OneSight
IT Operations

Closed Loop

Coordinators

User Guide

Overview

This document details the steps required to access the Closed Loop report on clinic. This should be done by the IT Captain or Clinic Manager at the end of each day.

Access

To access the Closed Loop Report page please navigate to www.onesightclinics.org. At the top of the page click on the option for "Coordinators" as seen below.

On the admin page you will select the option for "Closed Loop" as seen below.

You will now see the system access login page. Enter your login credentials and click on "Login."

Closed Loop Report

You will now be brought to the "Closed Loop/DPL" search page. Here you will see a few different fields/dropdowns.
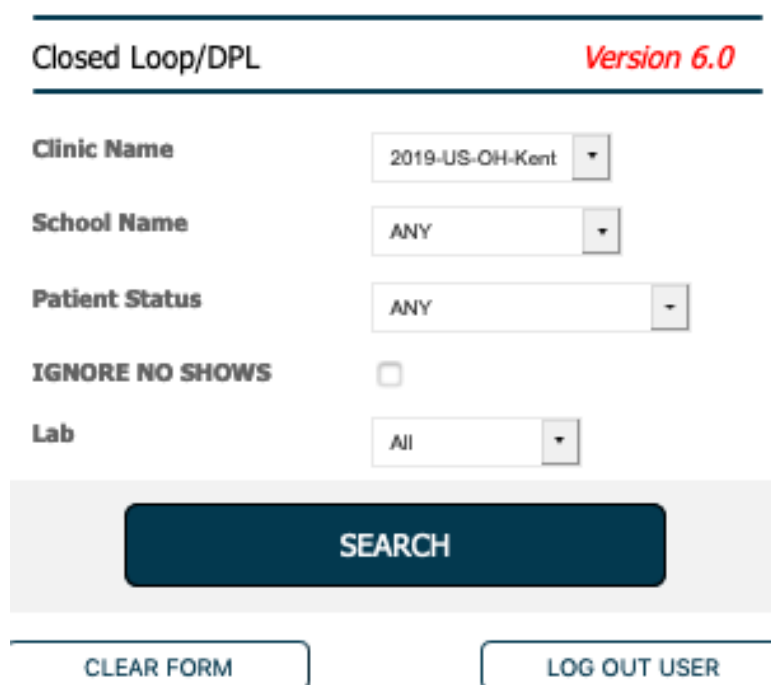
Clinic Name – The clinic you are assigned to. This cannot be changed.

School Name – Dropdown of all school, groups, and communities that are part of this clinic.

Patient Status – Dropdown of every status a patient could be assigned to.

Ignore No Shows – Select this box if you would like to have "No Shows" not appear in your search.

Lab – Dropdown of all labs that could be processing orders.

Once you have selected your search criteria, click on the blue button at the bottom labelled "Search."

You will now be brought to Closed Loop reporting page. This will display all patient results from your search criteria.

