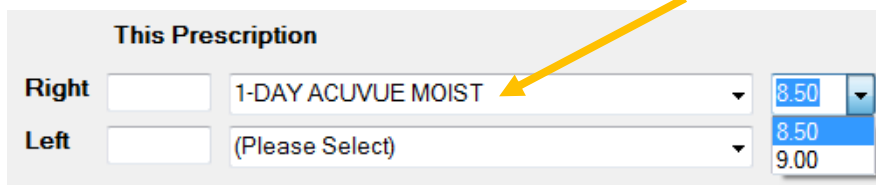


The principle behind contact lens prescriptions and sales in i-Clarity is that contact lenses are arranged in 'brands' and each brand is associated with one or more specific products. A brand is specified by the manufacturer itself.

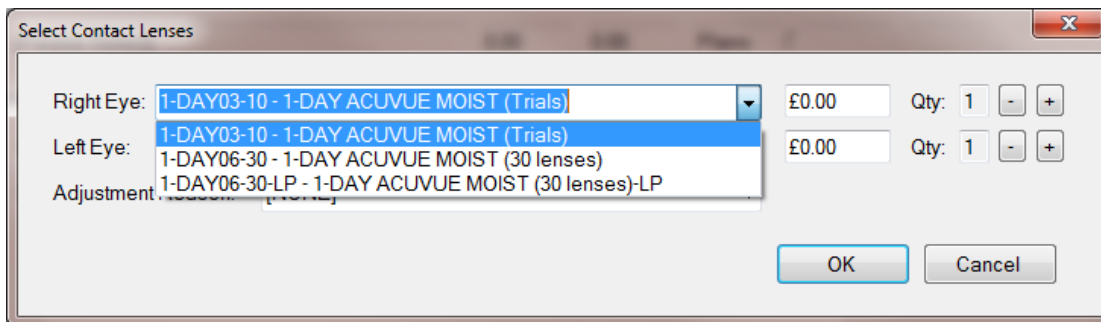
For example: Johnson & Johnson own a brand called '1-DAY ACUVUE MOIST'.

Within i-Clarity, when you create a new CL prescription, you select the brand from the brand drop-down and this will allow you to select the validated values for that brand:

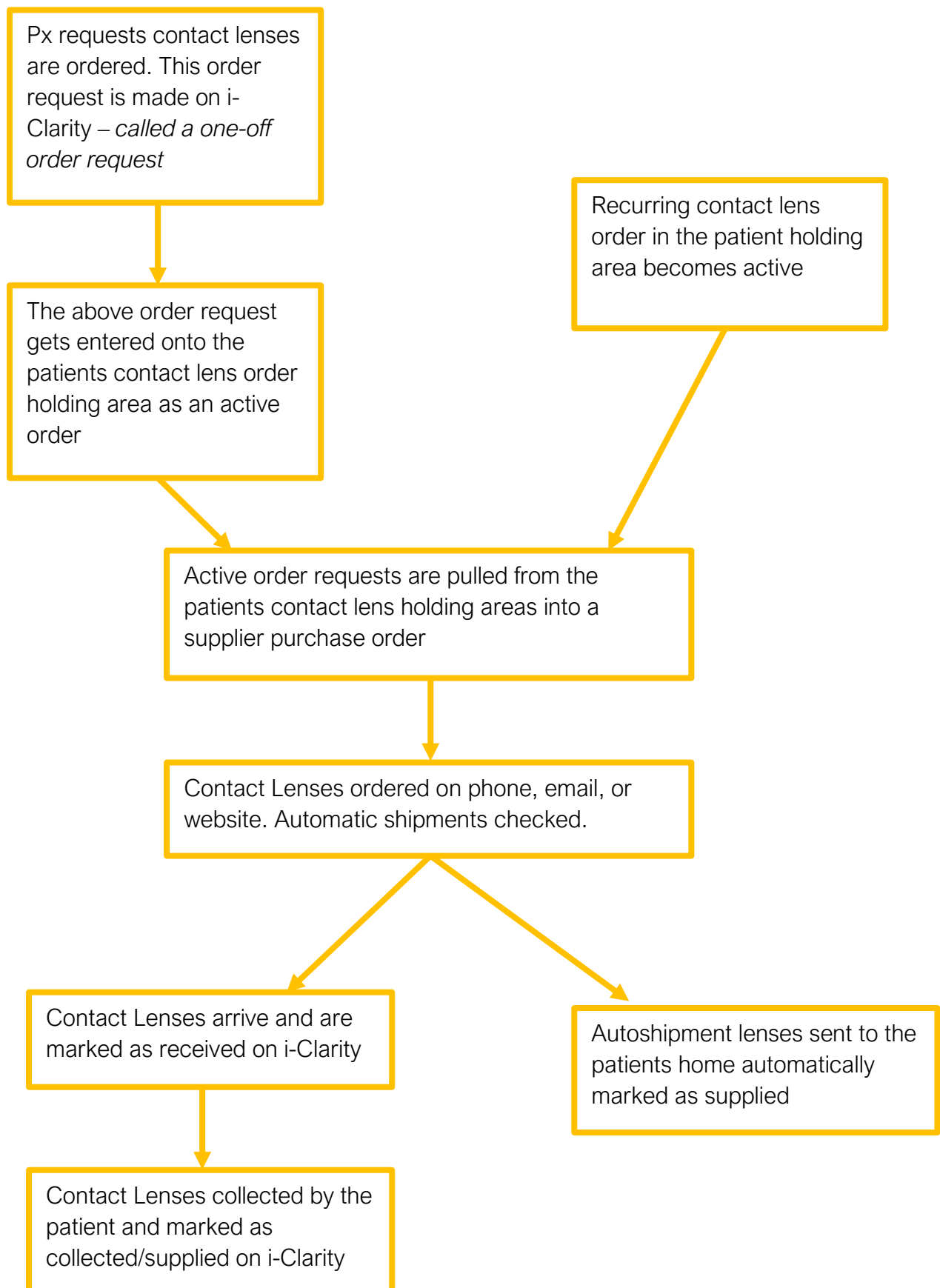


However, Johnson & Johnson supply lenses under that brand name in at least 3 different pack sizes: a 30 pack, a 90 pack and a 5 pack of trials.

So, in i-Clarity, a given Brand is linked to 1 or more product codes that correspond to each of the available pack sizes for that brand. Whenever you need to supply contact lenses then you are presented with all the different pack sizes that are available for the prescribed brand of lens.

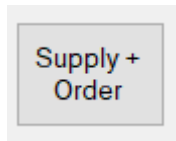


The contact lens order process in i-Clarity



Requesting a one-off supply of lenses

Click on the button 'Supply + Order' (This button is located in the CL Rx form, and also in the Contact Lens Clinical Record).



From the drop-down list of products, select the pack size of lenses you would like to order at the correct price point.

A screenshot of the "Supply + Order Contact Lenses" dialog box. The dialog has a title bar "Supply + Order Contact Lenses" and a close button. It contains fields for "Right Eye" and "Left Eye" with product names and prices. The "Right Eye" field is highlighted with a yellow box. There are also quantity fields and an "Adjustment Reason" dropdown. At the bottom are "OK" and "Cancel" buttons.

This Prescription - 03 Sep 2020

Right: 1-DAY ACUVUE MOIST for Astigmatism 8.50 14.50 -1.00 -0.75 20 £23.00 Qty: 1 - +

Left: 1-DAY ACUVUE MOIST for Astigmatism 8.50 14.50 -1.00 -0.75 20 £23.00 Qty: 1 - +

Right Parameters: Right Eye: 1-DAY ACUVUE MOIST for Astigmatism (30 lenses) £23.00 Qty: 1 - +

Left Parameters: Left Eye: 1-DAY ACUVUE MOIST for Astigmatism (30 lenses) £23.00 Qty: 1 - +

Clinical Notes: Adjustment Reason: [NONE] Collect from branch OK Cancel

If required amend the quantity of packs to be ordered.

