

Optos Web Patient Registration: End User Instructions



Purpose

Optos Web Patient Registration (OWPR) is a web-based platform to allow for patient entry, adding to the already-existing option of entering patients using the tablet that comes with your device. This document outlines the steps required to access the tool and enter patients.

Contents

Purpose.....	1
Accessing Optos Web Patient Registration	1
Creating and Editing Optos Web Patient Registration Users	2
Creating a New User.....	2
Editing Existing Users	3
Editing Your Account	3
Entering Patient Names.....	4
Manual Patient Entry	4
Entering Patients via CSV Upload	5

Accessing Optos Web Patient Registration

- 1 | In your web browser, enter the hostname or IP address of the server with :8088 at the end. Reference the address bar on your workstations that access OptosAdvance™, not the Optos PC server. If you are accessing OptosAdvance with an IP address, use the same IP address to access Optos Web Patient Registration.

Examples:

<http://optosadvance:8088>

<http://123.234.456.789:8088>

For OptosCloud™ only sites: Use the device serial number found on the back of the device followed with :8088

<http://serialnumber:8088>

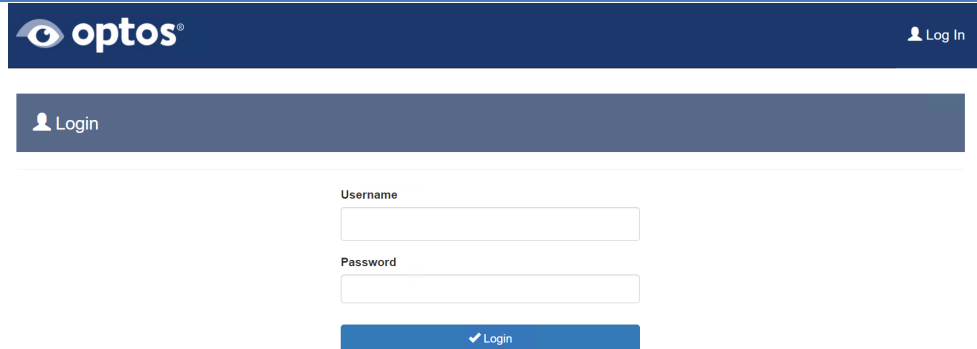
NOTE: Ensure the web address begins with http. OptosAdvance is an internal web server, unlike an actual website, therefore it uses http rather than https.

- 2 | For first-time access, enter the default username and password below. For subsequent access, use the login Information setup by your administrator.

Username: optosadmin

Password: optomap1

Optos Web Patient Registration: End User Instructions

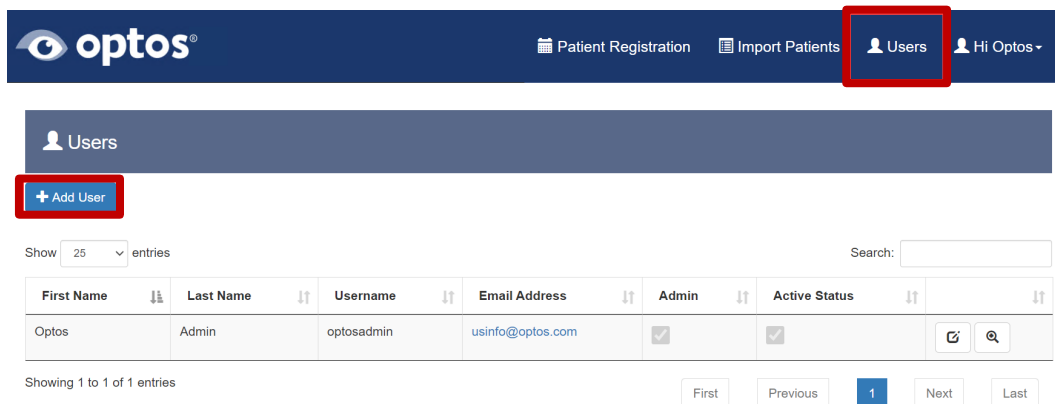
The login form features the Optos logo in the top left and a 'Log In' link in the top right. Below the logo is a 'Login' button. The main form contains two input fields: 'Username' and 'Password', followed by a blue 'Login' button with a checkmark icon.

Creating and Editing Optos Web Patient Registration Users

Creating a New User

For the best user experience, each staff member should have their own username and password for accessing Optos Web.

- 1 | After logging in, select **Users** from the top menu bar.
- 2 | Select the blue **+Add User** button.



