



# Working with the software

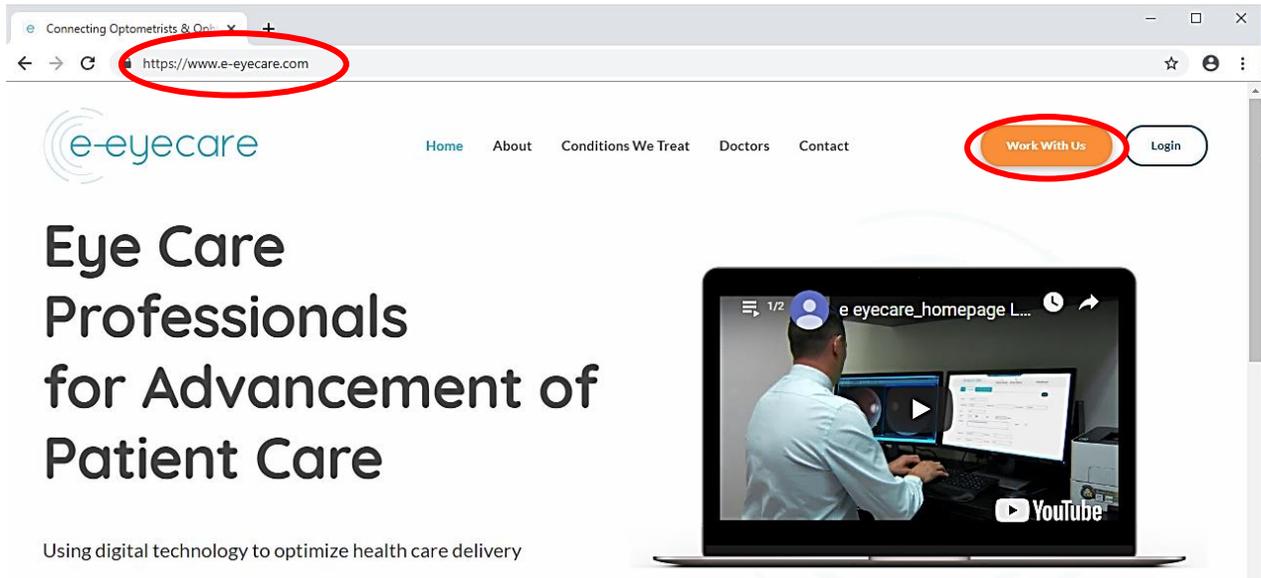
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# How to Create an Account:

*For both Referring and Consultant Doctors*

**Step 1:** Go to [e-eyecare.com](https://www.e-eyecare.com) > click on **“Work With Us”**



Step 2: Fill out the **registration form**

User Account

**Logon Information**

E-mail:\*  Password:\*  Confirm password:\*

Password must be at least 6 letters long, include one number, and one upper case letter.

**Access Request Information**

First Name:\*  Middle Name:  Last Name:\*

**PRIMARY OFFICE**

Profession\*

Business Name:

Address 1:\*

Address 2:

City:\*

Province:\*

Postal Code:

Telephone:\*   
(E.g., +1 780.000.0000)

PRACTICE ID\*

Practice Permit Document\*   
(.doc, .docx, .xls, .xlsx, .pdf, .jpg, .jpeg)

Facility No.   
(for ophthalmologists only)

Fax:\*   
(E.g., +1 780.000.0000)

**All fields with asterisk (\*) are mandatory**

I'm not a robot 

- a. Check **'I'm not a robot'** >
- b. Click **Submit**.

Once submitted, a representative will open full access within 2 business days.

