

i-Clarity

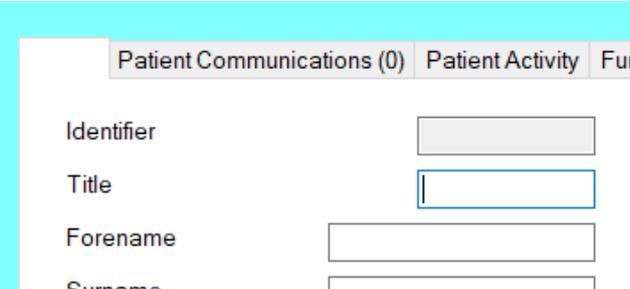
Creating a New Patient Record

i-Clarity Version 3.2.9

To create a new patient record firstly click the 'new' button



This will enter the cursor in the salutation field.



The ideal way to complete a new patient record is by using the tab button on the keyboard to move through the fields in order.

Enter the salutation first and then click tab, this will move the cursor to the first name field, enter the first name, then click tab to move the surname. Because this is an unsaved patient record i-Clarity auto capitalises the name fields as you tab out of them.

This auto capitalisation is disabled once the record has been saved.

The salutation field is predicted by i-Clarity by joining the title and surname, but you can over type this if necessary.

i-Clarity will change the gender drop down of the patient record to match the title you have entered, you will need to check this and you may need to amend it if a non-gender specific title has been entered such as Dr or Prof.

If you have a patient who would like to register as Non-Binary then enter Mx in the Title field or select non-binary from the gender drop down list

Click tab to enter the date of birth field

If you enter a date of birth of a patient who is under 16 then the background of the date of birth field will go red to signify this patient should ideally have an adult present with them in the practice.

Press tab on the keyboard to move through the telephone number fields entering the telephone number or numbers of the patient where relevant.

If you enter a mobile number for the patient it is important you check and possibly amend the communication preference for the patient's mobile phone.



Mob. Smartphone 07913670754
Contact by SMS? Yes

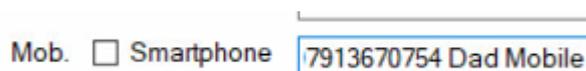
A yellow arrow points from the 'Contact by SMS?' dropdown menu to the 'Yes' option.

In the drop-down selection box below the mobile number you have the following options.

1. Contact by SMS? 'Yes' – this means the patient is happy to receive all types of communication by SMS this includes communications that are personal to them such as 'your specs are ready to collect' and non-individual SMS communications such as marketing.
2. Contact by SMS? 'Recall Only' - means the patient is happy to receive texts messages but only those that are personal to them such are 'you are due an appointment' or 'your contact lenses are ready for collection'. The system will not include the patient in any marketing communications sent by SMS from the system
3. Contact by SMS? 'Phone Only' – this means that the patient is only happy to receive phone calls on their mobile the system will not send the patient any text messages.

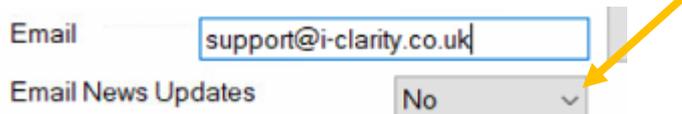
Next to the mobile number field there is a tick box labelled smart phone. If this box is ticked, then i-Clarity registers this patient as having a mobile number that can receive emails. When you send the confirmation reminders of booked appointment to patients, patients with a smart phone will be defaulted to receive an email rather than a text message.

It can be useful to be aware that you can write into any of the phone fields including the mobile field. For example, if this is a child's record you may wish to write the owner of the mobile phone number you have recorded for example mum/dad



Mob. Smartphone 7913670754 Dad Mobile

If you enter an email for the patient again it is important that you check and amend where required, the patient communication preference for email.



Email support@i-clarity.co.uk
Email News Updates No

A yellow arrow points from the 'Email News Updates' dropdown menu to the 'No' option.

1. Email news updates? 'Yes' - Means that the patient will not only receive individual emails specific to them such as appointment reminders, but they will also receive marketing emails
2. Email news updates? 'No' - Means the patient will not be included in marketing communications but will receive emails specific to them.

- The declined option will prevent any emails being sent to the patient from the system and can also be used to note that in the past the patient has declined to give their email address.

The next field is a drop down select for NHS reason.