A screenshot of the quantity adjustment controls. It shows two rows, each with a "Qty:" label and a set of three buttons: a minus button, a text input field containing "1", and a plus button.

Qty: 1 - +

Qty: 1 - +

Select any price adjustments you require.

A screenshot of the "Adjustment Reason" dropdown menu. The dropdown is open, showing the selected option "[NONE]".

Adjustment Reason: [NONE]

Click Ok

A screenshot of the "Supply + Order Contact Lenses" dialog box, similar to the one above, but with the "OK" button highlighted by a yellow box.

Supply + Order Contact Lenses

Right Eye: 1-DAY ACUVUE MOIST for Astigmatism (30 lenses) £23.00 Qty: 1 - +

Left Eye: 1-DAY ACUVUE MOIST for Astigmatism (30 lenses) £23.00 Qty: 1 - +

Adjustment Reason: [NONE] Collect from branch OK Cancel

This will enter a sale for the lenses onto the patient account and will log the contact lens order request on the patients CL holding area on the CL Mgt form.

A screenshot of a "Direct Debit / Contact Lens Summary" window for Mrs Patricia Maylin. It contains a table with columns for Item Type, Eye, Qty, Description, Order Date, Supply Date, Expiry Date, Rx Date, To Be Ordered, Auto Sale, DD, Price, Int, Int, One Off, Type, and Auto Ship. The table has two rows of data.

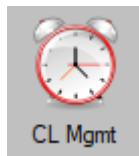
Direct Debit / Contact Lens Summary - Mrs Patricia Maylin

Item Type	Eye	Qty	Description	Order Date	Supply Date	Expiry Date	Rx Date	To Be Ordered	Auto Sale	DD	Price	Int	Int	One Off	Type	Auto Ship
C	L	1	1-DAY07-30 - 1-DAY ACUV...	03/Sep/2020	01/Jan/2100	01/Jan/2100	03/Sep/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£23.00	1	M	<input checked="" type="checkbox"/>	B	<input type="checkbox"/>
C	R	1	1-DAY07-30 - 1-DAY ACUV...	03/Sep/2020	01/Jan/2100	01/Jan/2100	03/Sep/2020	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	£23.00	1	M	<input checked="" type="checkbox"/>	B	<input type="checkbox"/>


Setting up a recurring contact lens order request

This feature is used for when a patient would like their contact lenses to arrive without having to contact the practice to request the order. It can be used in conjunction with any automatic shipments you have set up on your supplier websites.

Open the contact lens management module on the active patient record



Underneath the patients contact lens order holding area click the 'Add New Contact Lens' button

 Direct Debit / Contact Lens Summary - Mrs Patricia Maylin

Item Type	Eye	Qty	Description	Order Date	Supply Date	Expiry Date	Rx Date

Add New Contact Lens Add New Aftercare Fee Add New Solution Add New Misc. Modify Selected Item Show History Monthly

This will open a new box called 'Products/Services to be supplied'

Contact Lens Information

Prescription: (Select)

Eye: [PLEASE SELECT]

Aftercare Information

No of Checkups Per Year:

No of Eye Exams Per Year:

Update Aftercare

Save Exit - Don't Save Changes

All Products/Services

Product:

Description: VAT: Fully VATable Quantity: Price per eye:

To be supplied every: (Select) Supply Type: Collect from branch

☐ To be Ordered ☐ Sold Automatically ☐ Paid for by DD or SO ☐ Automated Shipment

Next Supply Date: 03 September 2020 Expiry Date: 03 September 2021 Date Cancelled: 03 September 2020

Notes:

From the prescription drop-down, select the patients contact lens specification you would like to put on a recurring order.