If you have any questions, please feel free to contact us at:

**TF:** 1.855.258.9425

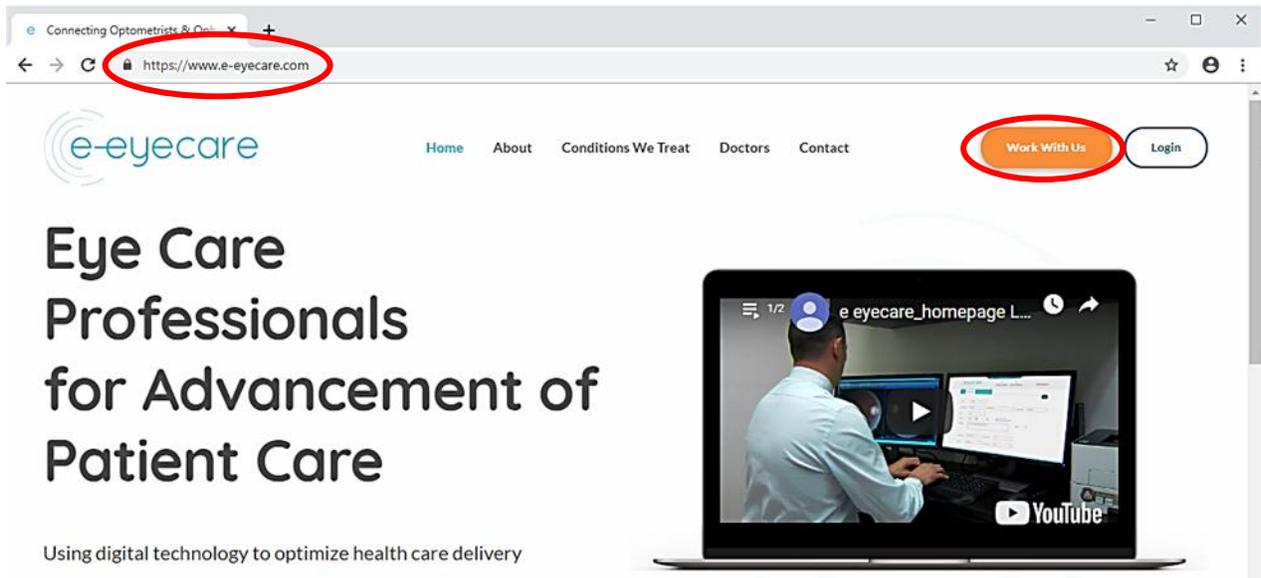
**P:** 780.758.3346

**E:** info@e-eyecare.com

# Creating a new patient chart

## Part 1: Log-in

1. Go to [e-eyecare.com](https://www.e-eyecare.com) > "Work With Us"



2. On your **Dashboard**, enter the **patient health care number** and **province** of residence

A screenshot of the e-eyecare.com dashboard. The top right corner displays contact information: Helpline: 1-800-979-1577 (Mon-Fri, 8AM - 5 PM PST) and Technical support: admin@e-eyecare.com (after hours support). The dashboard has a header with the e-eyecare logo and navigation options: Patient Chart(s) and System Options. The main section is titled 'CREATE CHART' and contains two radio buttons: 'Create chart for existing patient' (selected) and 'Create chart for new patient'. Below these are input fields for 'Health Care No.' (circled in red), 'Province:' (with 'AB' selected, also circled in red), and a 'Chart:' dropdown menu. A red circle highlights the '+ Create New Chart' button. Below the 'CREATE CHART' section is a 'FILTER RECORDS' section with fields for 'From:', 'To:', 'Status:', 'PHNo:', 'First Name:', and 'Last Name:'. A 'Find' button is located to the right of these fields. At the bottom, there is a table with columns: Case/Chart No, Patient Name, Date of Referral, Status, and Date of Review. The first row of data shows: AB-222222222222-0002, test TEST, Draft, and an empty Date of Review field.

3. Click on 'Create New Chart'

The following section, **Demographics**, is only required for new patients and first-time charts. For existing patients or recurrent referrals, you will be automatically redirected to **Part 2. Chart** (on page 5) upon entering patient health care no. and province to on your **Dashboard**.

- To create a chart for **a new a patient**, you will be redirected to the '**Demographics**' tab. Please fill in all the mandatory information indicated by the red (\*) asterisk.

