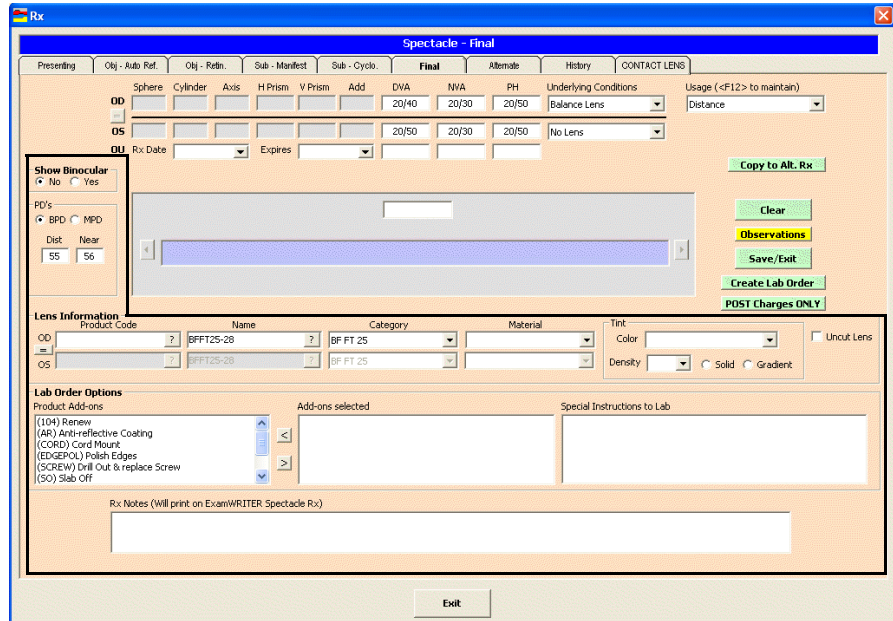
  

BC	Dia	Sph	Cyl	Axis	Add	Color	Product Code	OnHand	Discontinued
8.80	14.00	-5.75					733905100451		
8.80	14.00	-5.50					733905100437	-4	
8.80	14.00	-5.25					733905100413		

Items found = 3

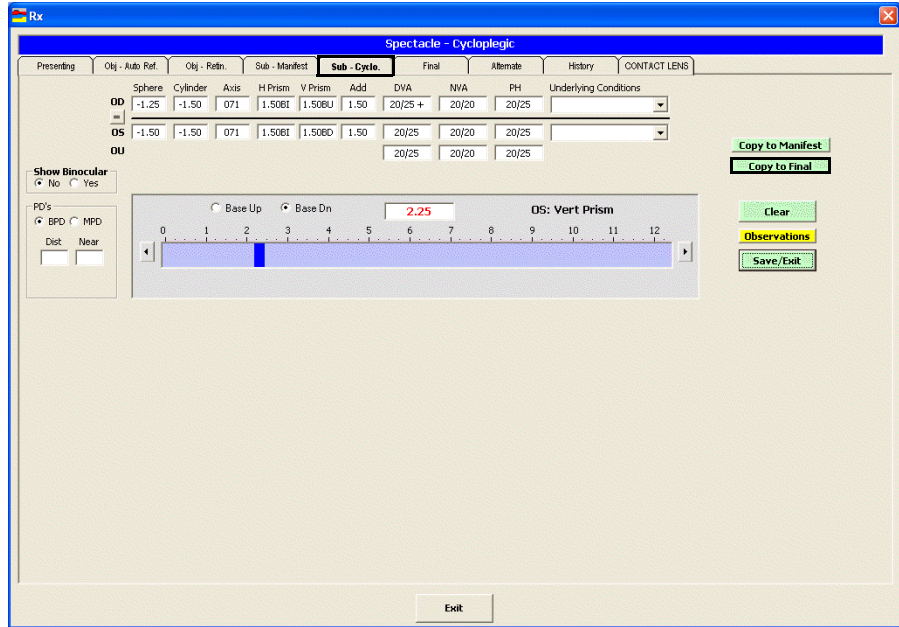
- Completely redesigned and improved Spectacle Rx window that includes locations for recording the following information:
  - PDs
  - Final and alternate Rx lens product information
  - Final and alternate Rx lab order options, including add-ons and special lab instructions
 Lab order options selected in the Spectacle Rx window are transferred to OfficeMate to enhance communication between the doctor and technical staff.

- Final and alternate Rx notes  
Rx notes recorded in the Spectacle Rx window will print on the ExamWRITER Rx.
- Binocular information
- Subjective manifest Rx binocular information
- Subjective cycloplegic Rx binocular information

