

What's Next for Optivate

Built for Ophthalmology & Eye Care Practices

1 · Converse

2 · Self-Scheduling Link

3 · PE/BI Dashboards

4 · ASC Integration

We're continuing to invest in tools that make your practice run smoother for your patients and your team. Here's what's coming.

At a Glance

FEATURE	WHO IT HELPS MOST	WHAT YOU GET
Converse	Patients & Staff	Real conversations, not just tasks: faster communication and less reliance on phone calls
Self-Scheduling Link	Patients & Front Desk	Less scheduling friction, fewer no-shows, and lower call volume
PE/BI Dashboards	Practice Leadership	Data-driven insight into engagement and staff productivity, our #1 requested feature
ASC Integration	Surgical Practices	Eliminates duplicate work and errors between clinic and surgery center

1

Converse

Secure, Real-Time Messaging for Patients and Staff

No more phone tag. Converse gives your practice a secure channel for real-time conversations, both with patients and between your own team.

WHAT THIS MEANS FOR YOUR PRACTICE

Faster answers for patients.

Post-op questions, medication clarifications, and follow-up scheduling can be handled in real time, with no voicemail and no waiting on hold. That matters most when patients are navigating time-sensitive recovery after procedures like cataract surgery or intravitreal injections.

Real conversations, not just task lists.

Your team already has tools for tracking tasks. Converse adds what's missing: the back-and-forth your staff actually needs, whether it's front desk syncing with techs on a packed schedule or a physician getting a quick second opinion on a diagnostic image without stepping away from their workflow.

Fewer calls, more face time.

Less call volume means your front desk and care team can spend more time with the patients in front of them.

Continuity of care that's actually documented.

Care coordinators and surgical counselors can keep an ongoing, trackable conversation with patients moving through multi-visit treatment plans, from glaucoma management to AMD injection series.

2

Self-Scheduling Link

Let Patients Book Their Own Appointments

You set the parameters (physician, appointment type, date range), and your patient gets a simple text or email link to pick a time that works for them.

WHAT THIS MEANS FOR YOUR PRACTICE

No more scheduling phone tag.

Skip the back-and-forth calls trying to land on a time that works. This is especially valuable for high-volume practices juggling multiple providers and appointment types, from routine exams to surgical consults to post-op checks.

A better experience for your patients.

Working patients and parents booking for their kids can schedule after hours, on their own time, without waiting on hold.

Less administrative load on your team.

Every appointment booked this way is one less phone call your staff has to make, freeing up time for in-office service and check-in.

Fewer no-shows.

Patients who choose their own appointment time are more likely to remember it and show up, compared to a time slot they were simply assigned.

Room to grow.

Makes it easier to bring new patients onto the schedule without adding to your intake call volume.

3

Practice & Business Intelligence Dashboards

See What's Really Happening in Your Practice

Our most requested feature is now on the roadmap: reporting dashboards that give you real visibility into practice performance, patient engagement, and staff productivity.

WHAT THIS MEANS FOR YOUR PRACTICE

A long-time ask, finally delivered.

This has been the #1 requested feature for 16 years. We've heard you, and it's coming.

Clear visibility into patient engagement.

See how patients are interacting with your practice (communication response rates, appointment adherence, portal usage) and spot gaps in the patient journey before they become problems.

Staff productivity insight, front and center.

Get data-driven visibility into technician throughput, provider scheduling efficiency, and front-desk performance, which is especially valuable for multi-location groups managing techs, scribes, and optometrists across sites.

Decisions backed by data, not guesswork.

Spot bottlenecks such as testing lane backups or slow check-in, and make staffing and workflow changes based on real numbers.

Reporting you no longer have to build yourself.

Insight that other EMR/PM platforms leave you to assemble by hand comes standard, so your team spends time acting on the numbers instead of compiling them.

4

ASC Integration

Seamless Connection Between Your Clinic and Surgery Center

Preoperative paperwork and imaging flow directly from your clinic EMR into your ASC software, with no manual transfer required.

WHAT THIS MEANS FOR YOUR PRACTICE

No more duplicate data entry.

Preoperative forms, patient history, and diagnostic imaging (biometry, OCT, topography) move automatically from your clinic EMR into the ASC system.

Time back for your clinical staff.

Surgical schedulers and pre-op nurses no longer have to manually compile and transport patient charts and imaging ahead of procedures like cataract, glaucoma, or corneal surgery.

Lower risk of errors.

Manual transcription and file transfer between systems can lead to missing or mismatched data, such as incorrect IOL calculations or missing consent forms. Direct integration reduces that risk significantly.

A smoother day of surgery.

Your surgical team has immediate access to complete, accurate patient records and imaging at the ASC, with no delays waiting on paperwork from the clinic.

Built for surgical practices.

Designed specifically for practices with an on-site or affiliated ASC, addressing one of the most significant pain points in surgical ophthalmology.

Optimize Care. Elevate What Matters.

This roadmap is shared for planning purposes only. Features, capabilities, and sequencing described here are subject to change, and no delivery dates are committed or implied. Nothing in this document constitutes a contractual obligation or a guarantee of future availability.