The screenshot shows the 'Demographics' tab selected in a navigation bar. A red asterisk (\*) is placed above the text 'All fields with asterisk (\*) are mandatory'. The form contains the following fields:

- Health Care No.\*: 11111111111
- First Name\*: John
- Middle Name: (empty)
- Last Name\*: SmithTest
- Sex\*: Male
- DOB\*: 1960, Nov, 16
- Age: 58
- Years: (empty)
- Allergies: Penicillin
- NKDA:
- Address 1\*: 111 Test Road
- Address 2: (empty)
- Province\*: BC
- City\*: Burnaby
- Rural Area Name: (empty)

- If the patient has a family physician, please provide GP's **name** and **fax number** at the bottom of the 'Demographic' section.

This is important as we will be sending the GP a fax updating them on patient health essentially closing the communication loop between all health care professionals.

The screenshot shows the bottom section of the 'Demographics' form with the following fields:

- GP Name: (highlighted in yellow and circled in red)
- GP Address 1: (empty)
- GP Address 2: (empty)
- GP City: (empty)
- GP Province: Select
- GP Postal Code: (empty)
- GP Fax: (highlighted in yellow and circled in red)

(E.g., +1 780 000 0000 )

- Click **Save** found on the top right on the same Demographics page to proceed in creating a chart.

The screenshot shows the bottom navigation bar with the following tabs: Chart, Demographics, Letters, Previous Charts. The 'Save' button is highlighted in a red circle.

**Part 2: Creating a Chart.** There are 7 steps to completing a chart and sending it for referral under the section **Chart**:

1. A blank **chart** with patient's information is shown after you save the patient's demographics (for first time charts), or upon clicking on '**Create New Chart**' on your **Dashboard** for recurrent referrals.

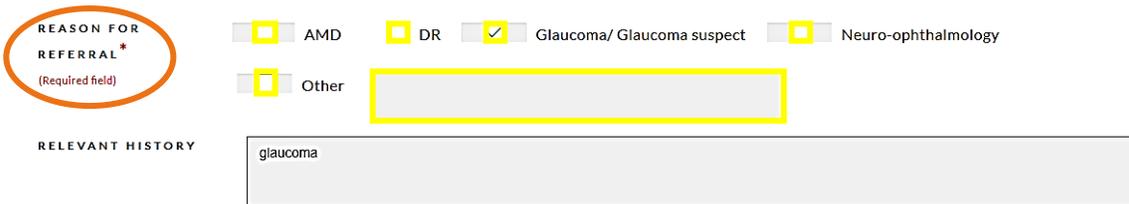


Chart Demographics Letters Previous Charts

PATIENT INFO: Patient Name: John Smith Test | City: Burnaby | Province: BC Save

AGE 58 Years SEX Male APPOINTMENT DATE 02/26/2019 BC-1111111111-0002

2. **Reason for referral:** Indicate reason for referral and Relevant History if any.



REASON FOR REFERRAL \* (Required field)

AMD  DR  Glaucoma/ Glaucoma suspect  Neuro-ophthalmology

Other

RELEVANT HISTORY

glaucoma

3. **Letter:**

Option 1. Click on **Upload Files** to upload a referral letter

*This option also allows you to **upload videos** and any other supporting files or media supported by the indicated formats.*



Upload referral letter/other supporting files

Upload Files Supported file formats are: .pdf, .doc, .docx, .xls, .xlsx, .txt, .pdf, .tif, .tiff, .mp3, .mp4, .mov, .m4v

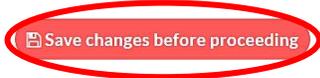
Category	File Name	Extension	Size (KB)	Upload Date	Delete File
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Option 2. Click on the **POHx/PMHx – Meds – Clinical Exam** drop-down menu to manually enter the patient information

The screenshot shows a clinical exam form with several sections:

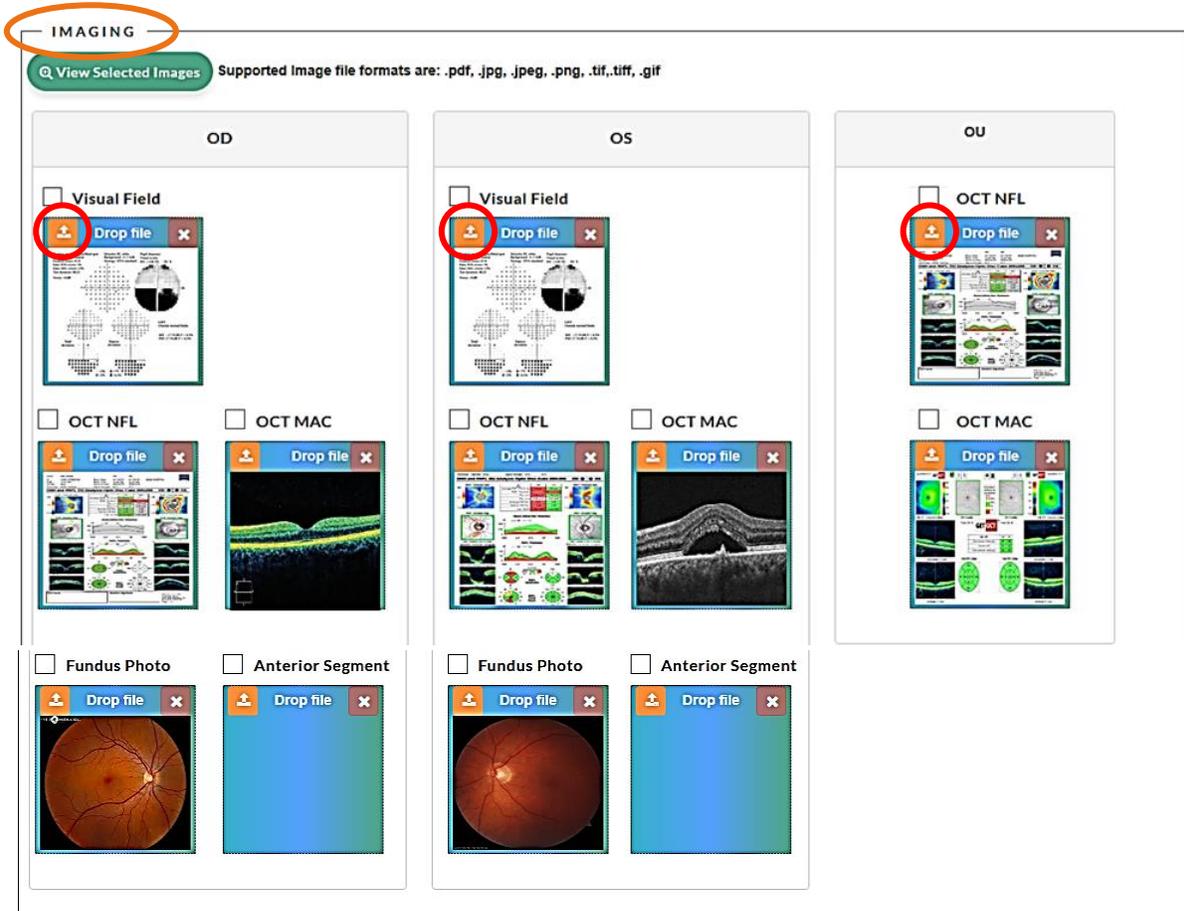
- VA**: Visual Acuity section with input fields for OD and OS, and a dropdown menu for 20/150.
- SC**: Snellen Chart section with input fields for OD and OS, and a dropdown menu for 20/150.
- CC**: Chief Complaint section with input fields for OD and OS, and a dropdown menu for Select.
- Rx**: Prescription section with input fields for OD and OS.
- POHx**: Past Ocular History section with checkboxes for Glaucoma, AMD, DR, and Previous Surgery, and a text field for Surgical History.
- PMHx**: Past Medical History section with checkboxes for CVD, Thyroid, CVA, DM, and Other.
- MEDICATIONS**: Medications section with input fields for Systemic Meds, Ocular Meds, and Allergies.
- Fundus**: Fundus section with input fields for OD and OS, and dropdown menus for Vitreous, Retina, and Nerves.
- IOP, CCT, Gonioscopy**: Intraocular Pressure, Central Corneal Thickness, and Gonioscopy section with input fields for OD, OS, and CCT, and dropdown menus for Gonio.