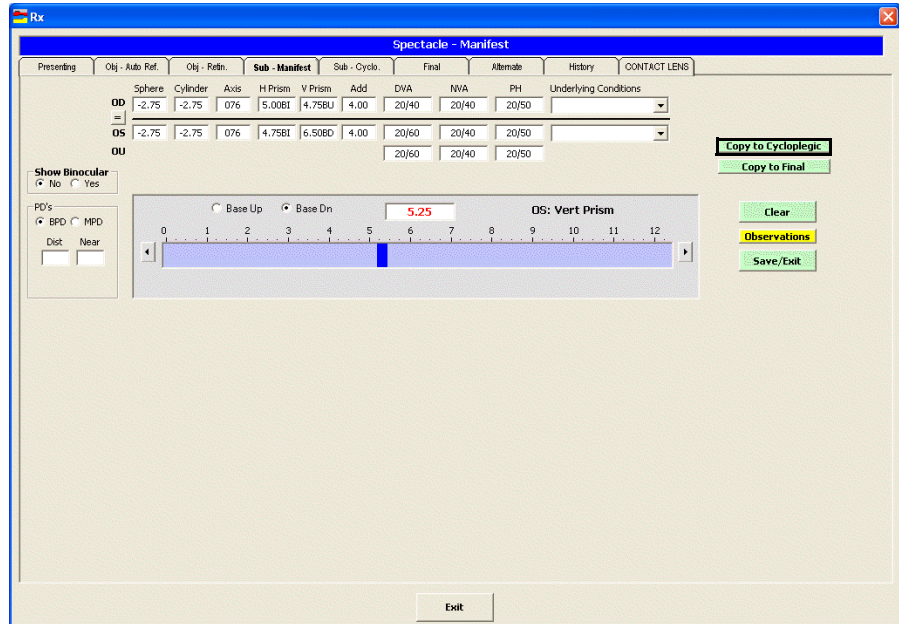




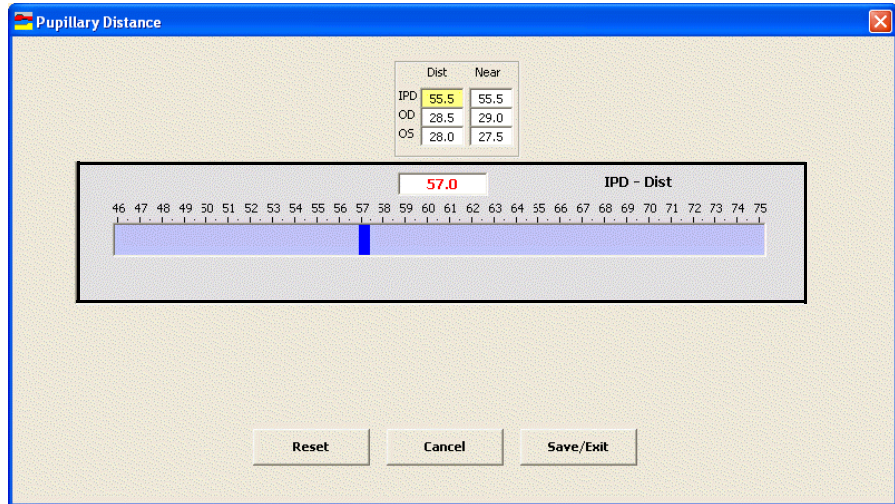
- Ability to copy subjective spectacle cycloplegic prescriptions to final prescriptions.



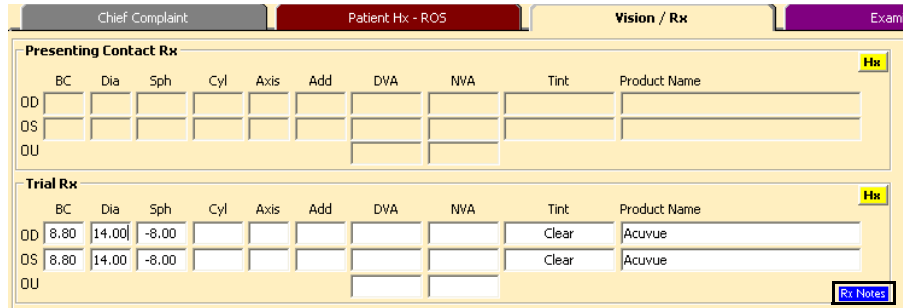
- Ability to copy subjective spectacle manifest prescriptions to subjective spectacle cycloplegic prescriptions.



- Expanded pupillary distance measurement grid (0.5 increments).



- Ability to quickly notice if there are contact lens trial and final Rx notes and spectacle final and alternate Rx notes from the ExamWRITER chart window.



## ExamWRITER Editor

The improved ExamWRITER Editor windows contain the following new feature:

- ❖ Ability to customize descriptive exam text.

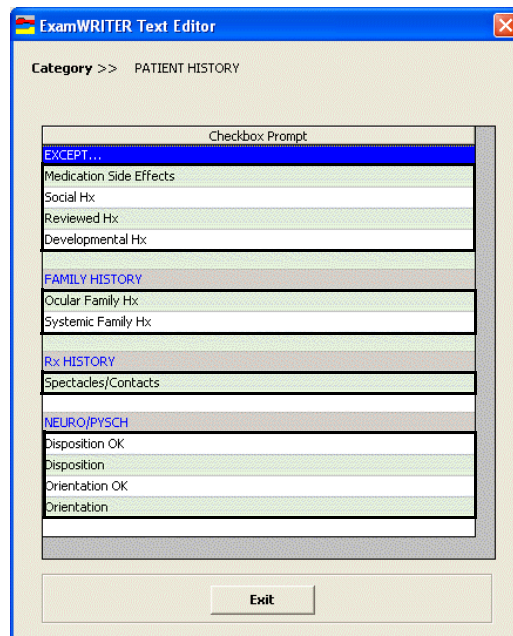
### Note

To view your changes in the ExamWRITER chart window, you *must* close and reopen ExamWRITER after you modify text in the ExamWRITER Editor.

To customize exam text, click **Tools** on the ExamWRITER main window and select **Menu Editor**. Click on a category and then click **Text Editor** in the Exam, Report and Auto Letter Sequence Editor window. Double-click on a sub-category to customize the exam text within the category.

### Notes

- Modifying text within sub-categories does not alter check box prompts in ExamWRITER windows; instead, it populates the Expanded Description text box in ExamWRITER windows with your modified sub-category text.
- Editing text within sub-categories only modifies text in current and new exams; text modifications will *not* be visible in previous exams.

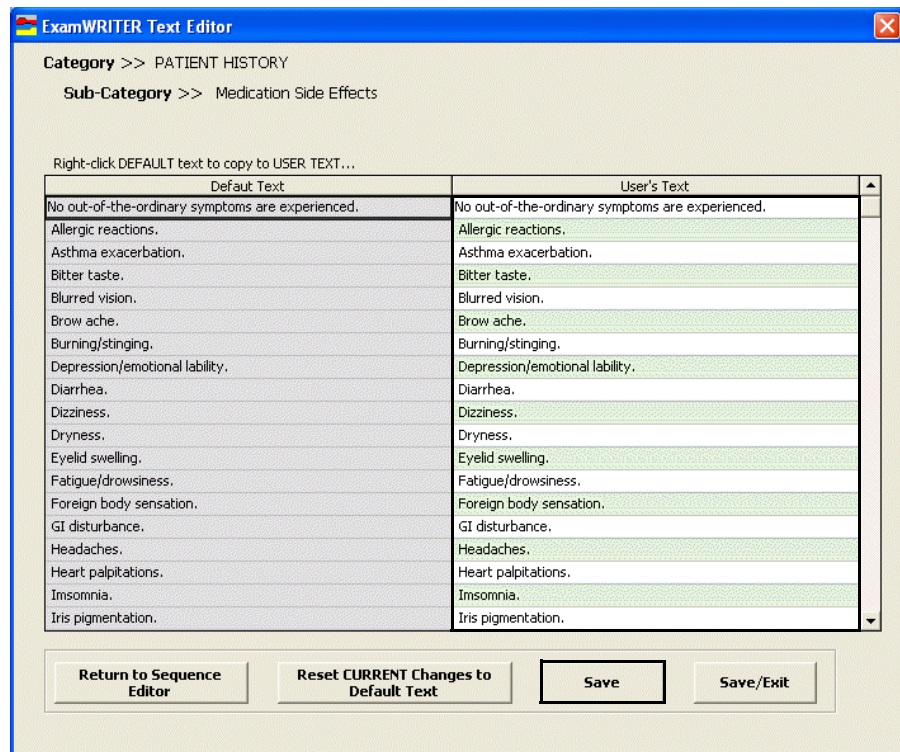




Double-click on a string of User's Text, modify the text, and click **Save**.

### Notes

- 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.



## Patient Quick List

The new Patient Quick List contains the following new feature:

- ❖ Ability to quickly view and access patient demographic and exam information for patients who have open exams, appointments on the current day, or whose information has been modified in the Patient Information Center or Patient Demographics window on the current day.