Select Multiple Patients
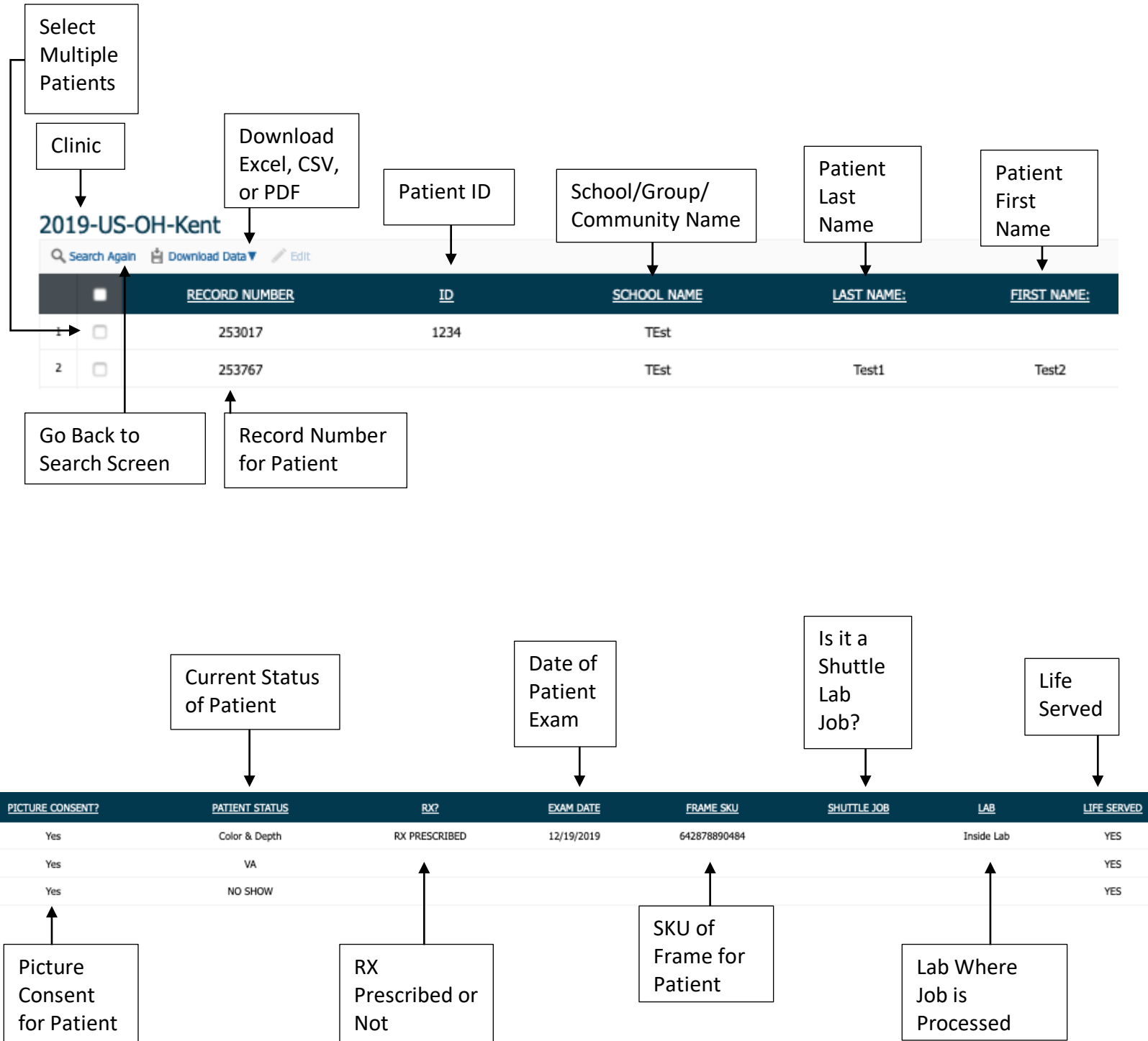
Clinic

Download Excel, CSV, or PDF

Patient ID

School/Group/ Community Name

Patient Last Name

Patient First Name

2019-US-OH-Kent

Q Search Again 📋 Download Data ▼ ✏ Edit

■	RECORD NUMBER	ID	SCHOOL NAME	LAST NAME:	FIRST NAME:
1 ☐	253017	1234	TEst		
2 ☐	253767		TEst	Test1	Test2

Go Back to Search Screen

Record Number for Patient

Current Status of Patient

Date of Patient Exam

Is it a Shuttle Lab Job?

Life Served

PICTURE CONSENT?	PATIENT STATUS	RX?	EXAM DATE	FRAME SKU	SHUTTLE JOB	LAB	LIFE SERVED
Yes	Color & Depth	RX PRESCRIBED	12/19/2019	642878890484		Inside Lab	YES
Yes	VA						YES
Yes	NO SHOW						YES

Picture Consent for Patient

RX Prescribed or Not

SKU of Frame for Patient

Lab Where Job is Processed

The top left of the page will show the clinic name and right below that there is an option to "Search Again" which will take you back to the search screen. To the right of this there is an option for "Download Data." You can select that to export this report as either a CSV, Excel, or PDF file. To the right of that there is a button for "Edit" that is grayed out. You can select the empty box to the left of any patient and that will unlock the edit button allowing you to edit any patient or multiple patients at once. This report also has the following rows.

Record Number – The record number for that specific patient. This cannot be changed.

ID – The patient ID. This is the number used with pre-printed labels or a unique identifier for the patient.

School Name – The name of the School, Group, or Community the patient is a part of.

Last Name – The patient's last name.

First Name – The patient's first name.