- Once electronic letter has been uploaded or all the information is manually entered, click on the red button **'Save Changes before proceeding'**.



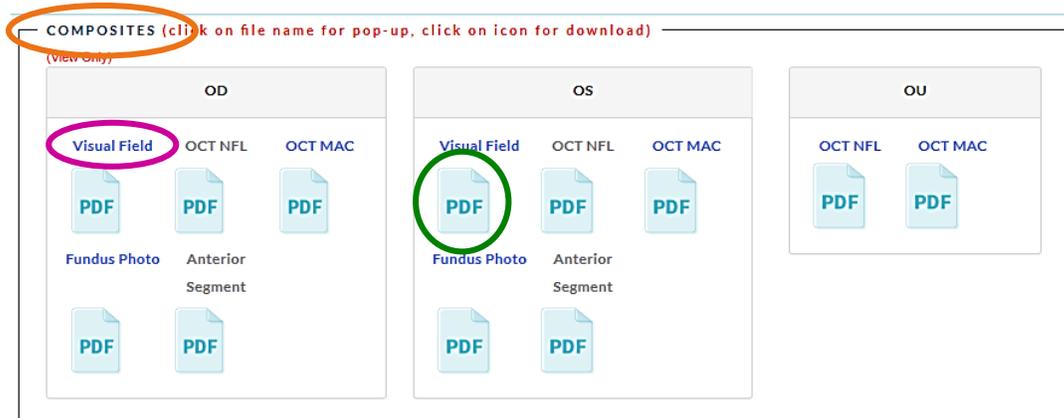
**\*Changes must be saved before proceeding even if you don't enter anything in the drop-down menu\***

5. **Imaging:** Upload photos (VF, OCT, Fundus) in the following section via drag-and-drop or by clicking on the **orange upload button**. If you wish to upload additional pictures, please use the 'Upload referral letters/supporting files' section in Step 3, section **Letter**. \*Don't forget to '**Save changes before proceeding**' again.\*



The following section – **Composites**, allow you to view and download previous VFs, OCTs or Fundus photos:

Click on **file name** for a pop-up view or click on **icon** to download the file to your computer



6. **Impressions:** Indicate referring doctor impressions and referring doctor's proposed medical plan in the area provided.

REFERRING DOCTOR IMPRESSION	POAG
REFERRING DOCTOR PROPOSED MEDICAL PLAN	start Lumigan OU whs

7. **Referral Detail:** Click on **Save and proceed** > **Sign Chart** > choose from the three referral options below:

Option 1. Click on **"Refer to first available ophthalmologist"** for fastest referral. The chart would go to any OMD across Canada.

REFERRAL DETAIL

Step:1 

Step:2  Signed By: Mahta Rasouli  
Signed On: 2/21/2019 3:33:25 PM Please enter three or more characters of the last name. If the name doesn't appear in the line, click on "Refer Patient Chart" to invite the OD/OMD to the program

Step:3  [OR refer to a specific OMD]   

Option 2. Refer to an **ophthalmologist of your choice:**

- a. choose **province** >
- b. **search their name** on the drop-down search box >
- c. Click on **'Refer Patient Chart'**

REFERRAL DETAIL

Step:1 

Step:2  Signed By: Mahta Rasouli  
Signed On: 4/29/2019 9:55:49 AM Please enter three or more characters of the last name. If the name doesn't appear in the line, click on "Refer Patient Chart" to invite the OD/OMD to the program

Step:3  [OR refer to a specific OMD]   

▼ Ophthalmologist Review

**Option 3.** If the doctor currently does not work with us, and you cannot find their name in the drop-down menu, click on **'Refer Patient Chart'** anyway. The pop-up shown below will appear to **invite a consultant ophthalmologist of your choice** to review your consult:

- a.** populate this pop-up with the Consultant doctor's **name, email** and/or **fax number** >
- b.** Click on **'Send Fax'** to submit patient referral.