Products / Services To Be Supplied

Contact Lens Information

Prescription: for Astigmatism, L: 1-DAY ACUVUE MOIST for Astigmatism ▼

Eye: Both ▼

If the brand of contact lens is the same in both the right and left lens, then the 'Eye' field will change to both and you only need to complete this process once. If the brand of lens is different in the right and left eye, select an eye from the drop down. Once you have completed the following process for the one eye you will need to complete it again for the second eye.

Next select the product pack size you would like supplied from the Product drop down. If you have different prices for the pack sizes, select the applicable price point for this patient.

All Products/Services

Product: 1-DAY07-30-LP - 1-DAY ACUVUE MOIST for Astigmatism (30 lenses)-LP (£18.00) ▼

Selecting the product you require will automatically fill the product description box below.

All Products/Services

Product: 1-DAY07-30-LP - 1-DAY ACUVUE MOIST for Astigmatism (30 lenses)-LP (£18.00) ▼

Description	VAT	Quantity	Price per eye
1-DAY07-30-LP - 1-DAY ACUVUE MOIST for Astigmatism	Fully VATable ▼	1	£18.00

Check the quantity of packs being supplied for one eye and amend if required.

You can overwrite the product price to a bespoke price if required.

Complete the supplied every field with the frequency the patient will be receiving the lenses.

To be supplied every:

Change the supply type to the patients or practices preferred option

Supply Type:

Next you need to specify the order method of these contact lens products. If the practice needs to order the contact lenses when they are due tick the box 'To be ordered'. If the lenses are being put on automatic shipment with the supplier then tick the 'automatic shipment' box.

☐ To be Ordered ☐ Sold Automatically ☐ Paid for by DD or SO ☐ Automated Shipment

Then specify how the product is being supplied. If the patient is coming into collect the lenses, then the sold automatically box should be unticked. If the lenses are going directly to the patient from the supplier then tick the 'sold automatically' box.

☐ To be Ordered ☐ Sold Automatically ☐ Paid for by DD or SO ☐ Automated Shipment

Then specify how the patient is paying for the products. If the patient is paying by direct debit, then tick the 'Paid for by DD or SO' box.

☐ To be Ordered ☐ Sold Automatically ☐ Paid for by DD or SO ☐ Automated Shipment

Next complete the 'Next Order Date'. This is the date you would like i-Clarity to generate an order for the lenses or and automatic shipment checklist.

Next Order Date Next Supply Date


Complete the 'Next Supply Date'. This is the date the patient would ideal be collecting or receiving their next supply of lenses.

Next Order Date	Next Supply Date	E
28 November 2020 ▾	03 December 2020 ▾	0

Click Save

Save

The contact lenses will now be listed in the product to be supplied box e.g. the patient contact lens holding area at the top of the contact lens management page.

 Direct Debit / Contact Lens Summary - Mrs Patricia Maylin

Item Type	Eye	Qty	Description	Order Date	Supply Date	Expiry Date	Rx Date	T
C	R	1	1-DAY07-30-LP - 1-DAY AC...	28/Nov/2020	03/Dec/2020	03/Sep/2021	03/Sep/2020	C
C	L	1	1-DAY07-30-LP - 1-DAY AC...	28/Nov/2020	03/Dec/2020	03/Sep/2021	03/Sep/2020	

Generating a list of contact lenses due to be ordered.

We recommend this process is completed daily, but you can select a different time interval for your practice is desired.

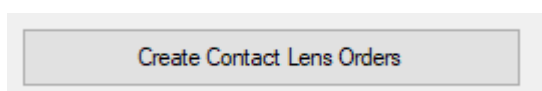
Running this process will pull all active contact lens order requests from the patients holding area into one supplier order.

An active order is either a one-off order request or a recurring order line with a order date of today or older with an expiry date of tomorrow or more.

