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# Acuitas Version 2.0.80.1

## Highlights

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JANUARY 29, 2018  
OCUCO LIMITED

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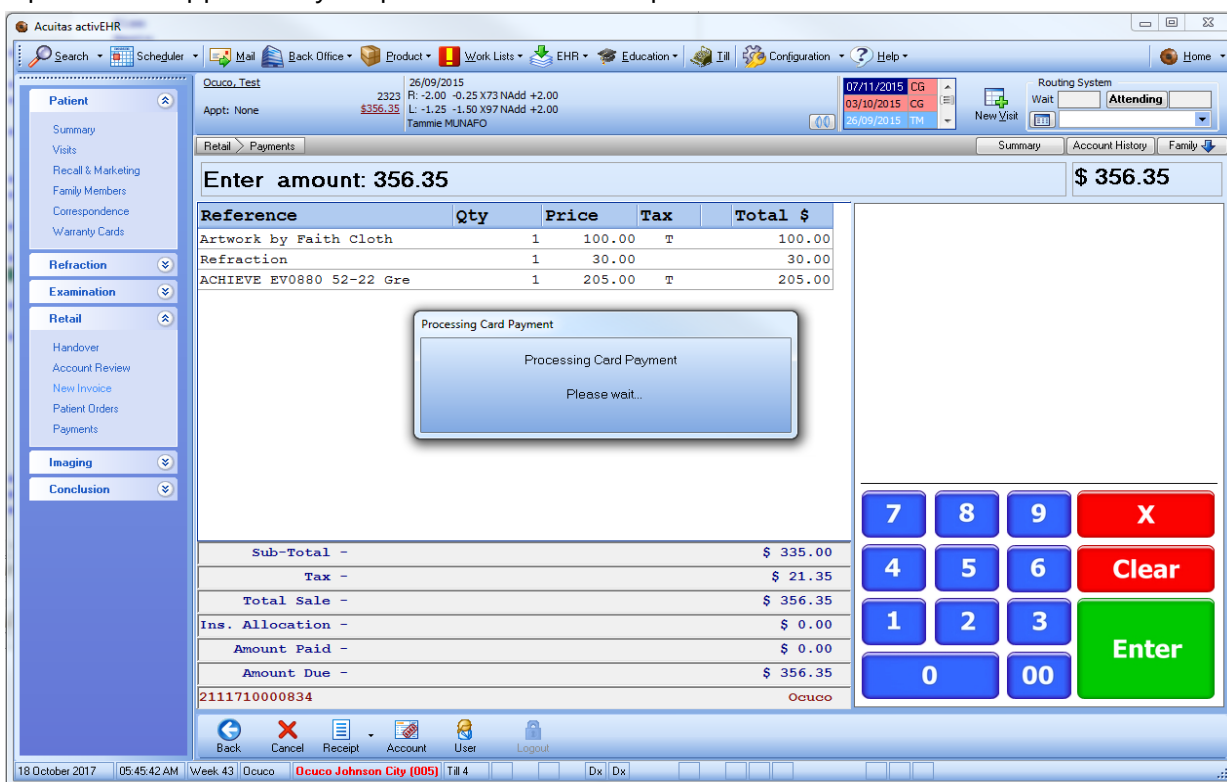
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# 1 Integrated Card Transactions

There is a new sub-module in the Till, which has a set of features that empower Acuitas with the ability to perform card payments, refunds and end of day operations, such as card payments reconciliation. It works as an integrated solution to tender card payments, to reach a broader audience while paying a sale in Acuitas. Also, facilitating the till reconciliation at closure.

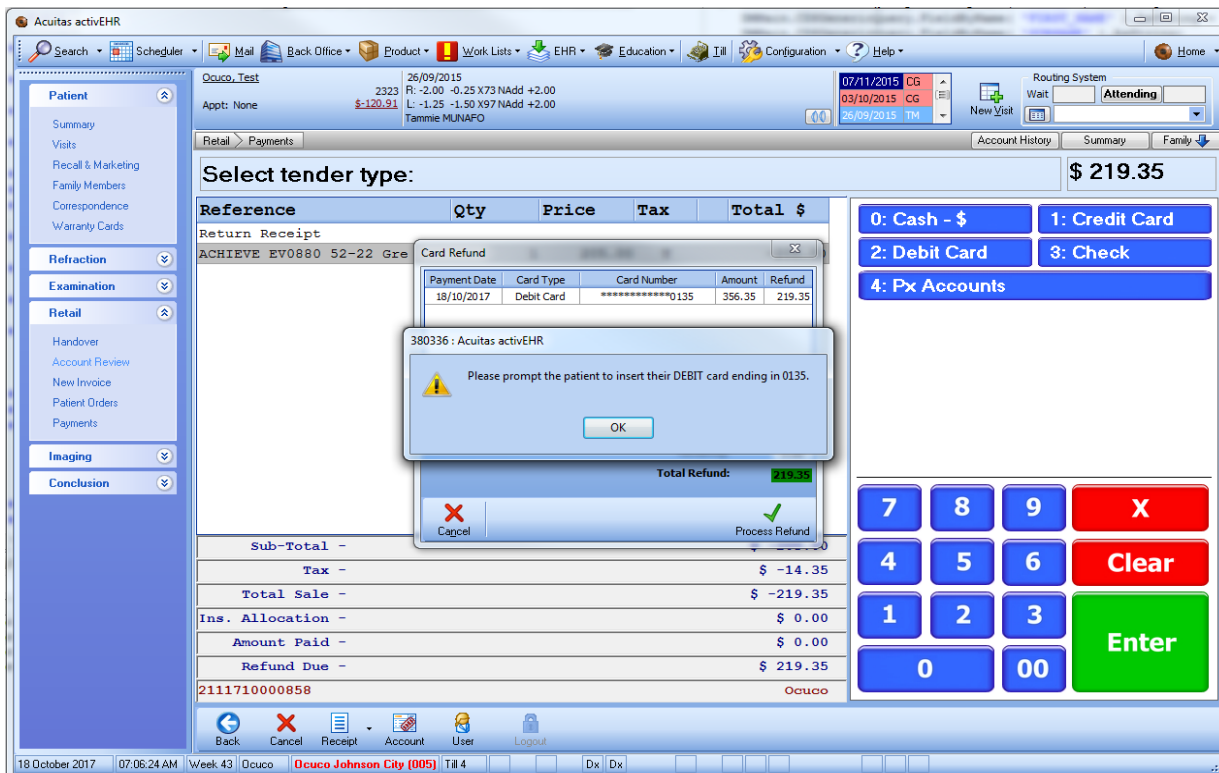
## Features

- Credit and debit card payment requests, allowing users to tender sales at the till by using either credit or debit cards (multiple formats supported, such as VISA, MASTERCARD, AMEX, INTERACT, etc.).
- Operations supported by Chip and Pin or card swipe.



- Payment cancellation, removes the payment from the daily batch, ensuring the patient is not charged after a sale canceled on the same day.

- Refunds, made after the daily batch is closed - where the return was completed in Acuitas, now credit the card type selected from the initial payment transaction\*.



Acuitas activEHR

26/09/2015  
 2323 R: -2.00 -0.25 X73 NAdd +2.00  
 \$-120.91 L: -1.25 -1.50 X97 NAdd +2.00  
 Tammie MUNAFO

07/11/2015 CG  
 03/10/2015 CG  
 26/09/2015 TM

Routing System  
 Wait: [ ] Attending

Account History Summary Family

Select tender type: \$ 219.35

Reference	Qty	Price	Tax	Total \$
Return Receipt				
ACHIEVE EV0880 52-22 Gre				

Card Refund

Payment Date	Card Type	Card Number	Amount	Refund
18/10/2017	Debit Card	****0135	356.35	219.35

390336 : Acuitas activEHR

Please prompt the patient to insert their DEBIT card ending in 0135.