**Share Patient Chart** X

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Doctor Name:

Email:

Fax:   
(E.g., [±1 780 000 0000](#))

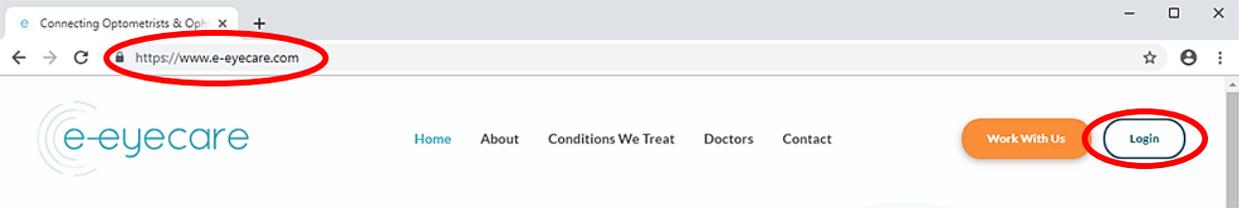
**When registering for an account, please use the same e-mail address provided here.**

Send FaxCancel

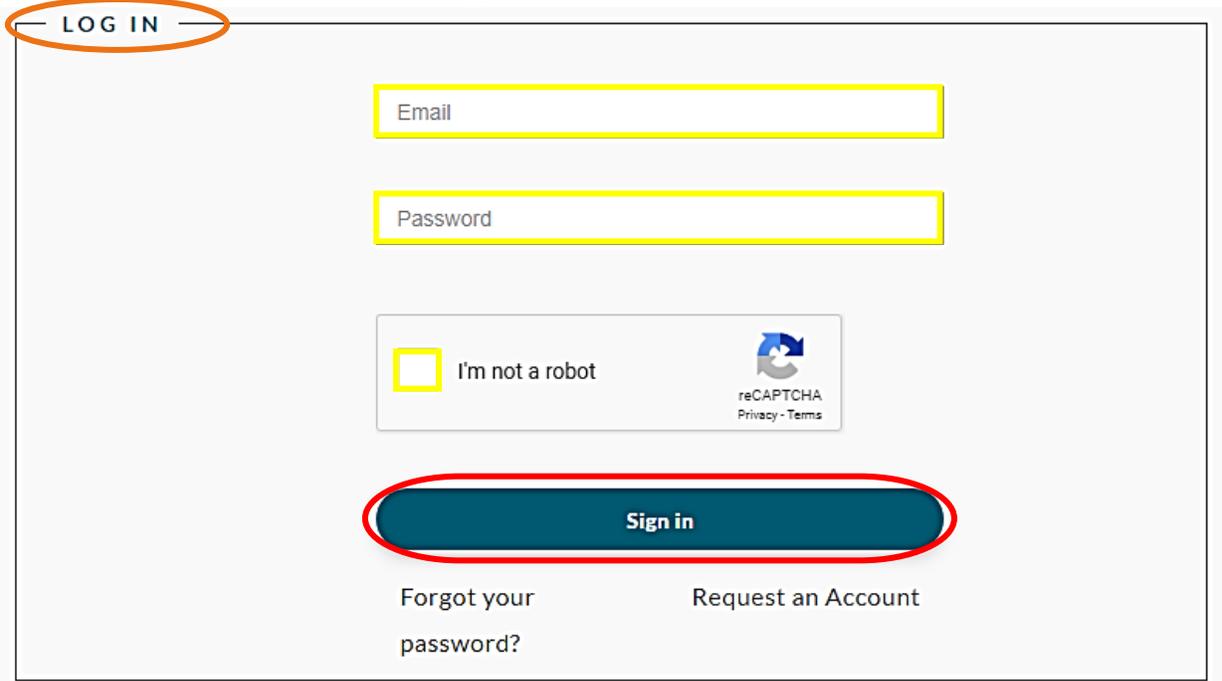
The software will automatically generate an email and/or fax notifying the Consultant ophthalmologist of a patient chart waiting for review.

# Ophthalmologists: How to reply to a consult

1. Upon receiving a notification for consult, **please go to e-eyecare.com.**



2. **Log-in** with your credentials > click in **'I'm not a robot'** > **Sign-in.**



3. **Select patient chart** on your Dashboard, with a status *'Pending'* to review.