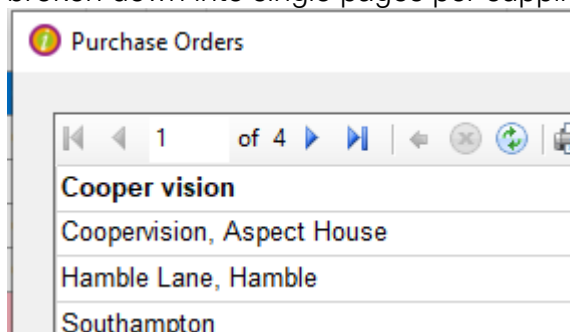
Open the contact lens management module for any patient.



At the bottom of the form click on the button 'Create Contact Lens Orders'

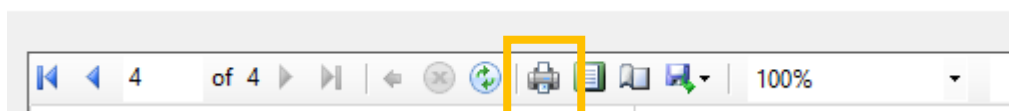


Clicking this button will pull all contact lens order request into one purchase order form broken down into single pages per supplier.



Auto shipment lenses will be separated from lenses that you need to manually order. If a list of lenses is due for auto shipment it will be noted at the top of the form.

If you prefer to print these purchase orders so you have a paper version when completing your online contact lens orders, click on the printer icon at the top of the form.



When completing your online ordering of the lenses listed on the purchase order, we recommend that you include the i-Clarity auto generated purchase order number. This will assist you when you are checking in the lenses you receive from the supplier.

Purchase Orders

1 of 4

Cooper vision

Coopervision, Aspect House

Hamble Lane, Hamble

Southampton

SO31 4NH

Tel: 0870 9000 055

Fax: 0870 9000 056

Order Number: TE /C94

Once the form has been printed or you have finished your online ordering whilst viewing the form then click the 'Close' button.

After clicking close the following message will appear 'Have these contact lenses and solutions been ordered?'

Orders

?

Have these contact lenses and solutions been ordered?

Yes No

- If you were VIEWING the form and have ordered the lenses listed, click 'Yes'
- If you were VIEWING the form and have not ordered the lenses listed, click 'No'
- If you PRINTED the form and have finished ordering the lenses listed, click 'Yes'
- If you PRINTED the form and have not ordered the lenses as you plan to order them from the printout a little later, click 'YES'

This last scenario is important as if you click No, lenses listed on the order will be returned to the patient records. When you reopen the purchase order it will pull all lenses that requiring ordering into the form again, and this may include new order requests that will not be on your original print out, you then run the risk of these lenses not getting ordered. It may also have a new purchase order number.

Clicking 'Yes' will add an automatic note on to the patient activity and patient CL order notes

CL Patient Notes for Mr Peter Brown

Date	Note
03/Sep/2020 11:47:11	CLs ordered, Order Ref: TE/C96 (Collect from branch) – CG

Marking contact lenses are Received.

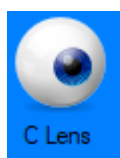
This process should be completed when checking in lenses that have arrived from the supplier.

This process can be done in one of two ways.

1. This can be done on a patient bases from the patients CL Rx form
2. It can be done on a purchase order bases form the CL Mgt form of any patient record.

Receiving lenses for an individual patient.

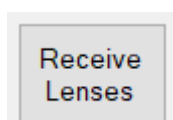
Open the CL Rx form for the active patient. (The patient whose contact lenses have arrived)




You can check the contact lenses that have arrived match the contact lens specification for the patient.