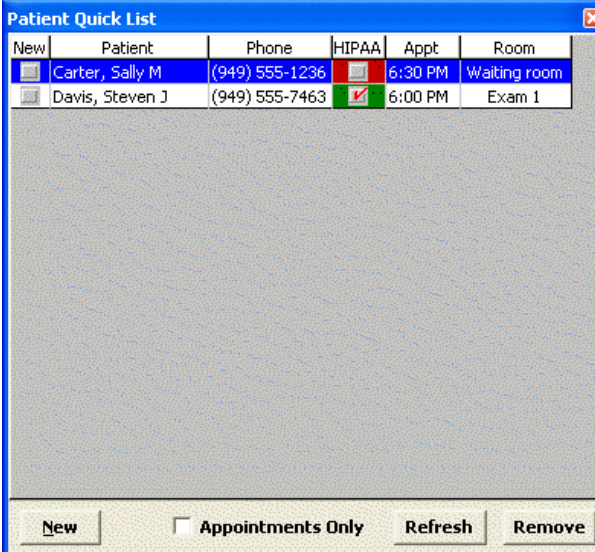
To open the Patient Quick List, click the **QuickList** icon on the ExamWRITER chart window anytime during an exam or click **Tools** and select **Show Patient Quick List** on the ExamWRITER main window.

To use the Patient Quick List in the ExamWRITER main window, click on a patient's name 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; or, drag and drop

the patient on the Patient Hx icon to open the Patient Information Center. You can also right-click on a patient's name and select **Patient History** to modify patient's information, **New Exam** to begin creating a new exam record for the patient, or **Update Patient Room** to open the Patient Room window and select the room in the office where the patient is currently located. If the patient in the Patient Quick List window is new, right-click on the patient's name and select **Add Patient** to add the patient to your ExamWRITER database.

#### 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.
- The HIPAA column is color coded to quickly notify you of the status of the patient's HIPAA documents. If the column is red, the patient did not sign the HIPAA documents; if the column is green, the patient read and understood the HIPAA documents; and if the column is yellow, the patient read and modified the HIPAA documents.
- 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 the new default ExamWRITER preferences, go to [Preferences on page 32](#).
- To sort the list by patient, phone number, or appointment, click on the column headings.
- Click **New** to open the Patient Demographics window and add a patient to your ExamWRITER database.
- Click **Refresh** to manually refresh the Quick List.
- To display patients with appointments only, select the **Appointment Only** check box and click **Refresh**.
- Click on a patient and then click **Remove** to remove the patient from the Quick List.
- To maintain a list of office room locations in the Patient Room window, open the Customization window in OfficeMate (or ExamWRITER, if you are a standalone user), click the **List Box Selections** tab, and modify the **Office Locations** Entry Field Name.



The screenshot shows a window titled "Patient Quick List" with a table of patient data. The table has columns for "New", "Patient", "Phone", "HIPAA", "Appt", and "Room". Two rows are visible: one for "Carter, Sally M" and one for "Davis, Steven J". The "Carter, Sally M" row is highlighted in blue. Below the table are four buttons: "New", "Appointments Only" (with an unchecked checkbox), "Refresh", and "Remove".

New	Patient	Phone	HIPAA	Appt	Room
<input checked="" type="checkbox"/>	Carter, Sally M	(949) 555-1236	<input type="checkbox"/>	6:30 PM	Waiting room
<input type="checkbox"/>	Davis, Steven J	(949) 555-7463	<input checked="" type="checkbox"/>	6:00 PM	Exam 1

Buttons:   Appointments Only

## Diagnosis/Procedure Coding

The most recent diagnosis codes are imported into your current list of diagnosis codes in the Customization window. None of your current diagnosis codes will be overwritten; only new codes will be added.

The improved Diagnosis/Procedure Coding window contains the following new features:

- List of patient insurance carriers.
- Ability to view only the Quick List services that you frequently use.

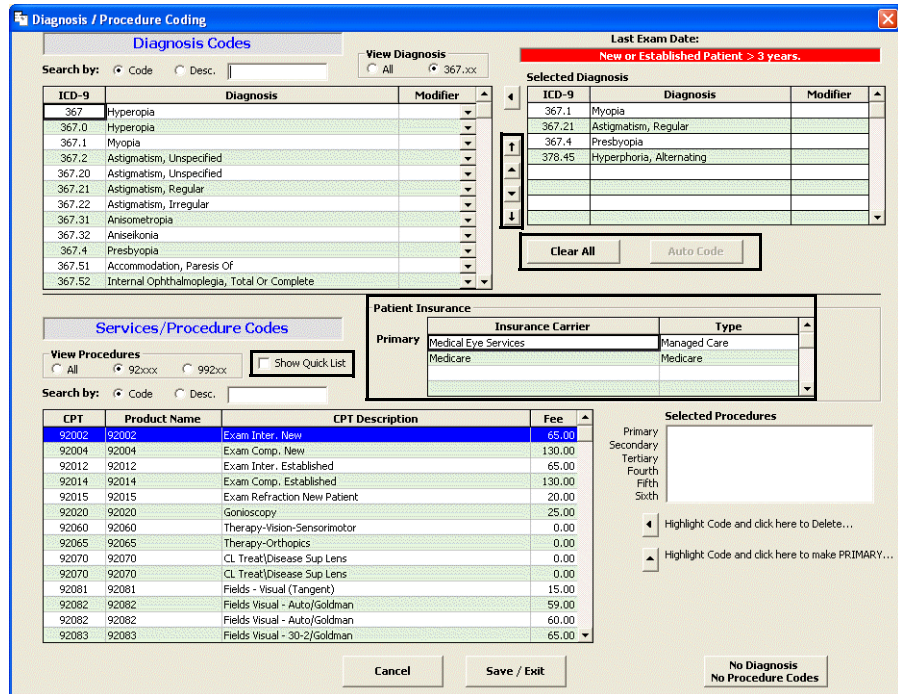
To view only the services that you frequently use, select the **Show Quick List** check box.

- Automatically assigns diagnosis codes for impressions recorded in an exam record.

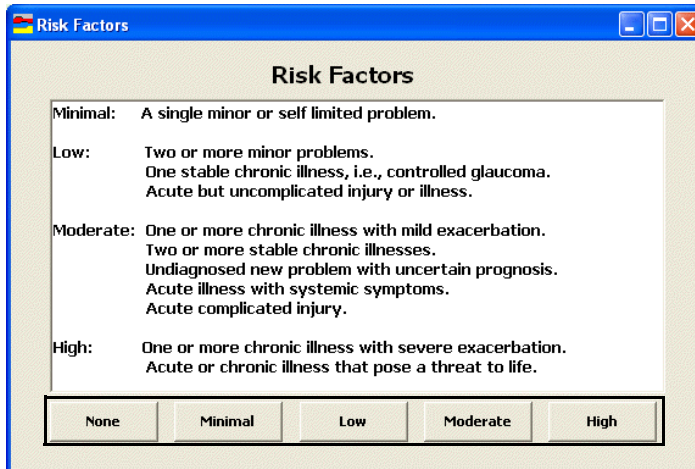
To view diagnosis codes that have been automatically assigned, record impressions in an exam and click the **Coding** icon. The diagnosis codes automatically appear in the Selected Diagnosis table.