OK

Total Refund: 219.35

Cancel Process Refund

0: Cash - \$ 1: Credit Card  
 2: Debit Card 3: Check  
 4: Px Accounts

7 8 9 X  
 4 5 6 Clear  
 1 2 3 Enter  
 0 00

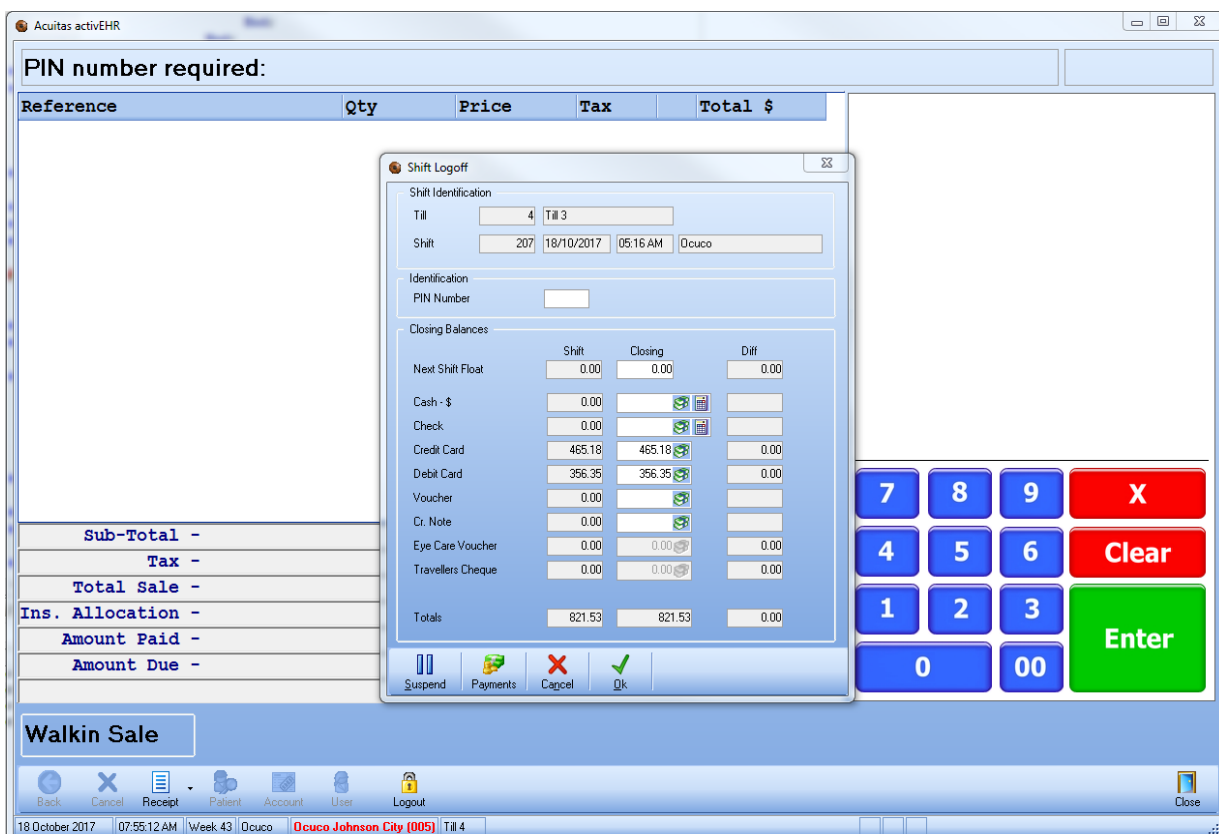
Sub-Total -  
 Tax - \$ -14.35  
 Total Sale - \$ -219.35  
 Ins. Allocation - \$ 0.00  
 Amount Paid - \$ 0.00  
 Refund Due - \$ 219.35

2111710000858 OCUCO

Back Cancel Receipt Account User Logout

18 October 2017 07:06:24 AM Week 43 Ocucu Ocucu Johnson City [005] Till 4 Dx Dx

- End of Day Operations, obtaining the current daily batch from the card reader, and auto-balance the Acuitas sales tendered by card, to allow corrections, cancel payments, link payments to sales, etc.



Acuitas activEHR

PIN number required:

Reference	Qty	Price	Tax	Total \$

Shift Logoff

Shift Identification  
 Till: 4 Till 3  
 Shift: 207 18/10/2017 05:16 AM Ocucu

Identification  
 PIN Number: [ ]

Closing Balances

	Shift	Closing	Diff
Next Shift Float	0.00	0.00	0.00
Cash - \$	0.00		
Check	0.00		
Credit Card	465.18	465.18	0.00
Debit Card	356.35	356.35	0.00
Voucher	0.00		
Cr. Note	0.00		
Eye Care Voucher	0.00	0.00	0.00
Travellers Cheque	0.00	0.00	0.00
Totals	821.53	821.53	0.00

Suspend Payments Cancel OK

7 8 9 X  
 4 5 6 Clear  
 1 2 3 Enter  
 0 00

Walkin Sale

Back Cancel Receipt Patient Account User Logout

18 October 2017 07:55:12 AM Week 43 Ocucu Ocucu Johnson City [005] Till 4

## 2 Revenue Cycle Report

A new Revenue Cycle report has been added to provide a sales report net of insurance discount/write-off and displaying the breakdown of sales and payments made both as insurance and related to the patient. It also includes a display of adjustments made to sales after the fact, either insurance adjustments (pre- or post-submission) and till debt write-offs.

From Date : 01/02/2018  
 To Date : 15/02/2018  
 Practice/Region :