Right	<input type="text"/>	ACUVUE ADVANCE for ASTIGMATISM	8.60	14.50	-3.50	/	-0.75	10
Left	<input type="text"/>	ACUVUE ADVANCE for ASTIGMATISM	8.60	14.50	-3.50	/	-0.75	10

Click on the 'Receive Lenses' button



Check the correct purchase order is listed in the 'Select Purchase Order' field. *You can click on the drop-down arrow if you need to select a different purchase order.*

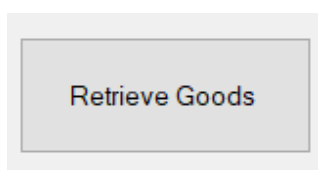
 Receive Goods

Select Purchase Order:

Dispatch Note Ref:

Set

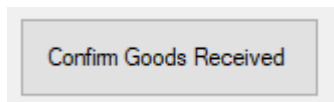
Click the button 'Retrieve Goods'



The contact lenses products and quantity that was ordered will be displayed

Product	Description	Qty	DN Ref	Label	Px ID	Patient	Rx
1-DAY03-10-LP	1-DAY ACUVUE MOIST (10 lenses)-LP	1		<input checked="" type="checkbox"/>	2	Peter Brown	R: -0.50/-0.75 x 80
1-DAY03-10-LP	1-DAY ACUVUE MOIST (10 lenses)-LP	1		<input checked="" type="checkbox"/>	2	Peter Brown	L: -1.00

If the correct pack size and the quantity of packs arrived is correct click the button 'Confirm Goods Received'



Clicking the button 'confirm goods received' will add an automatic note to the patient activity and CL notes to say the lenses have arrived.

Date	Note
03/Sep/2020 12:07:02	CLs received, Order Ref: TE/C95 (Collect from branch)

An automatic action point will also be created to say the lenses have been arrived and the patient needs to be advised.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
03/Sep/2020	03/Sep/2020	Contact patient - contact lenses received. (Collect from branch)	<input checked="" type="checkbox"/>	N/A		N/A

Receiving lenses that have arrived together on one purchase order.

Open the Contact Lens Management module on any patient record.



Click the button 'Receive Goods' at the bottom right of the page.



The 'Receive Goods' form will open

Using the order number on the delivery note that was generated from i-Clarity and you entered online when ordering the lenses, select the correct purchase order from the drop-down list.

Click the 'Retrieve Goods' button

You can check the correct prescription has arrived from the purchase order

Product	Description	Qty	DN Ref	Label	Px ID	Patient	Rx
1-DAY01-30	1-DAY ACUVUE (30 lenses)	1		<input checked="" type="checkbox"/>	3	Barry James	R: -10.00
1-DAY01-30	1-DAY ACUVUE (30 lenses)	1		<input checked="" type="checkbox"/>	22	Joe Bloggs	R: -5.00
1-DAY01-30	1-DAY ACUVUE (30 lenses)	1		<input checked="" type="checkbox"/>	22	Joe Bloggs	L: -7.00/-1.25 x 90
1-DAY01-30-LP	1-DAY ACUVUE (30 lenses)-LP	1		<input checked="" type="checkbox"/>	20	Joe Brown	R: -6.00
1-DAY02-30	1-DAY ACUVUE for ASTIGMATISM (30 lenses)	1		<input checked="" type="checkbox"/>	3	Barry James	L: -6.50/-1.25 x 160
1-DAY02-30-LP	1-DAY ACUVUE for ASTIGMATISM (30 lenses)-LP	1		<input checked="" type="checkbox"/>	20	Joe Brown	L: -4.00/-1.25 x 160
1-DAY02-30-LP	1-DAY ACUVUE for ASTIGMATISM (30 lenses)-LP	3		<input checked="" type="checkbox"/>	10	Roberto Brownsort	R: -4.25/-0.75 x 160
1-DAY02-30-LP	1-DAY ACUVUE for ASTIGMATISM (30 lenses)-LP	3		<input checked="" type="checkbox"/>	10	Roberto Brownsort	L: -4.25/-0.75 x 160

Check the quantity that has arrived is correct

Click 'Confirm Goods Received'

Clicking the button 'confirm goods received' will add an automatic note to all the activity and CL notes to say the lenses have arrived of all the patient records in the list.