NHS Reason

Voucher Eligible

Private patients should have the N/A selected.

i-Clarity will automatically change a NHS reason from N/A to over 60 once the patient turns 60 years of age. Also, if you enter a date of birth of a patient who is under 16 then the NHS reason will default to under 16. It is important to note that the selected NHS reason will never be unselected by i-Clarity. For example, when a patient turns 17 it will not change from Under 16 to N/A or fulltime Education. This is because there is more than one possible option that could be relevant.

We advise that the NHS reason for a patient is checked every time before booking an appointment for a patient because there are certain functions within i-Clarity that are affected by this field, such as bulk GOS form printing and fee selection.

The next field is an information field, is the patient entitled to a GOS 3 voucher – yes/no

NHS Reason

Voucher Eligible

When entering address for a patient we advise that you enter the postcode for the patient first and then click enter on your keyboard. This will look up the patient's address. The cursor will move to the address line 1 so that you can enter the house number.

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode

If the patient has a house name or you need to enter a flat number, you can click the down arrow to move all the address lines down 1 so you have space to enter this information.

Once you have looked up a patient address then the tick box next to the postcode is unticked, this deactivates the postcode lookup facility so that the patient's address cannot be accidentally overwritten. If in the future you need to change the patient's

address, tick the box next to the postcode first, then 

The next field to be completed is the patients GP, click on the drop-down arrow in this field to display the possible GPs you can choose from.

GP

This list of GPs available comes from within the maintenance section of i-Clarity. Depending on the set up of your i-Clarity you may or may not be able to edit the GPs from the front screen.

Clicking on the details button next to the selected GP will display the details of the surgery and their contact information.

The corporate field is to be used if that patients is part of a corporate scheme, has an employer that has arranged to pay for examination or spectacles or is entitled to a local scheme.

Corporate

Once you have completed all the necessary fields for that patient click save. Once the patient record is saved it will be given a patient identifier number.

Identifier
Title
Forename

You will be able to search for the patient record using this identifier number.

Now that the patient record has been saved you will be able to access the other record tabs.

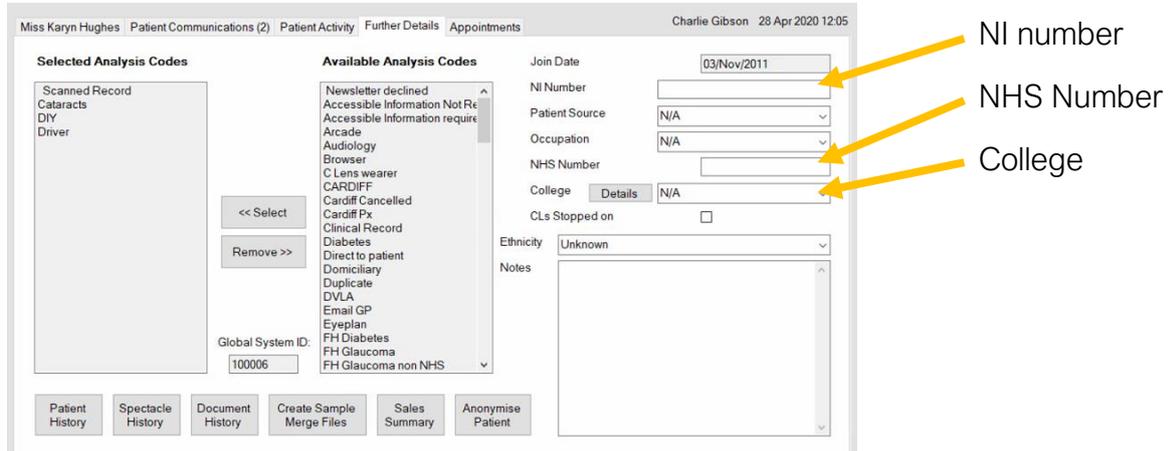
Miss Karyn Hughes

It is recommended that you click on the further details tab to start with. 

The further details tab contains many other useful information fields that are not included on the front screen.

They are on the further details tab because they contain information that is not vital when opening a patient record, but depending on the patient registering at the practice you may find some of them useful to complete.

For example,



Patient source refers to the way the patient found out about the practice. The field contains a drop-down list of options that are added to the maintenance of the system. This is a useful field to complete as it can be reported on and can give to insight into the reasons why patients are registering at the practice and which of your marketing is most effective.