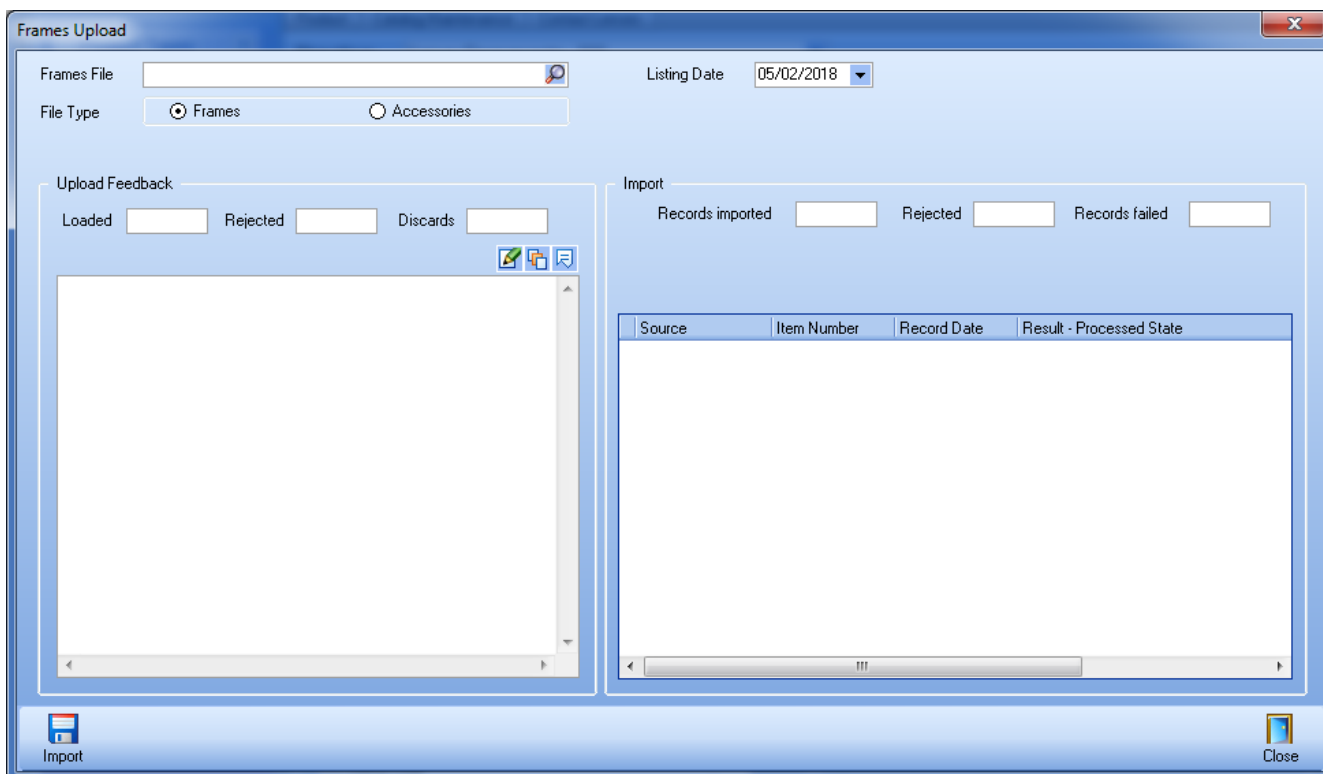
### Revenue Cycle Report

Ocuco Johnson City (005)  
 Date : 15/02/2018

	Units	Insurance			Patient			Total		
		Net Sales	Adjustments	Payments	Net Sales	Adjustments	Payments	Net Sales	Adjustments	Payments
<b>Frame Revenue</b>										
<i>Wing Contact</i>	-1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<i>Clear Vision</i>	3	0.00	0.00	0.00	546.21	0.00	435.84	546.21	0.00	435.84
<b>Total Frame Revenue</b>	2	0.00	0.00	0.00	546.21	0.00	435.84	546.21	0.00	435.84
<b>Lens Revenue</b>										
Single Vision	8	0.00	0.00	0.00	1,733.40	0.00	834.60	1,733.40	0.00	834.60
<b>Total Lens Revenue</b>	8	0.00	0.00	0.00	1,733.40	0.00	834.60	1,733.40	0.00	834.60
<b>Contact Lens Revenue</b>										
<i>Wing Contact</i>	6	0.00	0.00	0.00	291.04	0.00	222.56	291.04	0.00	222.56
<b>Total Contact Lens Revenue</b>	6	0.00	0.00	0.00	291.04	0.00	222.56	291.04	0.00	222.56
<b>Accessory Revenue</b>										
<i>Wing Contact</i>	1	0.00	0.00	0.00	107.00	0.00	107.00	107.00	0.00	107.00
<b>Total Accessory Revenue</b>	1	0.00	0.00	0.00	107.00	0.00	107.00	107.00	0.00	107.00
<b>Fee Revenue</b>										
<i>Wing Contact</i>	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contact Lens Service (Specialty)	1	0.00	0.00	0.00	65.00	0.00	65.00	65.00	0.00	65.00
<i>Wing Contact</i>	1	0.00	0.00	0.00	78.75	0.00	78.75	78.75	0.00	78.75
<b>Total Fee Revenue</b>	2	0.00	0.00	0.00	143.75	0.00	143.75	143.75	0.00	143.75
<b>Sunglasses Revenue</b>										
Clearvision	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Marchon	8	0.00	0.00	0.00	928.76	0.00	1,311.82	928.76	0.00	1,311.82
Mcgee Group	2	0.00	0.00	0.00	98.44	0.00	196.88	98.44	0.00	196.88
Safilo	1	0.00	0.00	0.00	174.41	0.00	174.41	174.41	0.00	174.41
<b>Total Sunglasses Revenue</b>	11	0.00	0.00	0.00	1,201.61	0.00	1,683.11	1,201.61	0.00	1,683.11
<b>Extra Revenue</b>										
<i>Wing Contact</i>	4	0.00	0.00	0.00	104.00	0.00	52.00	104.00	0.00	52.00
<b>Total Extra Revenue</b>	4	0.00	0.00	0.00	104.00	0.00	52.00	104.00	0.00	52.00
<b>Warranty Revenue</b>										

### 3 Catalog Import of Frames and Accessories

A catalog import facility has been added to allow the importing of product catalog files in CSV (Comma Separated Values) format. This supports the import of frames, sunglasses, accessories, solutions, and consumables.



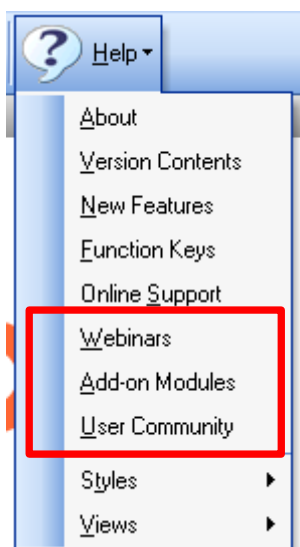
## 4 New Help / User Community Page

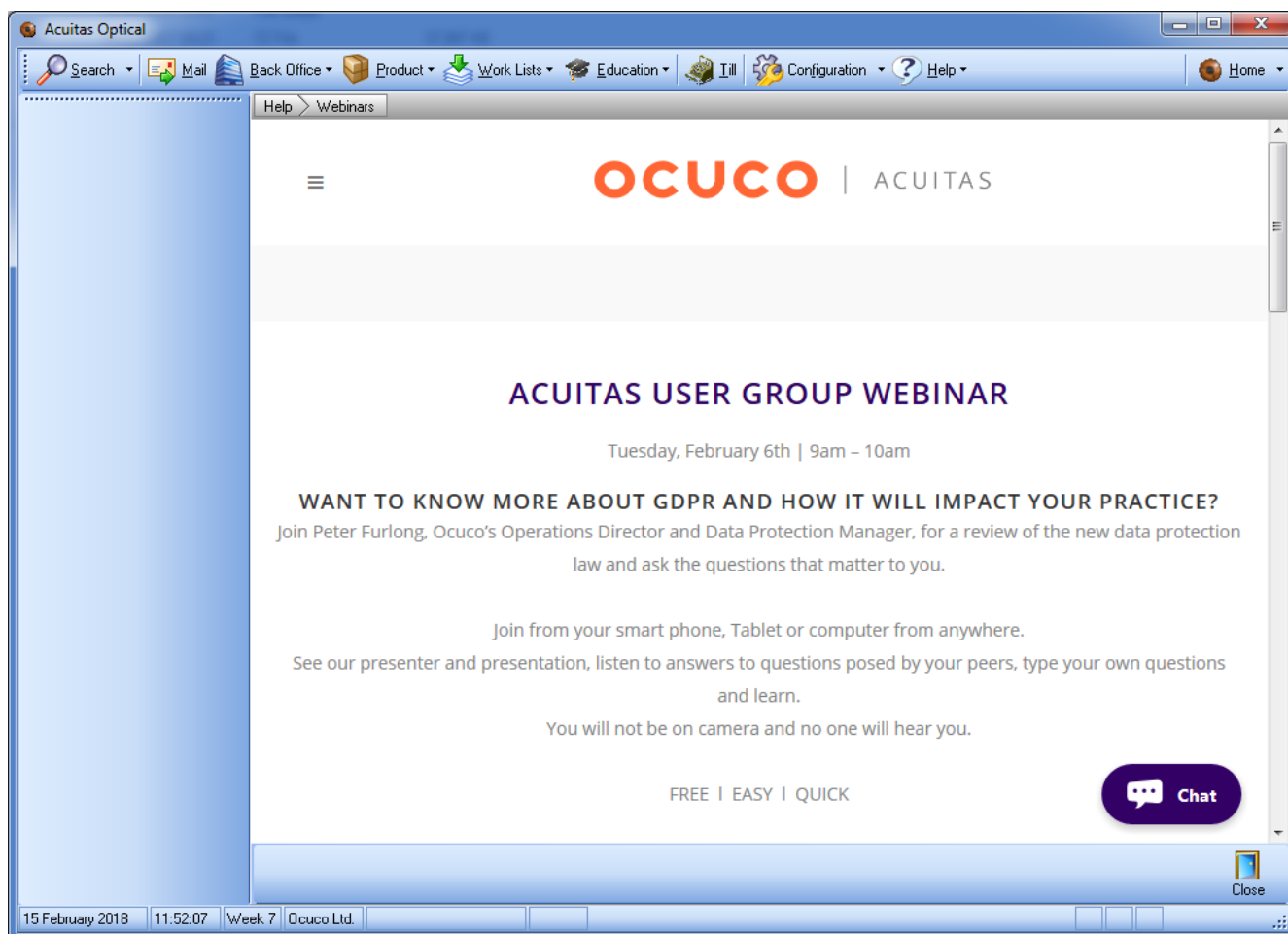
A set of new links have been added to the Help menu to allow users easy access to the following web pages:

Acuitas User Community: this new web page informs users about the upcoming release and new features.

Acuitas Add-on Modules: users can view and order the available Add-on features for the application.

Webinars: this web page provides the user with information about upcoming webinars and a form to register as an attendee.





Acuitas Optical

Search Mail Back Office Product Work Lists Education I'll Configuration Help Home

Help Webinars

OCUCO | ACUITAS

## ACUITAS USER GROUP WEBINAR

Tuesday, February 6th | 9am - 10am

**WANT TO KNOW MORE ABOUT GDPR AND HOW IT WILL IMPACT YOUR PRACTICE?**  
Join Peter Furlong, Ocucos Operations Director and Data Protection Manager, for a review of the new data protection law and ask the questions that matter to you.

Join from your smart phone, Tablet or computer from anywhere.  
See our presenter and presentation, listen to answers to questions posed by your peers, type your own questions and learn.  
You will not be on camera and no one will hear you.

FREE | EASY | QUICK

Chat

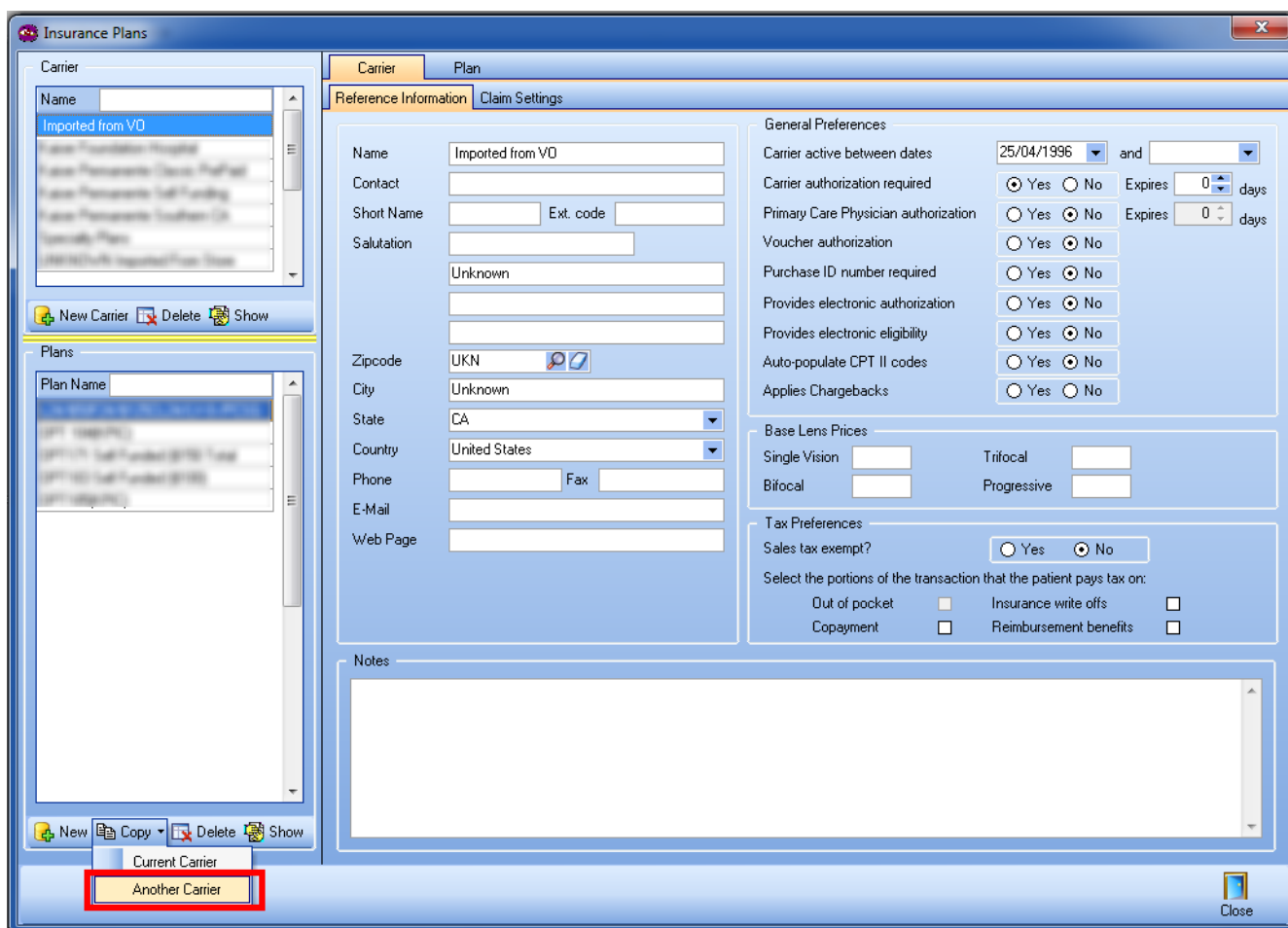
Close

15 February 2018 11:52:07 Week 7 | Ocucos Ltd.



## 5 Allow Copying of Plan to Another Carrier

(United States only) The insurance maintenance screen, where the carriers and plans are maintained, contained a plan copy function to allow for an existing plan to be copied and a new plan created using it as the default for its content. This feature expands the copy function to include a new option to allow the user to copy the selected plan to another carrier.



The screenshot shows the 'Insurance Plans' application window. The 'Carrier' tab is active, and the 'Plan' sub-tab is selected. The 'Reference Information' section contains the following fields:

- Name: Imported from VD
- Contact: [Empty]
- Short Name: [Empty] Ext. code: [Empty]
- Salutation: [Empty]
- Zipcode: UKN
- City: Unknown
- State: CA
- Country: United States
- Phone: [Empty] Fax: [Empty]
- E-Mail: [Empty]
- Web Page: [Empty]

The 'General Preferences' section includes the following options:

- Carrier active between dates: 25/04/1996 and [Empty]
- Carrier authorization required:  Yes  No Expires: 0 days
- Primary Care Physician authorization:  Yes  No Expires: 0 days
- Voucher authorization:  Yes  No
- Purchase ID number required:  Yes  No
- Provides electronic authorization:  Yes  No
- Provides electronic eligibility:  Yes  No
- Auto-populate CPT II codes:  Yes  No
- Applies Chargebacks:  Yes  No

The 'Base Lens Prices' section includes the following options:

- Single Vision: [Empty] Trifocal: [Empty]
- Bifocal: [Empty] Progressive: [Empty]

The 'Tax Preferences' section includes the following options:

- Sales tax exempt?:  Yes  No
- Select the portions of the transaction that the patient pays tax on:
  - Out of pocket:  Insurance write offs:
  - Copayment:  Reimbursement benefits:

The 'Notes' section is empty. The 'Carrier' list on the left shows 'Imported from VD' selected. The 'Plan' list on the left shows several plans. The 'Current Carrier' and 'Another Carrier' buttons are highlighted at the bottom.

