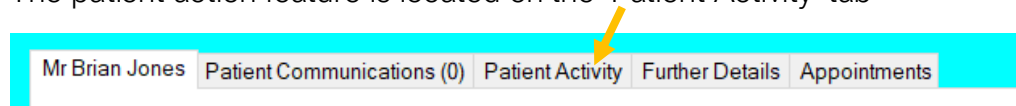
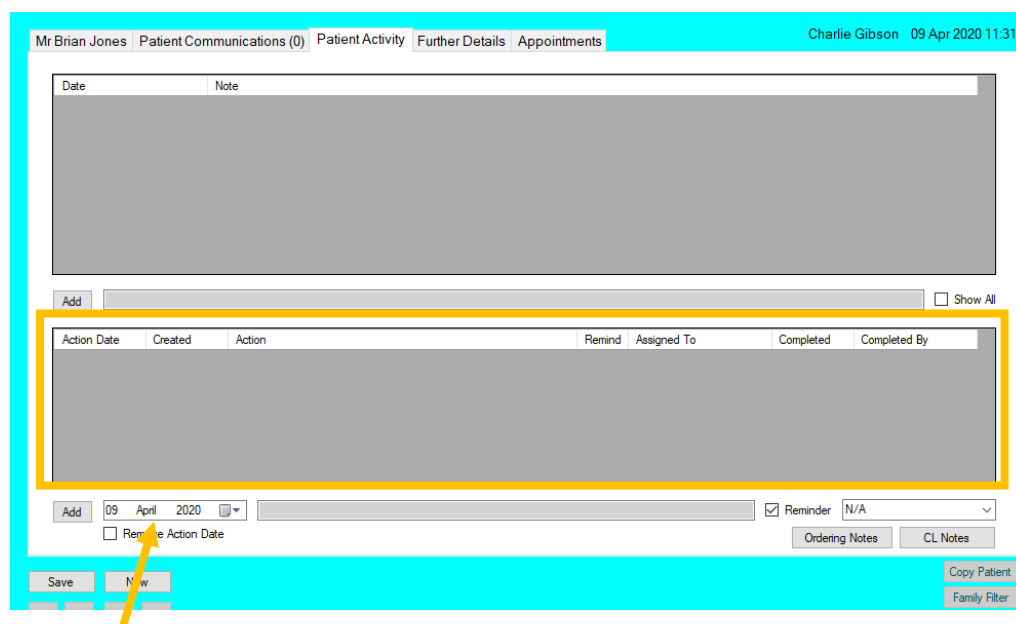


Patient Action Features

The patient action feature is located on the 'Patient Activity' tab



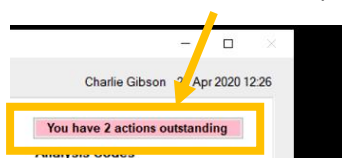
And on the lower half of the form.



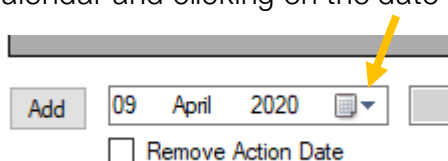
Action Date

This is the date you would like the action to be completed, and therefore it is the date the action will appear on the action list.

(The action list is a list of patient actions that are due or overdue and can be accessed from a button on the top right corner of the main screen.)



You can select the action date by clicking on the arrow next to the date to open a calendar and clicking on the date you would like the action to be done.



Remove Action Date, ticking this box will remove the date associated to this patient action. If a patient action has no date it will not appear on the action list. It will just pop up when a user opens the patient record. (*Patient information pop up on 6*)

Reminder

Reminder

If the reminder box is ticked, then the patient action will pop up when a user opens the patient record.

Removing the tick from the reminder box will stop the patient action from popping up on the opening of the patient record.

Assigned To

This drop-down list allows you to select which users action list the action appears on.

Leaving the 'Assigned To' as N/A will mean the action appears on all users action lists.

Selecting a staff member from the list will mean the action only appears on that users to action list.