Date	Note
03/Sep/2020 12:07:02	CLs received, Order Ref: TE/C95 (Collect from branch)

An automatic action point will also be created to say the lenses have been arrived and the patient needs to be advised.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
03/Sep/2020	03/Sep/2020	Contact patient - contact lenses received (Collect from branch)	<input checked="" type="checkbox"/>	N/A		N/A

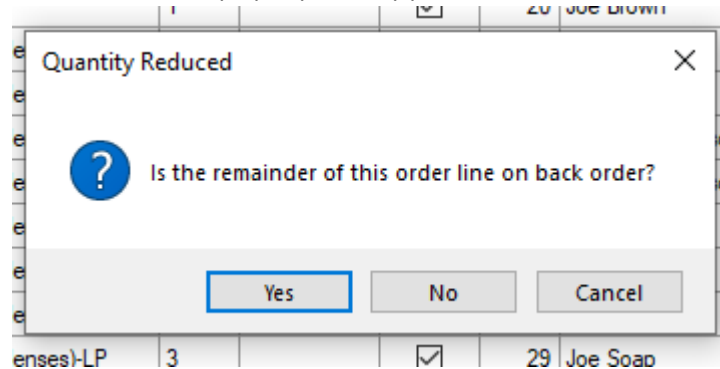
You can now put the lenses away and use the action list to notify the patients that their contact lenses have arrived.

Contact lenses on back order

If a contact lens has not arrived and is on back order, change the quantity to that lens to 0.

Product	Description	Qty	
1-DAY01-30	1-DAY ACUVUE (30 lenses)	0	

A confirmation pop-up will appear



Click yes to mark the lenses as on back order.

Patient collecting contact lenses.

Open the record for the patient collecting their contact lenses

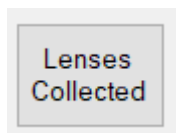
Open the CL Rx Form.



You can now check the prescription of the lenses you are giving to the patient match the contact lens specification on the record.

Right	<input type="text"/>	clariti XR toric	8.70	14.40
Left	<input type="text"/>	clariti XR toric	8.70	14.40

Click the 'Lenses Collected' button



The box that appears after clicking this button will differ in appearance depending on if the patient has a recurring order set up in the CL Mgt holding area.

If the patient does not have a recurring order and is collecting a one-off supply the following box will appear.

Lenses Collected

Please enter any collection notes below

OK

Cancel

Type any collection notes into the box e.g. 3months of lenses given to patient.

Click the Ok button.

A note will be entered onto the patient activity notes and CL notes to say the lenses have been collected.

CL Patient Notes for Mr Peter Brown	
Date	Note
03/Sep/2020 12:35:23	Lenses collected: R: clariti XR toric +4.75/-4.75 x130 L: clariti XR toric +4.75/-4.75 x130 Notes: .

If the patient does have a recurring supply of lenses set up, then the following box will appear.

Supply Products / Services

	Type	Eye	Qty	Description	Price	Supply Date	Expiry Date
▶	C	L	1	1-DAY03-10-LP - 1-DAY ACUVUE MO...	£0.00	09/Aug/2012	06/Dec/2017
	C	L	1	1-DAY03-10-LP - 1-DAY ACUVUE MO...	£0.00	09/Aug/2012	14/May/2014

	Type	Eye	Qty	Description	Price	Supply Date	Expiry Date
--	------	-----	-----	-------------	-------	-------------	-------------

Buttons: Confirm, Confirm - don't pay by DD/SO, Select All, Remove All, Supply one-off orders, Cancel

If the lenses are not already listed in the bottom box, double click on the contact lens to move it into the bottom box.

Click the confirm button.

This will mark the lenses as collected by adding a note to the patient activity and CL notes.

If this recurring supply is marked as to be paid for by DD then a note will be made in the product supplied by DD column of the CL Mgt module. If the lenses are not marked as paid for by DD then a sale will be created on the patient account that can now be paid.