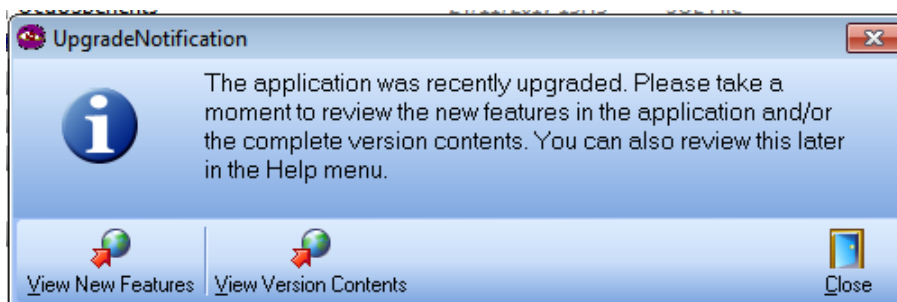
## 6 Remakes at X% - Remakes from Original Dispense

Functionality was added to allow the business to charge a patient a percentage of a remake, or of a product upgrade which was changed as part of that same remake operation. This charge is controlled by the configuration of the Remake reasons.

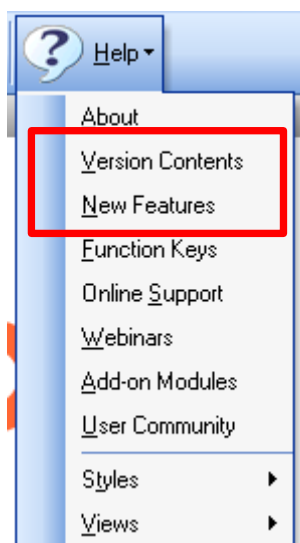
As part of the referred changes, the underlying rule has been modified to simplify the issues surrounding complex dispense and remakes of remakes to obtain the price for the calculation from the original dispense.

## 7 Upgrade Notifications and Documentation in the Application

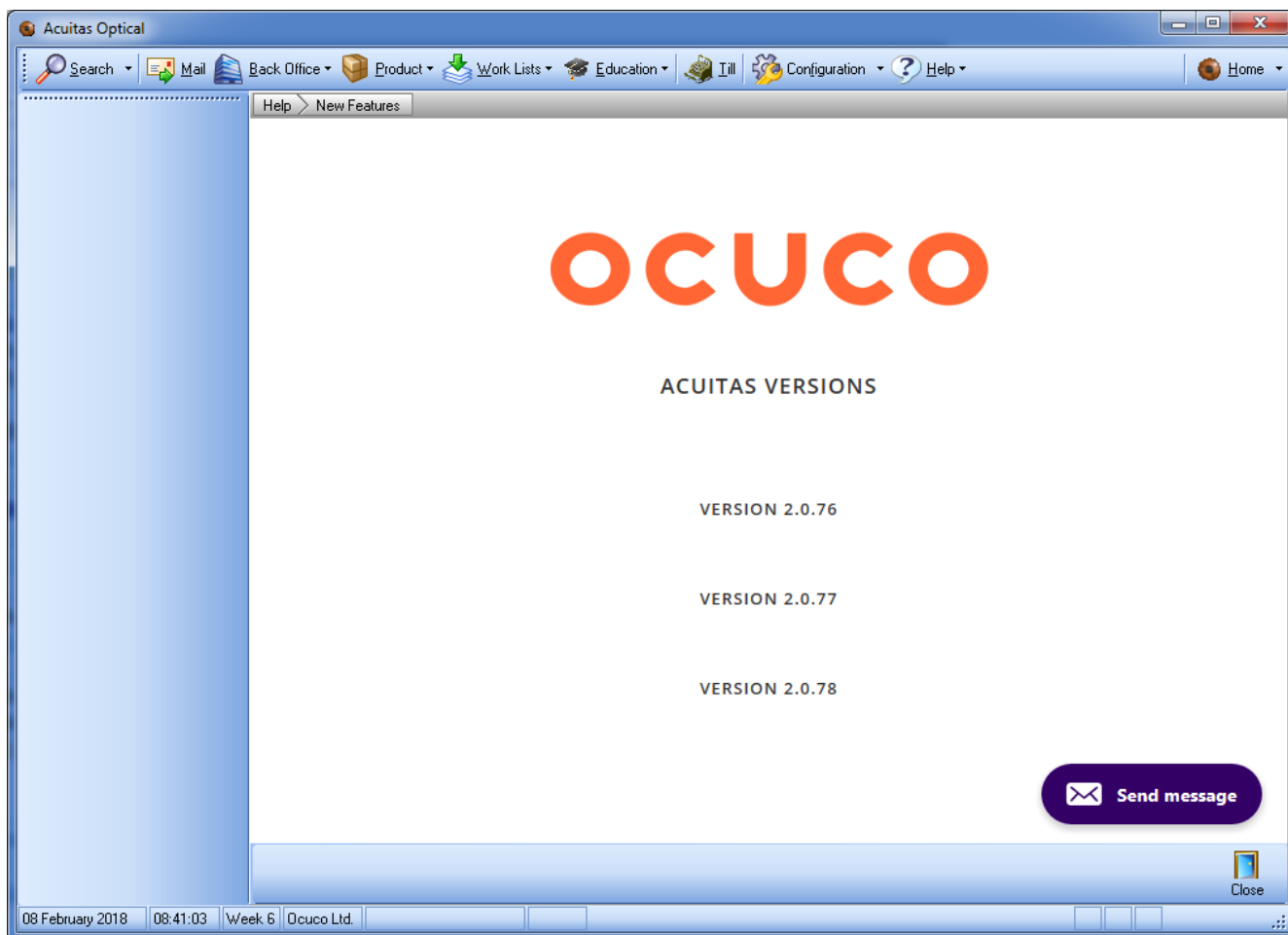
A new feature has been added to the application which (a) informs each user individually of a version upgrade on their first use of the application after the upgrade and (b) provides links to two published documents about the version upgrade; a release highlights and a version contents document.



Links to these documents are also included in the Help menu.



When one of the options is selected, the page is displayed within Acuitas.



## 8 Survey SMS - Survey Configuration

A new function has been added to allow the business to send Survey SMS text to patients to obtain feedback relating to their visits and products they purchased. This change relates to the configuration options added in the system where the business can set up templates, and delivery settings for up to three survey types, Exam Survey, Sales Survey, and Sales Follow up Survey.

**Survey Configuration** ✕

General Settings

Do you wish to survey patients?