You can select a user from the assigned to drop down here.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	N/A		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	<input checked="" type="checkbox"/>	N/A		N/A
13/Oct/2019	08/Oct/2019	new action 2 -- Test	<input checked="" type="checkbox"/>	N/A	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action -- Test	<input checked="" type="checkbox"/>	N/A	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test -- Test	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User

Add 20 April 2020 Reminder N/A

Once the action has been added you can see who the action has been assigned to in this column.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	N/A		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	<input checked="" type="checkbox"/>	N/A		N/A
13/Oct/2019	08/Oct/2019	new action 2 -- Test	<input checked="" type="checkbox"/>	N/A	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action -- Test	<input checked="" type="checkbox"/>	N/A	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test -- Test	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User

Add 20 April 2020 Reminder N/A

Date Completed

For actions that have yet to be completed this box will be empty.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	N/A		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	<input checked="" type="checkbox"/>	N/A		N/A
13/Oct/2019	08/Oct/2019	new action 2 – Test	<input checked="" type="checkbox"/>	N/A	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action – Test	<input checked="" type="checkbox"/>	N/A	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test – Test	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User

Add 20 April 2020 Reminder N/A

Completed actions will have a date in this field and will no longer appear on the action list.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	N/A		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	<input checked="" type="checkbox"/>	N/A		N/A
13/Oct/2019	08/Oct/2019	new action 2 – Test	<input checked="" type="checkbox"/>	N/A	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action – Test	<input checked="" type="checkbox"/>	N/A	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test – Test	<input checked="" type="checkbox"/>	Test User	02/Oct/2019	Test User

Add 20 April 2020 Reminder N/A

To enter a completed date, you can either double click on the date completed field.

This will enter today's date. Or you can single click in the field until you see cursor appear and then type in the date the action was completed.

Completed	Completed By
20/Apr/2020	N/A

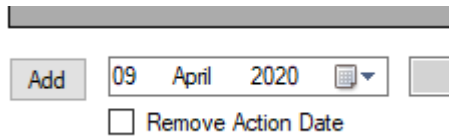
Once saved the completed by field will automatically populate with the name of the user that completed the action within i-Clarity.

Completed	Completed By
20/Apr/2020	Charlie Gibson

Actions will be listed in this box with uncompleted actions at the top and completed actions underneath these. Completed actions will be ordered by the date completed with the most recent date at the top.

Adding a Patient Action

Select the date you would like the action to be completed/appear on the action list or tick the remove action date box.



09 April 2020

Remove Action Date

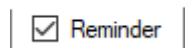
Enter details of the action to be done.



2020

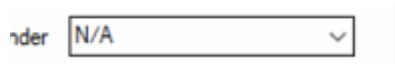
ction Date

Untick the reminder box if applicable



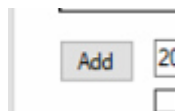
Reminder

If applicable select a i-Clarity user to assign the action to.



Order N/A

Click add.



Add 20

The action will be saved in the main section with an automatically populated created date.

Examples of using the patient action facility.

General Action

A patient action should be added in this way when you want a note to appear on the action list for a particular day and the patient action can be completed by anyone. For example, please call patient to see how they are getting on with their new contact lens prescription.

Enter the date you would like the action to be completed.

Enter details of the action that needs to be completed.

Depending on the content and importance of the action tick or untick the reminder box e.g. if the patient phones before this date does the staff member talking to the patient need to know this information immediately. If yes, then the reminder box should be ticked.

Click Add

Personal Action

A patient action should be added in this way when you want a note to appear on your action list for the day. For example, Ring patient to follow up on the adjustment I made to patient's spectacles.

Enter the date you would like the action to be completed.

Enter details of the action that needs to be completed.

Depending on the content and importance of the action tick or untick the reminder box e.g. if the patient phones before this date does the staff member talking to the patient need to know this information immediately. If yes, then the reminder box should be ticked.

From the 'Assigned To' drop down select your name.

Click Add

Action for another staff member

An action point should be added in this way when you want a note to appear on another member of staff's action list. For Example, please read the GP letter that has been scanned into the patient record.