### Note

- To delete the diagnosis codes from the Selected Diagnosis table and manually record the codes and modifiers, click **Clear All**.
- To automatically populate the Selected Diagnosis table, click **Auto Code**.
- To rearrange or delete the codes in the Selected Diagnosis table, click the arrows to the left of the 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.
- 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.
- 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 re-record the impressions in the exam record in order to automatically assign diagnosis codes in the exam record.



- Ability to assign risk factors to medical decisions.  
To assign risk factors, record 992xx procedure codes and click **Save/Exit**.  
Select a risk factor from the Risk Factors window.



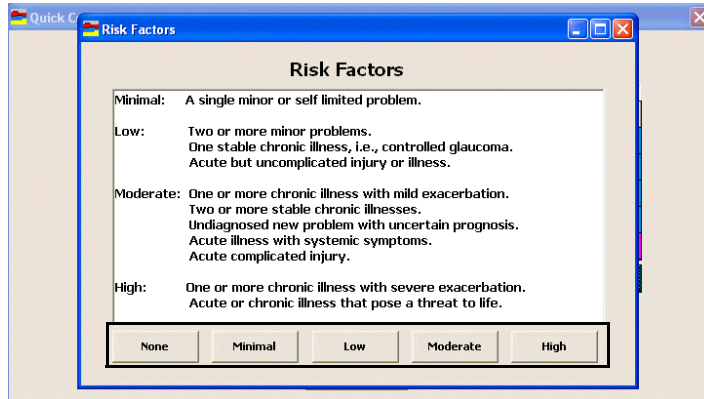


## Quick Code

The improved Quick Code window contains the following new feature:

- Ability to assign risk factors to medical decisions.

To assign risk factors, click the **Risk** column heading and then select a risk factor from the Risk Factors window.



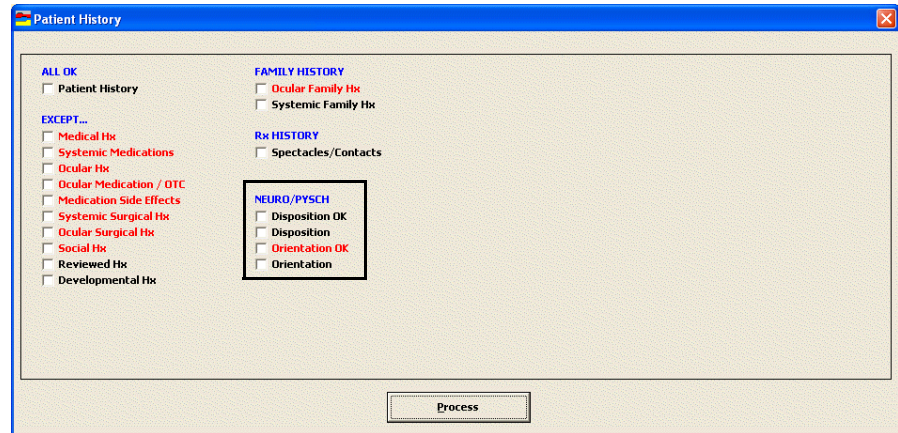
## Patient History

The improved Patient History category contains the following new features:

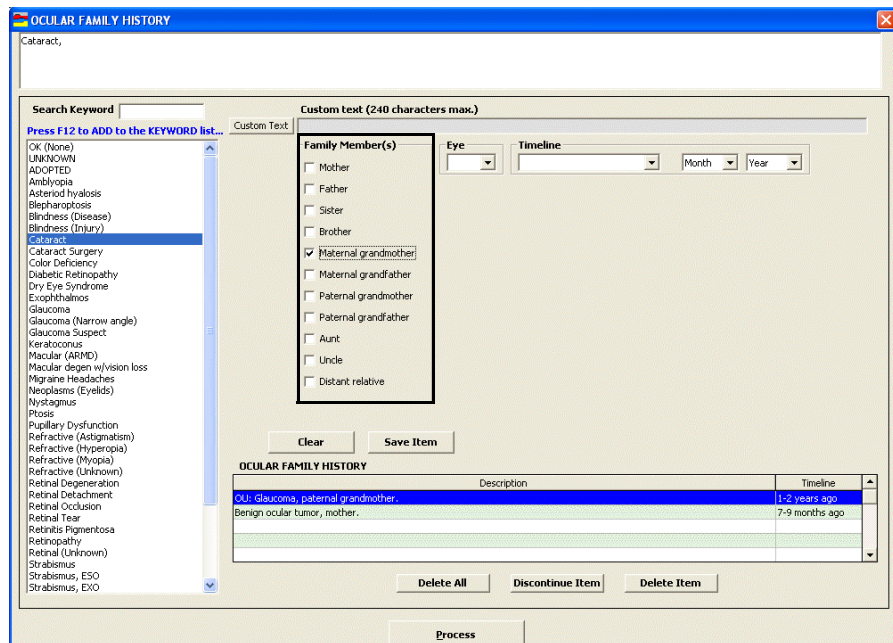
- New Social History window that makes recording patients' social histories easier and more intuitive.

To record information in 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**.

- Ability to record patients' dispositions and orientations.



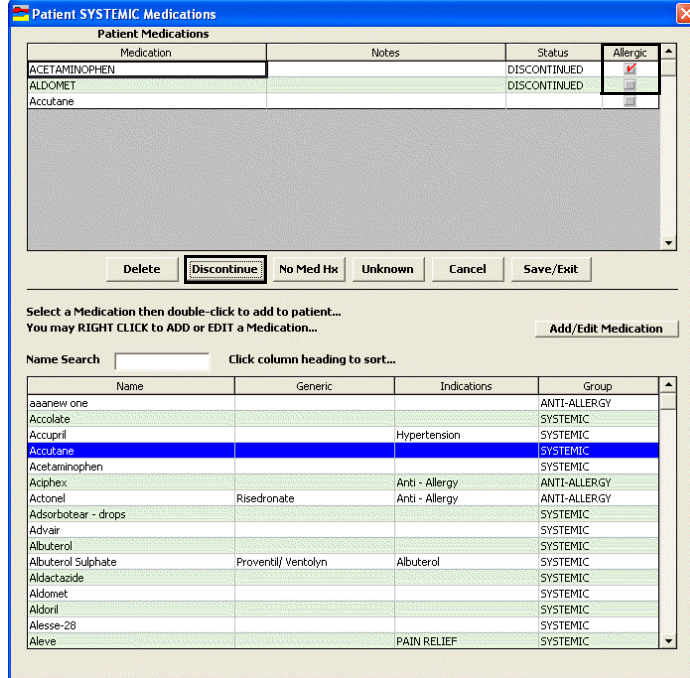
- Ocular Family History and Systemic Family History windows allow you to record multiple ocular and systemic histories for multiple family members.