Only survey patients aged  and over

Communication Options

**Exam Survey**

<input checked="" type="checkbox"/> Survey Active?	Send Message After <input type="text" value="1"/>	Do Not Repeat Within <input type="text" value="1"/> months	Message Content <input type="text" value="Eye Exam Survey"/>
	<input checked="" type="radio"/> Minutes <input type="radio"/> Hours <input type="radio"/> Days		

**Sales Survey**

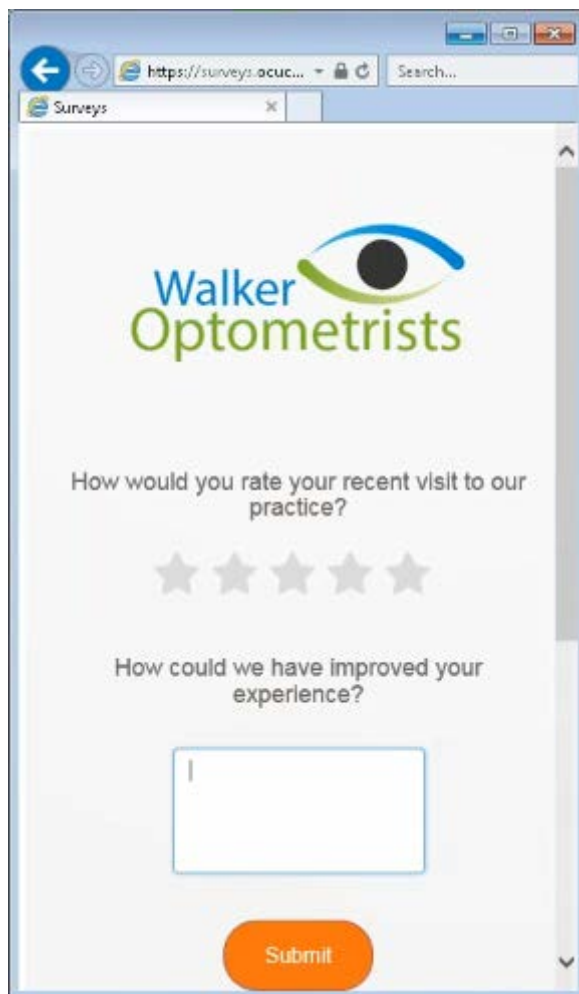
<input checked="" type="checkbox"/> Survey Active?	Send Message After <input type="text" value="2"/>	Do Not Repeat Within <input type="text" value="1"/> months	Message Content <input type="text" value="Sales Survey"/>	
	<input checked="" type="radio"/> Minutes <input type="radio"/> Hours <input type="radio"/> Days			<b>Apply To Types</b> <input checked="" type="checkbox"/> Spectacles <input checked="" type="checkbox"/> Sunglasses <input checked="" type="checkbox"/> RX Sunglasses <input type="checkbox"/> Hearing <input type="checkbox"/> Contact Lenses <input checked="" type="checkbox"/> Frames (No RX)

**Sales Followup Survey**

<input checked="" type="checkbox"/> Survey Active?	Send Message After <input type="text" value="3"/>	Do Not Repeat Within <input type="text" value="1"/> months	Message Content <input type="text" value="Experience Survey"/>	
	<input checked="" type="radio"/> Minutes <input type="radio"/> Hours <input type="radio"/> Days			<b>Apply To Types</b> <input checked="" type="checkbox"/> Spectacles <input checked="" type="checkbox"/> Sunglasses <input checked="" type="checkbox"/> RX Sunglasses <input checked="" type="checkbox"/> Hearing <input checked="" type="checkbox"/> Contact Lenses <input checked="" type="checkbox"/> Frames (No RX)

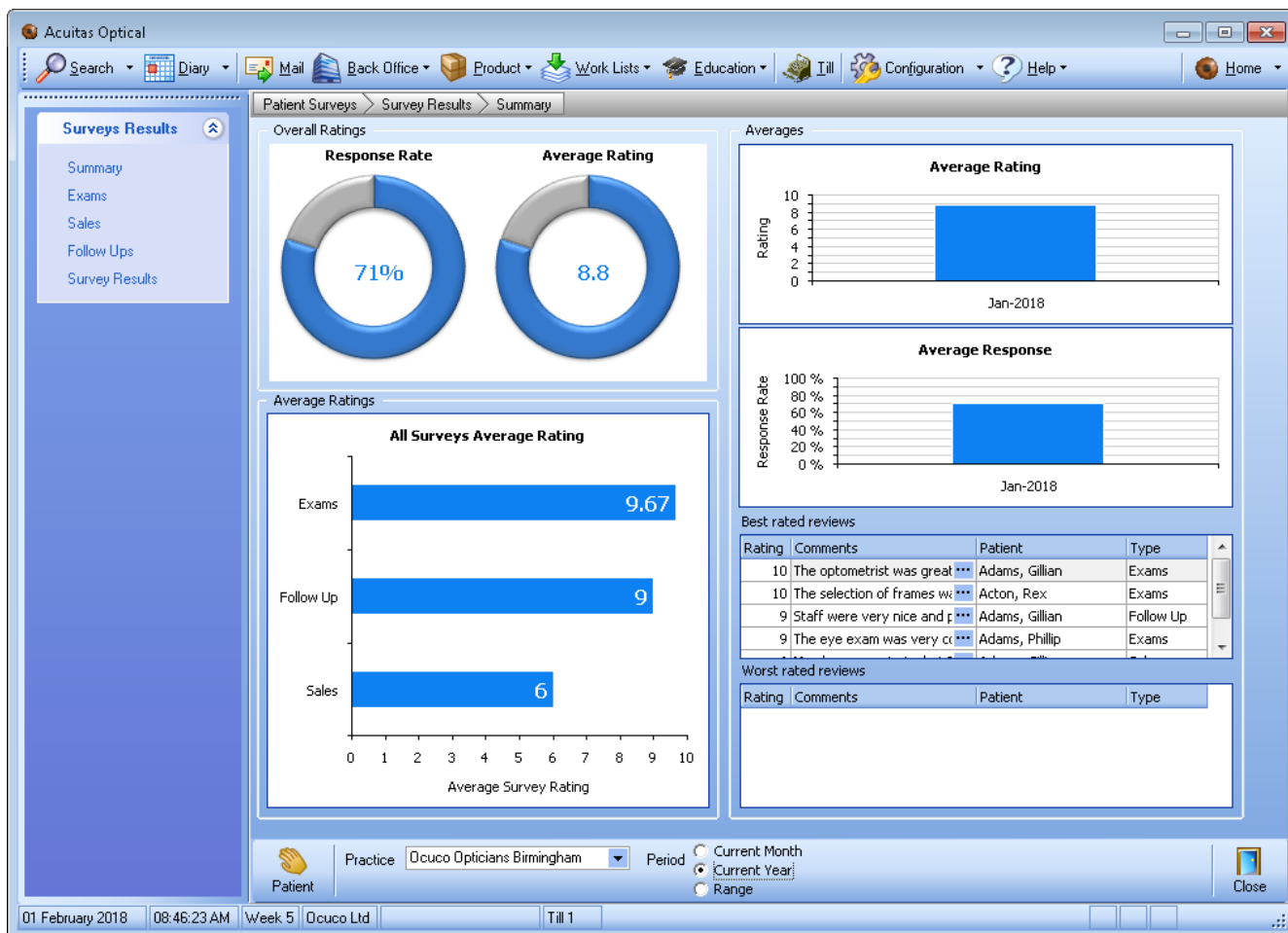
✕ Cancel
✓ Ok

The Survey page is meant to be minimalist and clean, so that the patient can fill it up quickly, improving the response rate of the surveys.



