



Optos Web Patient Registration: End User Instructions



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

Purpose

Optos Web Patient Registration 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.

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>

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



optos[®] Log In

Login

Username

Password

✓ Login

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.

optos[®] Patient Registration Import Patients Users Hi Optos

Users

+ Add User

Show 25 entries Search:

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

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

- 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)

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).

MRN <input type="text" value="MRN"/>	First Name <input type="text" value="First Name"/>	Middle Name <input type="text" value="Middle Name"/>
Last Name <input type="text" value="Last Name"/>	Sex <input type="text" value=""/>	DOB <input type="text" value="mm/dd/yyyy"/>
Provider Name <input type="text" value="Provider Name"/>		

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.



Optos Web Patient Registration: End User Instructions



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.



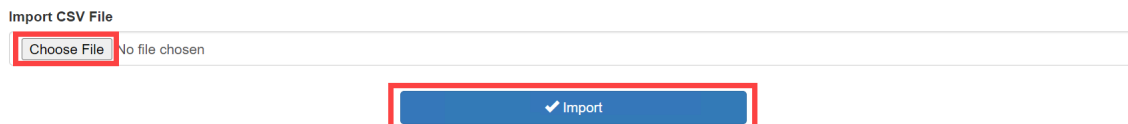
- 2 | If needed, download a sample of the required format on the website. Once you have a properly formatted file, proceed to the next steps.



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.