- Ability to denote if a patient is allergic to a specific medication in the Patient Systemic Medications and Patient Ocular Medications windows.

- Ability to record a medication as being discontinued in the Patient Systemic Medications and Patient Ocular Medications windows.

To record a medication as being discontinued, select the patient medication and click **Discontinue**. The medication's status is marked as discontinued and it is removed from the list of medications. To unmark a medication as being discontinued, open the Patient Information Center. For more information on unmarking medications as being discontinued, go to [Patient Information Center](#) on page 5.





## Reason for Visit

The improved Reason for Visit window contains the following new features:

- Ability to view when the **Prior Records exist** check box is selected from the ExamWRITER chart window.
- Ability to view (but not record) the last exam dates of established patients in the **Last Exam Date** text box.
- Ability to select the date of a new patient's last eye exam in the **Last Eye Exam** drop-down menu.
- Ability to select the date of the patient's last physical (medical) exam in the **Last physical exam** text box.
- Ability to select multiple special needs in the **Special needs** text box.

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

The screenshot shows the 'Reason for Visit' window with the following details:

- Established** (green status bar)
- Last Visit Date:** 03/30/2004
- Last Exam Date:** 03/30/2004
- No Show Today:**
- Prior Records exist:**
- Last Eye Exam:** 10-12 months ago
- Occupation:** Electrician
- Exam Technician:** Duncan, Tom
- Primary Care Physician:** Jason Scott, M.D.
- Comanaging Physician:** Anna Smith, O.D.
- Last physical exam:** 10/3/16/2005
- Consult Request:** Blurred vision
- Medical Consult:** Laser iridectomy consultation
- Special needs:** (Dropdown menu open with options: Examination requested by special need agency, Patient accompanied by parent or guardian, Patient accompanied by care person, Translator assisted examination, Patient is in need of, Patient is not capable of subjective communication.)

**Type of Exam** section:

Description	CPT
Adult exam	
Adolescent exam	
Pediatric exam	
Emergency	
Preop	
Postop	
Diabetic	
Retina/Vitreous	
Glaucoma	
Macular degeneration	
Strabismus	
Contact lens	
Contact lens dispensing	
Nursing home	
Low vision	
Re-exam	
Refraction	

**Failed Screening** section:

- Failed School vision screening
- Failed Drivers vision test
- Cautioned at a Community vision screening
- Failed PCP vision screening

**Patient is interested in:**

- Wearing Contact lenses
- Corneal Refractive therapy
- LASIK
- Low vision options
- Sports vision options

Buttons: Exit, Process

# Plan - Management

The improved Plan - Management tab contains the following new features:

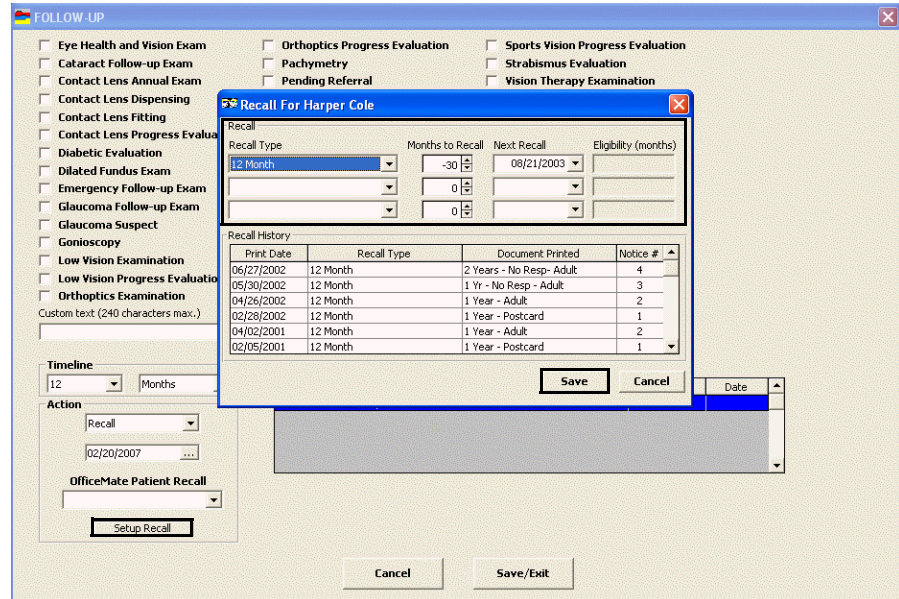
- Indiana, South Carolina, and Florida state compliant medication Rx forms.
- Redesigned and easier to read printed Rx forms that include Rx notes, PDs, lens information, tints, add-ons, and contact lens care regimens.

Print Date: 03/27/2006	<b>OfficeMate Software Solutions</b> 15375 Barranca Pkwy Building L Irvine, California 92618 Phone: 800-269-3666 FAX:	Exam Date: 03/14/2006 Expiration Date: 03/14/2007					
<b>Final Contact Rx</b>							
<b>Patient: Sally Carter</b>		<b>Age: 49</b>					
9696 Calle Dulce San Juan Capistrano, CA 92675							
<b>OD:</b>							<b>Qty: 1</b>
<b>Product:</b>	<b>BC</b>	<b>Dia</b>	<b>Sphere</b>	<b>Cylinder</b>	<b>Axis</b>	<b>Add</b>	<b>Tint:</b>
Acuvue	8.80	14.00	-2.75	SPH.			Clear
<b>OS:</b>							<b>Qty: 10</b>
<b>Product:</b>	<b>BC</b>	<b>Dia</b>	<b>Sphere</b>	<b>Cylinder</b>	<b>Axis</b>	<b>Add</b>	<b>Tint:</b>
Acuvue	8.80	14.00	-2.75	SPH.			Clear
Wear Schedule Daily		Replenishment 2 Weeks		DOT			
<b>Care Regimen</b> Boston							
<b>Notes</b> Use eye drops, if necessary.							
<b>Provider:</b> _____ Michael Miller, O.D. <span style="float: right;"><b>License #:</b> 4646-89</span>							



- Ability to set up recall types and schedules in the Follow-Up window if OfficeMate is also activated.

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 in the Recall tab on the OfficeMate Patient Demographic window.



## Examination

The improved Examination tab contains the following new features:

- Highlighted measurements in the IOP grid display the OD and OS measurements that were used to compute the adjusted IOP. In order to view the highlighted measurements, you must have selected **Examination** from the Category drop-down menu on the Tonometry window.
- Yellow IOP, pachymetry, CD ratio, and blood pressure/pulse **Hx** buttons display the exam histories, including graphs, of these measurements when they are clicked.



- Expanded Special Eye Health Test selections.