The screenshot shows the 'Users' management page. The top navigation bar includes 'Patient Registration', 'Import Patients', 'Users' (highlighted with a red box), and 'Hi Optos'. Below the navigation bar is a 'Users' header with a '+ Add User' button (also highlighted with a red box). A table displays the current user list with columns for First Name, Last Name, Username, Email Address, Admin, and Active Status. The table contains one entry for 'Optos Admin' with the username 'optosadmin' and email 'usinfo@optos.com'. Both the 'Admin' and 'Active Status' checkboxes are checked. Below the table, it shows 'Showing 1 to 1 of 1 entries' and pagination controls for 'First', 'Previous', '1', 'Next', and 'Last'.

First Name	Last Name	Username	Email Address	Admin	Active Status
Optos	Admin	optosadmin	usinfo@optos.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 3 | Enter the required information in the resulting pop-up.
- 4 | Select the **Active Status** checkbox to activate the username to use Optos Web.
- 5 | If the user will be managing access for other users of Optos Web, select **Admin**.
- 6 | Select the **Save** button to create new user record.

Optos Web Patient Registration: End User Instructions



Add User

← Back to List

First Name

Last Name

Username

Password

Email Address

Admin

Active Status

Save

Editing Existing Users

- 1 | After logging in, select **Users** from the top menu bar.
- 2 | Locate the user in the list that appears and navigate to the far right-hand column.
 - a. Pad and paper icon: used to modify user details
 - i. To deactivate the user, deselect the **Active Status** option
 - b. Red x icon: used to delete a user record

Editing Your Account

- 1 | After logging in, locate the top menu bar and select the option that reads, "Hi ____".
 - a. Select **My Account** to modify your account details.
 - b. Select **Change Password** to modify your password (you may also complete this action in the My Account option).

Users
Hi Optos ▾

My Account

Change Password

Log Out

My Account

Change Password

First Name Optos

Last Name Admin

Username optosadmin

Email Address usinfo@optos.com

Admin

Active Status

Optos Web Patient Registration: End User Instructions



Entering Patient Names

Adding patient names to the system can be done one-by-one or through an upload of a .csv file from your electronic health record (EHR) system. Optos Web Patient Registration does not save any data aside from the medical record number (MRN).

Manual Patient Entry

- 1 | Select **Patient Registration** from the top menu bar.



- 2 | Enter the following details for the patient and press **Submit**.

- a. MRN
- b. Patient First Name
- c. Patient Middle Name
- d. Patient Last Name
- e. Patient Sex
- f. Patient DOB (mth/day/yyyy)
- g. Provider Name (optional)

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Optos Web Patient Registration

Carefully complete the form below to add a new patient to the schedule. When you click the "submit" button, we will send the patient information to Optos Advance (OA).

<p>MRN</p> <input style="width: 95%; height: 25px;" type="text" value="MRN"/>	<p>First Name</p> <input style="width: 95%; height: 25px;" type="text" value="First Name"/>	<p>Middle Name</p> <input style="width: 95%; height: 25px;" type="text" value="Middle Name"/>
<p>Last Name</p> <input style="width: 95%; height: 25px;" type="text" value="Last Name"/>	<p>Sex</p> <input style="width: 95%; height: 25px;" type="text" value=""/>	<p>DOB</p> <input style="width: 95%; height: 25px;" type="text" value="mm/dd/yyyy"/>
<p>Provider Name</p> <input style="width: 95%; height: 25px;" type="text" value="Provider Name"/>		

✔ Submit

The system will perform a check to ensure the MRN does not already exist. If it does not, the patient will be added. If the MRN does exist, you will receive a pop-up advising you of the duplicate entry.

Success! The Patient (MRN: E123456) was successfully submitted.

- 3 | Log-in to OptosAdvance to view the newly added patient record.

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Entering Patients via CSV Upload

To reduce manual entry, you have the option to enter patients using a .csv file type.

- 1 | Select **Import Patients** from the top menu bar.



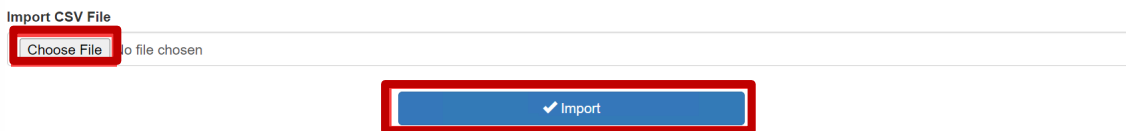
- 2 | If needed, download a sample of the required format on the website. Once you have a properly formatted file, proceed to the next steps.



Please select a Comma Separated (CSV) file. When you click the "import" button, we will send the patients to Optos Advance (OA). Please click the download button to get the sample CSV file.



- 3 | Select **Choose File**.
- 4 | From the file menu that appears, locate the properly formatted .csv file and select **Open**.
- 5 | Select **Import** to begin the import process. When the process has finished, you will see a message indicating its success.



- a. Import Status of **Success** indicates you will see the record in *OptosAdvance*.
- b. Import Status of **Failed** indicates it was a duplicate MRN, the patient exists in *OptosAdvance*, and was not uploaded.