Case/Chart No	Patient Name	Date of Referral	Status	Date of Review
NL-11111-0002	aaaa AAAA	4/4/2019 2:34:09 PM	Pending	
NU-555555555555-0001	aatest AATEST	4/5/2019 12:20:20 AM	Pending	
AB-333333333333-0003	aaa AAA	4/4/2019 12:20:51 AM	Pending	
BC-111111111111-0002	John SmithTest	4/4/2019 12:20:30 AM	Pending	

4. **Provide feedback** once the patient chart has been reviewed. There are 3 mandatory steps in providing feedback:
  - a. Depending on your province of practice, please click on whether you have viewed VF or OCT (if your province compensates you for reviewing this information). In addition, indicate if you have met the satisfactory standards of a consultation and whether you want to send the chart for billing. Please choose the dates, and our billing personnel will submit the chart and associated Codes on your behalf. >

**▼ Ophthalmologist Review**

a. {

Reviewed VF No  Yes  Date Reviewed

Reviewed OCT No  Yes  Date Reviewed

Submit this chart for billing? No  Yes

}

- b. Provide Consultant **OMD Impressions** and a proposed **treatment plan** >

b. {

Consultant OMD Impression

Consultant OMD Treatment Plan

Notes for referring doctor (Not included in referral letters)

}

If you need further information or would like to write your notes that do not reflect in the final patient letter, please write the information in **“Notes for referring doctor”**.

- c. Click on **Save and proceed**. If satisfied with the chart, **sign & complete review** along with **date** of review

c. {

[OR]

Reviewed On

[OR]

Refer To

}

- If you need further information to provide feedback, under **Ophthalmologist review**:
  - a. Indicate what is necessary in the **'Notes for referring doctor'**
  - b. Return the chart for correction by clicking on the purple circled **'Return for Correction'** button.

▼ Ophthalmologist Review

Reviewed VF No  Yes Date Reviewed

Reviewed OCT No  Yes Date Reviewed

Submit this chart for billing? No  Yes

Consultant OMD Impression

Consultant OMD Treatment Plan

a. Notes for referring doctor (Not included in referral letters)

b.  [OR]  [OR]

Reviewed On

Refer To

- If for any reason, you would like to refer the patient to a different OMD who works with e-eyecare, under **Ophthalmologist Review** section:
  - a. Click on **'Refer to other e-eyecare OMD'**
  - b. Click on the **drop-down menu** to either refer to the fist available OMD or the consultant OMD of your choice

▼ Ophthalmologist Review

Reviewed VF No  Yes Date Reviewed

Reviewed OCT No  Yes Date Reviewed

Submit this chart for billing? No  Yes

Consultant OMD Impression

Consultant OMD Treatment Plan

Notes for referring doctor (Not included in referral letters)

[OR]  [OR] a.

Reviewed On

Refer To

b.

5. **Follow-up recommendations.** This last section followed by Ophthalmologist review allows consultant ophthalmologists to indicate their follow-up recommendations:

Option 1. To follow-up with the referring doctor,

- a. Select '**See referring doctor and telemedicine f/u**'
- b. Select period of expected follow-up,
- c. Click on '**Reply to referring doctor**' to submit follow up recommendation and notify referring doctor that the chart is completed

The screenshot shows the 'F/U RECOMMENDATIONS' section. A red circle labeled 'a.' highlights the radio button for 'See referring doctor and telemedicine f/u'. A red box labeled 'b.' encompasses the follow-up period options: '1 Wk', '1 Month', '4 Months', '6 Months', '9 Months', and '1 Year', along with an 'Other' option and a text input field. A red circle labeled 'c.' highlights the 'Reply to referring doctor' button.

Option 2. See the patient in person by:

- a. selecting '**Refer to my clinic to see patient**'
- b. '**Send letter to my clinic**' to schedule a follow-up

The screenshot shows the 'Refer to my clinic to see patient' option. A red circle labeled 'a.' highlights the radio button. A red circle labeled 'b.' highlights the 'Send letter to my clinic' button.