## Products

The improved functionality for recording and maintaining product information includes the following new features:

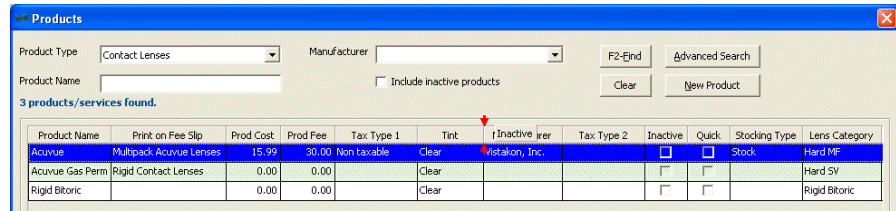
- Redesigned Products window makes adding, editing, and viewing product information faster and easier.

### Note

- After you record or modify information in the Products and Product Details tabs, click **Save** and select **Save** to save the information and keep the Products window open, **Save and New** to save the information and create a new product, or **Save and Exit** to save the information and close the Products window.
- You must assign contact lenses to a lens category in order for them to appear in the Select Contact Lens 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.

The screenshot displays the 'Products : Contact Lens - Acuvue' window. The 'Product Details' tab is active, showing various fields for product information. The 'Product Name' is 'Acuvue', 'Tax Type1' is 'Non taxable', and 'Product Cost' is '\$15.99'. Other fields include 'Print on Fee Slip' (Multipack Acuvue Lenses), 'Stocking Type' (Stock), 'Lens Category' (Soft Sphere Disposable), 'Manufacturer' (Vistakon, Inc.), 'Tint' (Clear), and 'Material' (Etafilcon A). The 'Additional Fees' section shows a table with 'Patient Fee Type' and 'Fee' columns. The 'HCFA - 1500 Additional Information' section includes 'CPT/HCPCS Code' (V2520 CL Soft Sphere), 'Place of Service' (Office), and 'EPSOT' (EMG). The 'Financial Group' is 'Contact Lens Fees' and the 'Production Group' is 'Soft CL Revenues'. A 'Notes' field is also present. On the right side, there are buttons for 'Save', 'Cancel', 'Delete', 'New', and 'Copy'.

- Ability to drag and drop column headings in the Products window to rearrange column views.

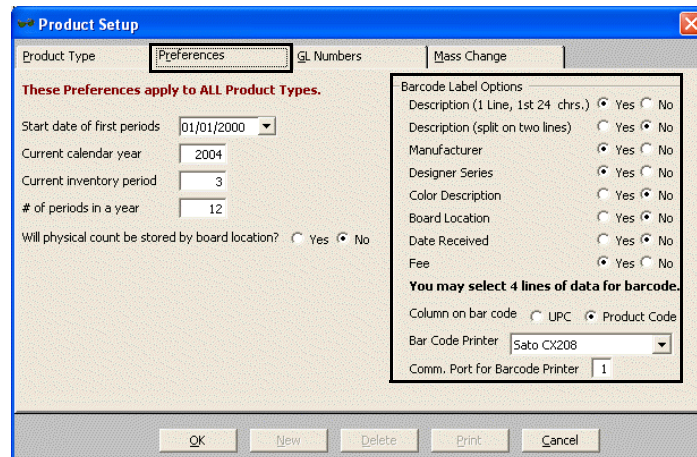


## Product Setup

The new Product Setup window contains the following new features:

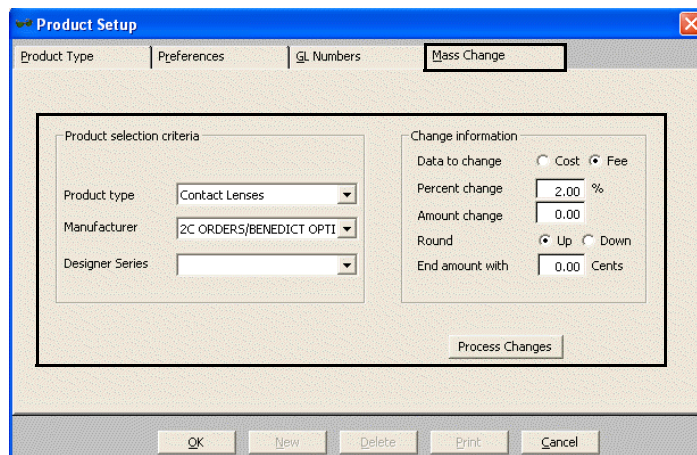
- Ability to set up barcode label options.

To set up barcode label options, click **Tools** on the ExamWRITER main window, select **Product Setup**, click the **Preferences** tab, select appropriate **Barcode Label Options**, and click **OK**.



- Ability to set up mass changes to simplify changes in your costs and fees.

To set up mass changes, click **Tools** on the ExamWRITER main window, select **Product Setup**, click the **Mass Change** tab, select appropriate **Product selection criteria** and **Change information**, click **Process Changes**, and click **OK**.





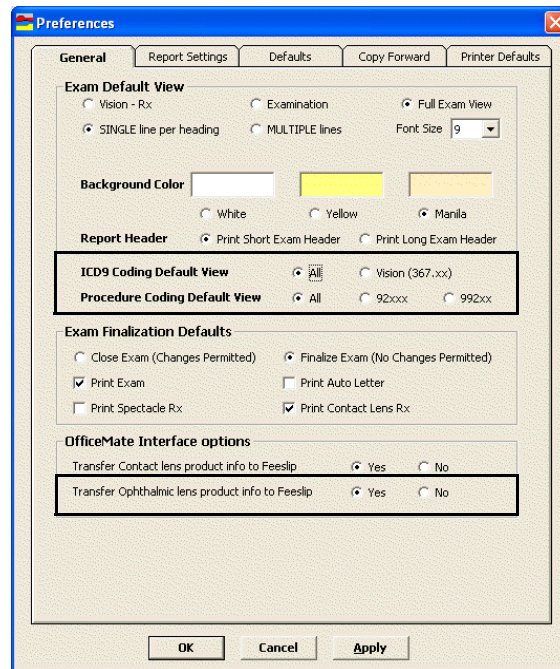
## Preferences

The improved Preferences window contains the following new features:

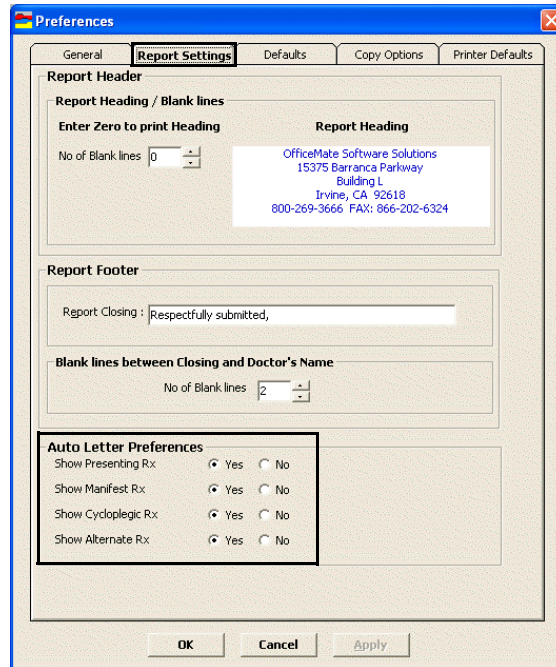
- Ability to designate a default ICD9 coding and default procedure coding view for the Diagnosis/Procedure Coding window.
- New OfficeMate Interface option general preferences allow you to choose if you want to automatically transfer ophthalmic lens products and add-on charges to OfficeMate fee slips.