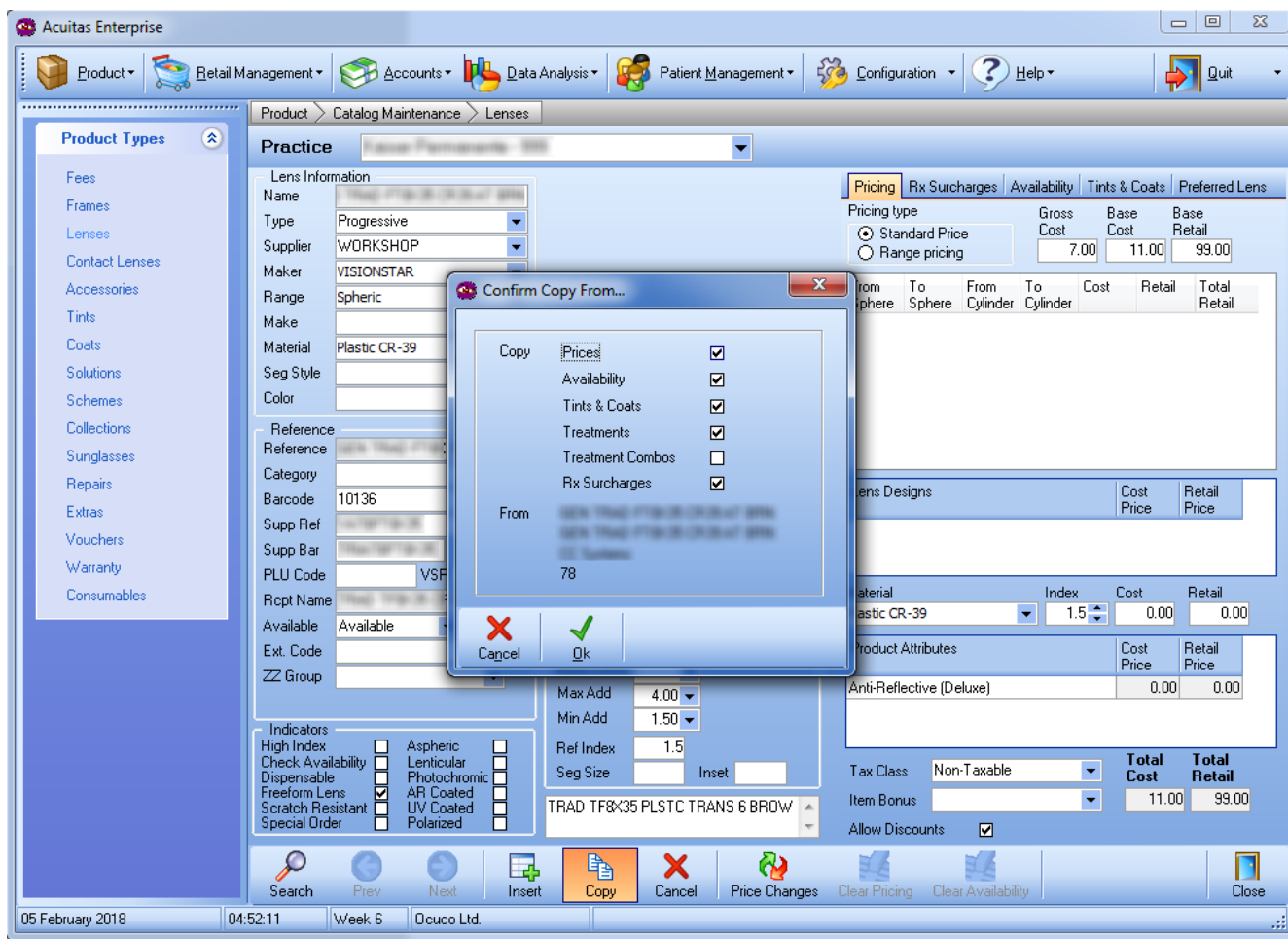
The screenshot shows a web browser window with the URL <https://surveys.ocuco...>. The page features the Walker Optometrists logo, which includes a stylized eye icon. Below the logo, the text reads "Walker Optometrists". The survey content includes the question "How would you rate your recent visit to our practice?" followed by five grey stars. Below this is the question "How could we have improved your experience?" and a text input field. At the bottom of the form is an orange "Submit" button.

Within Acuitas, the user can monitor different figures in the Survey Dashboard, such as the Response Rate, Average Ratings, monthly comparisons, etc.



## 9 Catalog Copy to Copy Lens Surcharges

This change to the 'Copy' button functionality, on the Lenses Catalog, takes into consideration the Rx Surcharges. Therefore, there is no need to manually configure all surcharges as they are now included in the copy.



The screenshot displays the Acuitas Enterprise software interface. A 'Confirm Copy From...' dialog box is open, showing a list of attributes to be copied from a source lens to a target lens. The 'Copy' button in the background interface is highlighted.

**Confirm Copy From...**

Copy	Prices	
<input checked="" type="checkbox"/>	Prices	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Availability	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Tints & Coats	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Treatments	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Treatment Combos	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Rx Surcharges	<input checked="" type="checkbox"/>

From: 10136 TRAD TF8X35 PLSTC TRANS 6 BROW 78

Buttons: Cancel, Ok

**Background Interface Details:**

- Product: Catalog Maintenance > Lenses
- Practice: Vision Performance - 888
- Lens Information: Name, Type (Progressive), Supplier (WORKSHOP), Maker (VISIONSTAR), Range (Spheric), Make, Material (Plastic CR-39), Seg Style, Color
- Reference: Reference, Category, Barcode (10136), Supp Ref, Supp Bar, PLU Code (VSP), Rcpt Name, Available (Available), Ext. Code, ZZ Group
- Indicators: High Index, Check Availability, Dispensable, Freeform Lens, Scratch Resistant, Special Order, Aspheric, Lenticular, Photochromic, AR Coated, UV Coated, Polarized
- Pricing: Pricing type (Standard Price), Gross Cost (7.00), Base Cost (11.00), Base Retail (99.00)
- Product Attributes: Anti-Reflective (Deluxe), Total Cost (11.00), Total Retail (99.00)



## 10 Reports: Raw Data Extracts

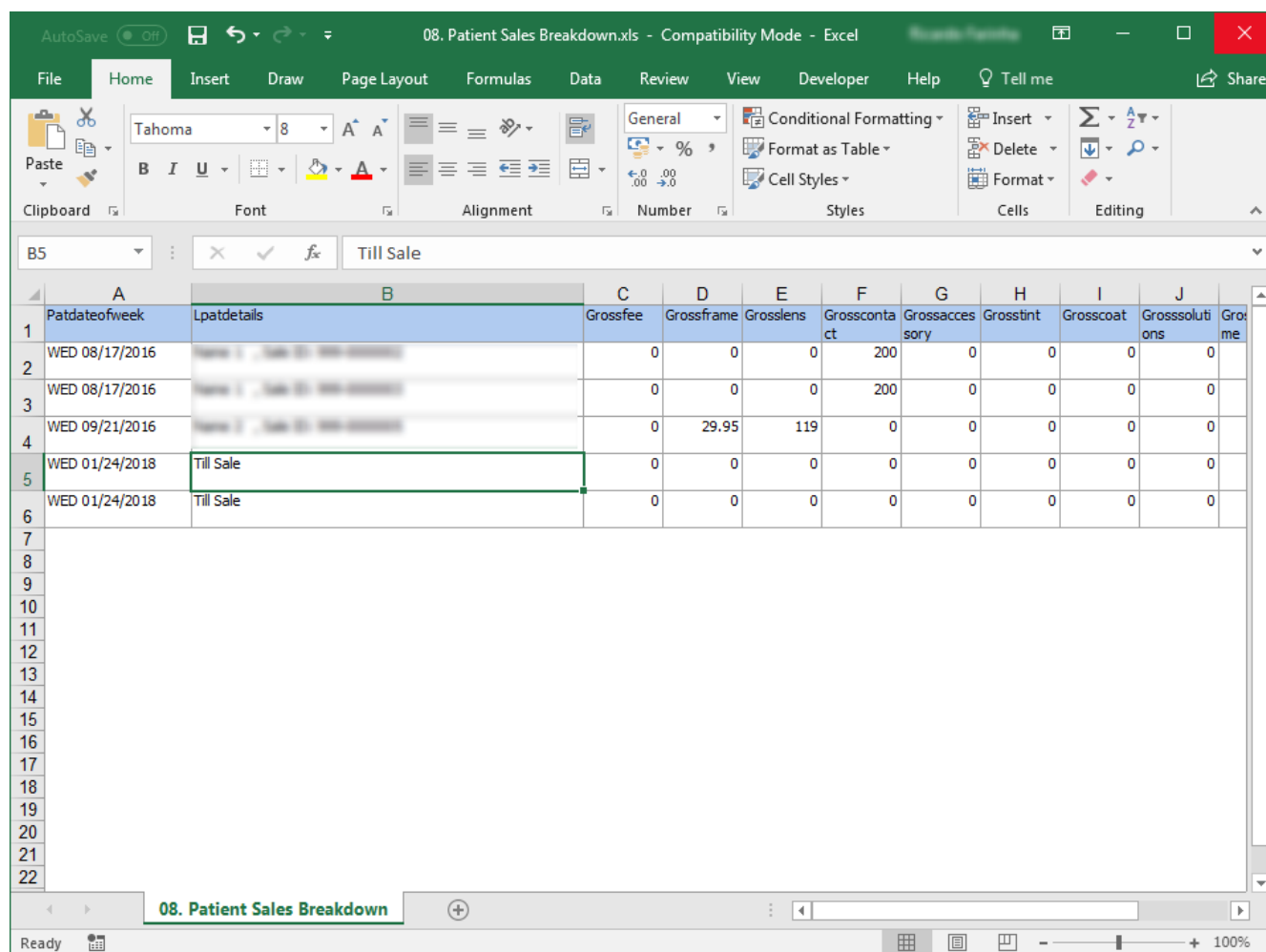
A new feature has been added to some reports in Acuitas, which allows the user to access and use report raw data for multiple purposes such as accounting, stock management, and to feed data into external systems.