Option 3. Refer the patient to a different ophthalmologist in the community for an in-person visit by:

- a. clicking on '**Refer to other OMD**',
- b. Select their *province* and type in their *name*,
- c. Lastly, '**Refer to other OMD**'

The screenshot shows the 'Refer to other OMD' option. A red circle labeled 'a.' highlights the radio button. A red box labeled 'b.' encompasses the 'Select' dropdown menu, a text input field for the name, and a '+' button. A red circle labeled 'c.' highlights the 'Refer to other OMD' button.

If the OMD of your choice is not in our database, click on the '+' sign to enter their information and add them to our system. Then click on 'Refer to other OMD'

# FAQ

## Do I have to fill out the demographic section every time I create a chart for a patient?

No, only new patients require 'Demographic' profile filled out first before proceeding to create a chart. New charts may be created for existing patients on the *Dashboard* by simply searching for their **Health Care No.** and **Province** > **'Create New Chart'**.

## Could I upload anything else other than letter or images?

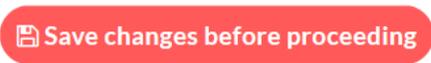
Yes, you may upload any other supporting files in the review of this consult under the **'Upload referral letter/other supporting files'** section. This option allows you to upload files that are in the form of the indicated supported file formats.

## What if I don't have an EMR system, could I still use this software? Do I have to upload an electronic letter?

Yes. Our system is an online software, so, you do not need any special hardware or software to use it, or any download storage system.

Regarding transferring the patient's information, if you don't want to use an electronic letter, when creating a patient chart, you have the option to enter this information manually. Below the Upload a referral letter section, there is a drop-down section titled **POHx/PMHx – Meds – Clinical Exam**.

## I can't upload images after uploading a letter/providing patient information. What can I do?

Please make sure that you have clicked on the  button after uploading a referral letter or filling out the POHx/PMHx – Meds – Clinical Exam section. You will not be able to proceed unless prior information has been saved.

## How could I access previous images/photos that have already been uploaded?

You can access these images by opening a previous chart or while creating a new one. Scroll down to the 'Composites' section and either click on the file name for a pop-up or the icon to download the images. Previous images can be viewed by scrolling down from the most recent to the oldest photo.

## Will I have the option of choosing who will review my patient's chart?

Yes. You have three options under 'Referral Detail':

- (1) **'Refer to the first available ophthalmologist'** for the fastest service
- (2) Refer to a specific OMD by searching for the ophthalmologist name and province

- (3) If they currently don't work with us, invite them to review the patient chart through the software with their name, email and fax number.

### How do I refer a patient chart to a specific ophthalmologist?

Under referral detail once you have clicked on **Save and proceed > Sign Chart**:

- (1) Choose the OMDs province of practice
- (2) Click on the drop-down and search for their name, click on OMD name
- (3) Finally, click on **Refer Patient Chart** and the OMD will receive a communication via email and fax notifying them of a patient chart awaiting review. They have 4 business days to reply to a consult.

### How can I invite an ophthalmologist to use the software?

To invite an OMD to review a consult through e-eyecare, under referral detail:

- (1) Click on **Save and proceed**,
- (2) **Sign chart**,
- (3) Click on the drop-down and type OMD name, and click on **Refer Patient Chart**.
- (4) This will generate a pop-up wherein you must provide OMD *name, email and/or fax number*. The OMD will receive an email and/or fax notifying them of a patient chart awaiting review.

### When should I expect a reply from the consultant OMD?

Our aim is to have the charts reviewed and completed by our Consultant ophthalmologists within four business days of the referral being made. If the Consultant ophthalmologist is not available for any reason, the chart will be sent back to the referral pool to be seen by the first available Consultant.

### What happens when the Consultant OMD I chose is not available?

If for any reason the Consultant OMD is not available, the chart will be returned to the referral pool and will be seen by the first available Consultant. You will be notified of this change through email.



Join us in providing high quality ocular care  
for all Canadians at [e-eyecare.com](http://e-eyecare.com)

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