### Notes

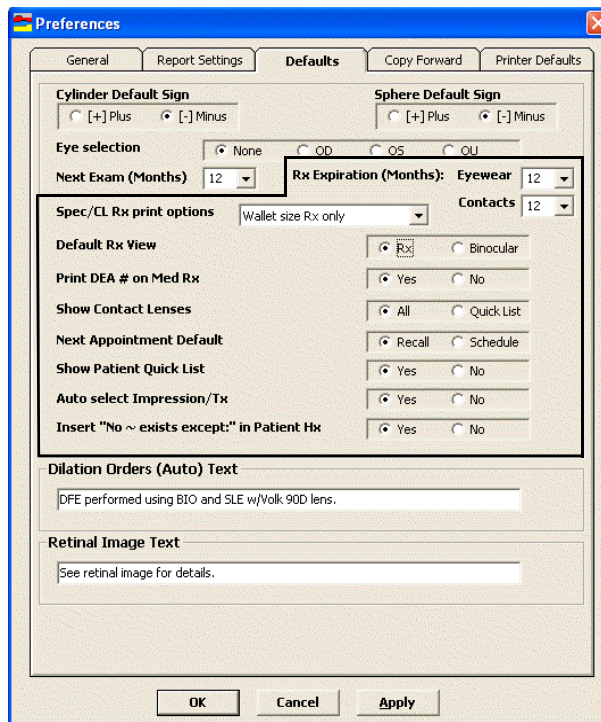
- If you select the **Yes** radio button to transfer ophthalmic lens products to fee slips, open charges will be created in OfficeMate after you create an OfficeMate Rx.
- If you select the **Yes** radio button and select a product with a quantity of 0 in the Contact Lens Rx window, no charges will post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



- New auto letter preferences in the Report Settings System Preference tab.

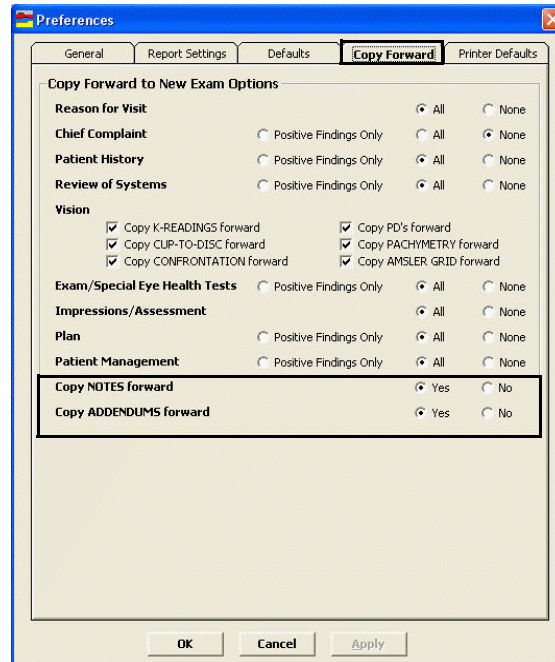


- Additional default preferences, including the Rx expiration date for contact lenses and eyewear, spectacle and contact lens Rx print options, default Rx view in the Final Spectacle Rx tab, print DEA # on medication Rx, show contact lens list in the Rx window, next appointment default, show Patient Quick List, auto select Impression/Tx, and insert “No~exists except:” in Patient Hx.

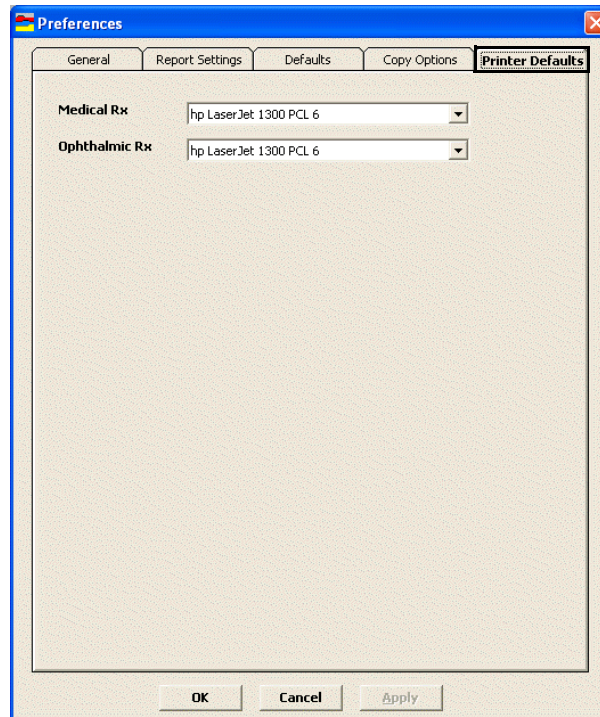




- New Copy Options preferences allows you to choose whether or not you want to copy notes and addendums forward into new exams.



- New Printer Defaults tab allows you to select a default printer for printing medical and ophthalmic prescriptions. This feature allows you to print ophthalmic prescriptions in the optical area where patients have the opportunity to view frames and speak with opticians, which can positively impact sales.



## Medication Maintenance

The improved Medications Maintenance window contains the following new feature:

- Ability to save default dosage and quantity measurements for medications. After selecting a default dosage and quantity from the drop-down menus, the default selections appear in the Quantity and Dosage columns.

The screenshot shows the 'Medications Maintenance' window. At the top, there are fields for 'Quick List' (Yes/No), 'Category' (SYSTEMIC), 'Name' (Actonel), 'Generic' (Risedronate), and 'Indications' (Anti - Allergy). There are also 'New', 'Delete', 'Cancel', and 'Save' buttons. A 'Group' dropdown is set to 'ANTI-ALLERGY'. A 'Default quantity' dropdown is set to 'Ten (10) ml' and a 'Default dosage' dropdown is open, showing options: 'one drop', 'one tablet', 'two tablets', '2', '2 gtt', '3 tablets', and 'Daily wear only'. Below the form is a 'Name Search' field and a table with columns: Name, Generic, Indications, Quantity, and Dosage. The table contains the following data:

Name	Generic	Indications	Quantity	Dosage
aaanew one				
aaanew one				
Accolate				
Accupril		Hypertension		
Accutane				
Acetaminophen			Ten (10) ml	2
Aciphex		Anti - Allergy		
Actonel	Risedronate	Anti - Allergy		
Actos	Pioglitazine	Glycemic Control		
Acular				
Acyclovir				
Adalat CC				
Adderall XR		Amphetamine Mixed Salts		
Adorbotear - drops				
Advair				
Advil, 400mg				
AK-NaCl Ointment		OCULAR SURFACE DZZ		
AK-Pred				
AK-Spore				
AK-Trol				

## Template Maintenance

The improved Template Maintenance window contains the following new feature:

- Ability to copy an available template to a new template to save time creating new templates.