The reports that support this feature are:

1. Sales Breakdown
2. Cash Book
3. Sales Reconciliation
4. Items by Type and Lens Type Sales
5. Items
6. Promotion/Discount Report
7. Stock Adjustments Report
8. Patient Sales Breakdown
9. Stock cost and Stock Listing
10. Exchanges, Refunds and Remakes
11. Outstanding Balance Report
12. Suppliers Balances
13. Creditors Balances
14. Debtors Balances
15. Bad Debts
16. Hospital Balances
17. Institution Balances
18. Staff Balances
19. Unpaid Sales
20. Deposit Sales
21. VAT Breakdown Audit Report
22. Remittance Advice Breakdown Report
23. Insurance Payments Reports



The raw data report is then presented in Excel.



Patdateofweek	Lpatdetails	Grossfee	Grossframe	Grosslens	Grosscontact	Grossaccessory	Grosstint	Grosscoat	Grosssolutions	Grossme
WED 08/17/2016		0	0	0	200	0	0	0	0	0
WED 08/17/2016		0	0	0	200	0	0	0	0	0
WED 09/21/2016		0	29.95	119	0	0	0	0	0	0
WED 01/24/2018	Till Sale	0	0	0	0	0	0	0	0	0
WED 01/24/2018	Till Sale	0	0	0	0	0	0	0	0	0

## 11 Other Highlights

### *ESC key allowed to be used to close the PIN entry screen*

This feature allows the user to press the ESC (Escape) key to cancel out of the PIN entry popup screen.

### *Cancel Appointment via Web Scheduler*

A new cancellation appointment status was added to the Web Scheduler tab in the Configuration screen to be used as a default cancellation status for the Web Scheduler application.

### *Highlight negative payment claims in red in remittance advice posting*

The remittance advice posting screen now displays the group header amount paid in red if there is a negative chargeback value in one or more claim lines.

### *'Unknown' gender option*

A new configuration option has been added to allow a patient gender not to be identified by either male or female. Instead, a third gender option "Unknown" is added. Furthermore, users can look for patients with Unknown gender in the Query module.

Also, users can also create and submit 837 electronic claims using the Unknown gender.

### *Shape maintenance in the Incomplete Dispense screen*

This feature allows the users to select or modify a shape for a frame or sunglasses in the Incomplete Dispense screen.

### *Refresh button added to the Untendered Sales screen*

A Refresh button has been added to the Untendered Sales screen so that users can refresh the data without having to reopen the screen.

### *Icons added to the Patient Summary events.*

The Patient Summary display screen has been modified to include icons to denote the different types of events occurring on a patient's record.

### *Aged credits display added to accounts module outstanding balances view*

(Enterprise only) The accounts module contains a view for showing the aged balances breakdowns of any patients with a current balance. In large enterprises where the data to support these views is pre-populated overnight, this view has been expanded to now also include a breakdown of the age of any credits existing on the account.

### *Ability to sell solutions separately only*

A new configuration option ('Validated Contacts' / 'Sell Solution Separately Only') has been added to the system to disable the ability to dispense solutions with a contact lens so that users must dispense it in the New Dispense screen using the 'Other' button.

### *New option to enforce numeric values only on phone number fields*

A configuration option was previously introduced to validate whether the phone number entered is 10 digits long. However, that validation only checks the numeric characters and ignores all non-numeric characters. Therefore, a new configuration option has now been added to enhance this validation, so that it can be configured not to allow any non-numeric characters in the phone number.

### *Arrived option added to the list of available types*

In the appointment status maintenance screen, the statuses grid contains a column called "Type," because the text/wording of the statuses is user-configurable, the type is used by the application in various locations to know what specific status is being used to carry out specific functionality or validation. "Arrived" has now been added to that list of available types.

### *Incremental search added to patient name in show locks screen*

A search facility has been added to the record locks display screen which allows the user to type into the patient name grid column and the application auto-searches to find the first record in the grid with a name matching those characters. This allows for a quick way to find a specific patient.

### *Primary Care Trusts removed from configuration menu for any Non-UK countries*

The menu item Primary Care Trusts (PCTs) under the Configuration menu has been turned off for non-UK customers.

### *Payment notes added to sales screen to allow viewing of converted payment notes from v 1.2*

This feature allows converted Payment Notes from version 1.2 to be viewed through the Account Summary Screen in Acuitas 2.0. This is accessed by clicking the patient's Account Balance on the Patient Summary screen.

### *Display Warning when users set Recall method to None*

A confirmation message was added to alert the user when they are changing Recall method to 'None' on the Patient Summary screen. The confirmation message is configurable.

### *A Practice Name column has been added to the SMS module*

For enterprises sharing all data between all stores, the SMS management screen shows all the SMS messages for these stores. A new "Practice Name" column was added to display which practice each of the SMS messages is related to; this information is only shown when the user selects "ALL" from the practice drop down.

### *Add System Setting for removing the I radio button from Combined Exams checklists*

A new configuration option has been added to allow the Combined Exams screen checklists to only contain P (Problem) and N (Normal) and for the third option, I (Information), to be removed.

### *Contact Lens Catalog Upload screen improvements*

On the Contact Lens Catalog Upload screen, users can upload contact lens catalog files to the system. The system interprets the file content and displays whether each item is uploaded successfully or not on the screen. Now in addition to this existing functionality, users are now able to filter the result grid and/or save the result grid contents to a CSV file.

---

*Implement new controlled message when an Oracle error occurs in imaging*

If there were errors on saving an image due to database storage space, often the thumbnail was being saved while the full image was not, which subsequently led to an unexpected error message being displayed if the user clicked on the thumbnail to see the full image.

This feature changed the error message to a controlled message which states "Image has failed to save. Please contact Ocuco support."

## 12 Equipment Links

### *Reichert 7 Tonometer*

A link to Reichert 7 / 7CR tonometer was added to Eye Pressure screen.

### *Medop LM-900 Lensmeter*

Link to Medop LM-900 lensmeter was added to the Refraction screen.

### *Integration with M'eye fit measurement device (ACU-8839)*

A link to Essilor M'eye Fit visual dispensing and centration measurement device was added to the spectacle dispense screen.