Picture Consent – Yes or No if the patient has given consent to have his/her picture taken.

Patient Status – The status that the patient is currently in.

RX? – Has the patient been prescribed an RX or not.

Frame SKU – The SKU of the frame the patient is getting.

Shuttle Job – Is the job a Shuttle Lab job or not.

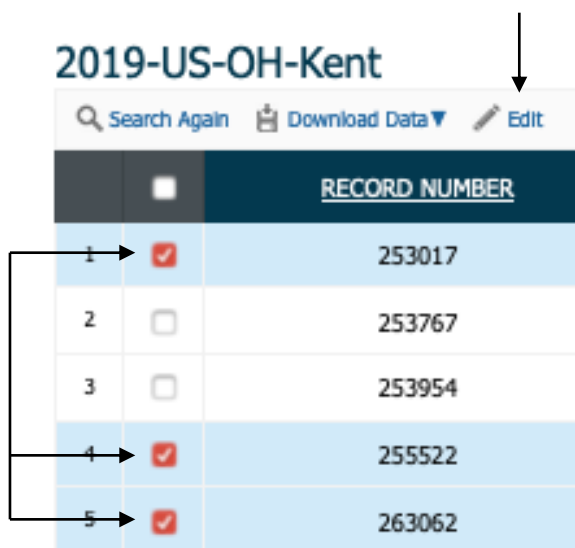**Lab** – Which lab the patient's job is being processed at.

Life Served – Yes or no if the patient is considered a life served. NOTE: This will only show as "No" if the patient was a "No Show."

It is important to go through this report at the end of every day to confirm each patient is in the correct status and all patients who show as a "Life Served" were actually seen. This is how we pull reporting and want to make sure everything is as accurate as possible.
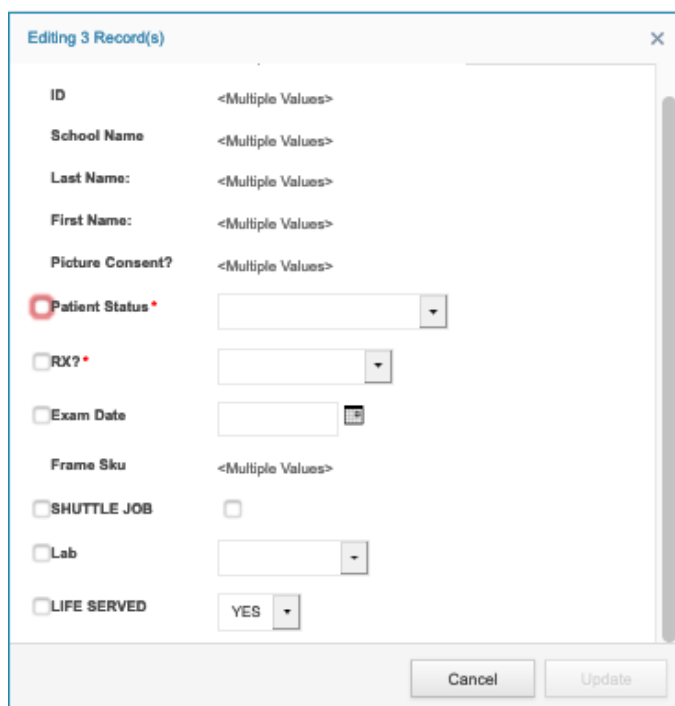
Edit

If the Closed Loop report has any inaccuracies you can change them directly in the report.

First you will need to click the empty box found to the left of the patient you wish to edit. If there are multiple patients you wish to edit you can select as many of the empty boxes as you need. Once you have done this you will click on the button at the top left labelled "Edit."

Now a box will appear in the middle of the screen allowing you to edit the patient(s). There are only a few options that you can change from here.

Patient Status – Change if the patient shows in the incorrect status.

RX? – Change to No RX, No Show, or RX Prescribed.

Exam Date – Change if the exam date is missing or incorrect.

Shuttle Job – Select the box if it is a shuttle lab job.

Lab – Select the lab that the job is being processed at.

Life Served – Select Yes or No. No should only be chosen if the patient was a No Show. Even if the patient was only at Visual Acuity they are still considered a life served.

Once you have finished your edits you can click on "Update" at the bottom right and this will save your records.