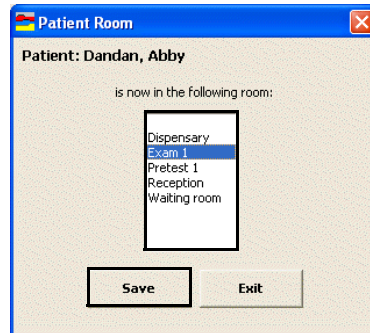
To copy an existing template to a new template, click **Tools** on the ExamWRITER main window toolbar, select **Template Maintenance**, and click **New**. Select an available template, type a new template name in the **Template Name** text box, and click **Copy From**.

The screenshot shows the 'Template Maintenance' window. It has a title bar 'Template Maintenance' and a close button. Below the title bar is a section titled 'Available Templates' with a list box containing the following items: 'COMPREHENSIVE NP (NARRATIVE FORMAT)', 'COMPREHENSIVE NP (LINE ITEM FORMAT)', 'CONTACT LENS EXAM', 'CONTACT LENS FOLLOW UP EXAM', 'GLAUCOMA FOLLOW UP', 'POST OP', 'POST OP LASIK', and 'PRE OP LASIK'. Below the list box is a 'Template Name' text box. At the bottom of the window are buttons for 'Edit Name', 'Edit', 'Reset', 'Cancel', 'Copy From', and 'Save/Exit'. The 'Copy From' button is highlighted with a red box.

## ExamWRITER Control Center

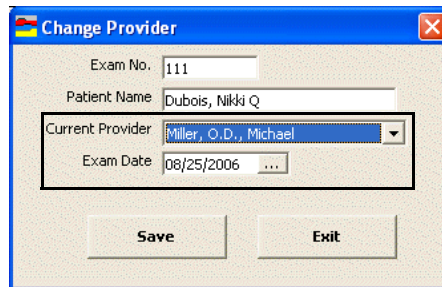
The improved ExamWRITER Control Center window contains the following new features:

- Ability to update a patient's office room location on the Open Charts tab.  
To update a patient's office room location on the Open Charts tab, right-click on a patient, 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.



- Ability to change the provider name and exam date on closed exams in the Chart Search tab.

To change the provider name and exam date on closed exams in the Chart Search tab, right-click on a closed exam and select **Change Provider/Exam Date** 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.



## Business Names

The improved Business Names window contains the following new feature:

- ❖ Separate TPA and DEA numbers.

The screenshot shows the 'Business Names' window with the 'Provider/Staff' tab selected. The 'Select Provider/Staff Member' dropdown is set to 'Miller, O.D., Michael'. The form contains the following data:

Last Name	Miller, O.D.	Provider Type	Solo Practice
First Name	Michael	TPA #	345-454-234
Middle Name		DEA #	8795
Business	OfficeMate Software Solu	EMC Submitter Id	
Phone #	949 727 7080	Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
Fax #	949 727 7479	Provider	<input checked="" type="radio"/> Yes <input type="radio"/> No
License #	4646-89	HIPAA NPI Number	
Tax ID Type	Employer I.D. Number	EIN Number	
Tax ID	66-456872	Privacy Training Date	
UPIN #	123646	HIPAA Privacy Officer	<input type="radio"/> Yes <input checked="" type="radio"/> No
User ID	MICHAELM		
Professional Signature			

Buttons at the bottom: New, Cancel, Delete, Save, Save/Exit.

## Auto Letters

The improved auto letters contain the following new features

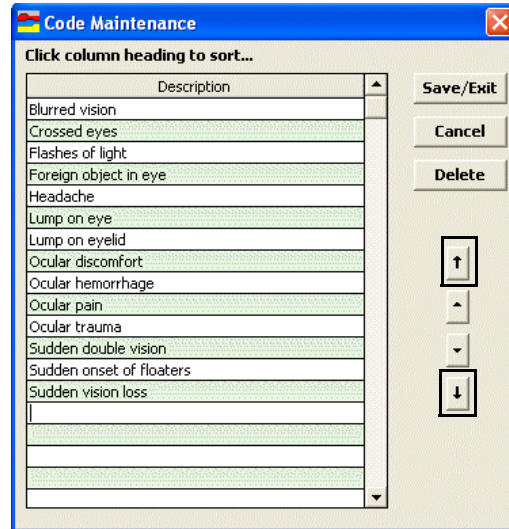
- Ability to print visual acuities if an Rx is not recorded.
- Ability to choose auto letter printing preferences in the Report Settings System Preference tab. For more information on the new auto letter printing preferences, go to [Preferences on page 32](#).



## Code Maintenance

The improved Code Maintenance windows contain the following new feature:

- ❖ Ability to move items to the top or bottom of the list by clicking one of the new arrows on the right side of the window.



## Addendum

The improved addendum feature in finalized exams includes the following new feature:

- ❖ Ability to date and time stamp addendums. If your security is active, you can also stamp the name of the person recording the addendum in the finalized exam.

## Equipment Interfaces

If you have purchased and installed the ExamWRITER equipment interface integration and have upgraded to ExamWRITER 7.3, you will be able to interface with the following equipment:

- Heidelberg/HRT
- Konan
- Reichert Ophthalmic Instruments
- Marco ARK-600, ARK-700A, ARK-730A, ARK-760A, ARK-530A, and ARK-710A
- Topcon CL100
- EyeTel Imaging

## Eyemaginations

ExamWRITER now integrates with Eyemaginations to provide customized animated education videos to patients. After an exam is coded, click the **Eyemaginations** icon to play videos specially created for the patient based on the diagnosis and procedure codes you recorded. For more information on this new integration, contact the Sales team at 800.269.3666 or [sales@officemate.net](mailto:sales@officemate.net).



## Other

Other enhancements include the following new features:

- Locked exam documents under the Print icon menu so that exam content can not be altered within a word processing program.
- Addition of occupation and chart number on the printed exam short header.
- Ability to renew your Annual Software Maintenance Agreement (ASMA) online at our Web site [www.officemate.net](http://www.officemate.net).
- Notification when a patient's name is changed so that the change is not saved in error.
- Ability to view patient HIPAA information at the top of the ExamWRITER chart window. The HIPAA flag is color coded to quickly notify you of the status of the patient's HIPAA documents. If the flag is red, the patient did not sign the HIPAA documents; if the flag is green, the patient read and understood the HIPAA documents; and if the flag is yellow, the patient read and modified the HIPAA documents.