Enter the date you would like the action to be completed.

Enter details of the action that needs to be completed.

Depending on the content and importance of the action tick or untick the reminder box e.g. if the patient phones before this date does the staff member talking to the patient need to know this information immediately. If yes, then the reminder box should be ticked.

From the 'Assigned To' drop down select the name of the staff member who needs to complete the action.

Click Add

Patient information Pop up

A patient action should be added in this way when you want a pop up to appear on a patients record every time it is opened but the content of the action does not have an expiry date so does not need to appear on the action list. For example, Patient is hard of hearing.

Tick to remove the action date

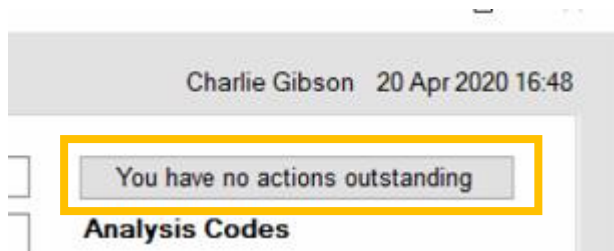
Enter the information you would like to appear on the pop up.

Ensure the reminder box is ticked

Click Add

Viewing Actions To Do

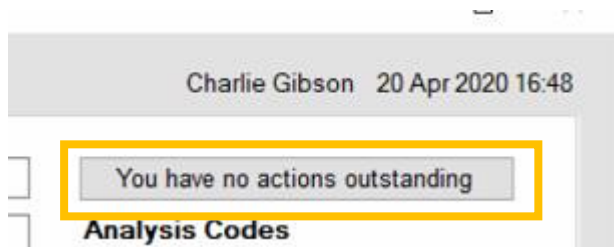
On the top right of the main screen is the notification button.



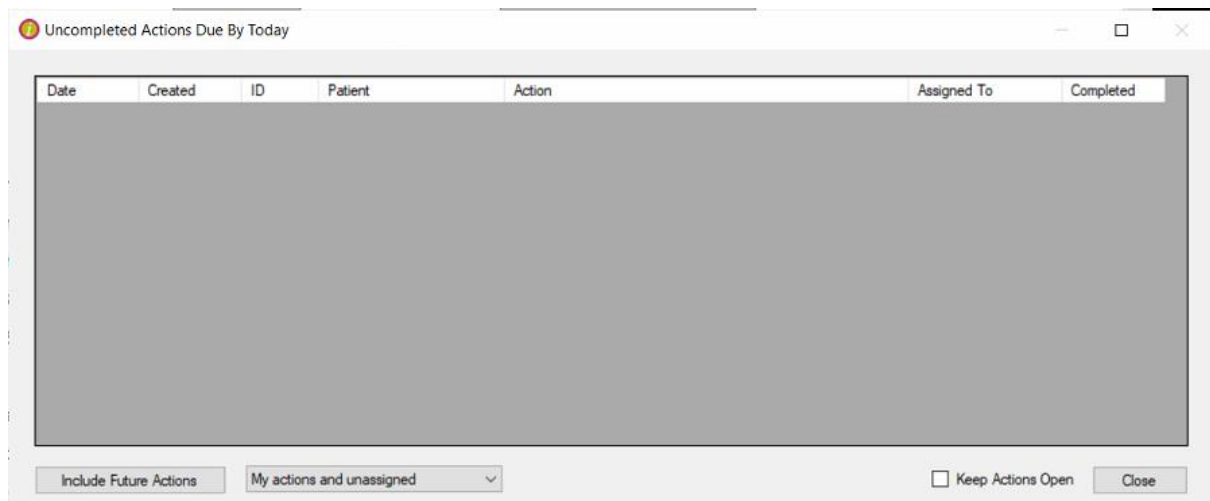
Clicking on this button will show you a list of the actions due or overdue.

This button has 3 different states depending on the actions in the list and the user logged in.

1. You have no actions outstanding.



This state means that there are no unassigned actions due or overdue to be completed and there are no actions due to be completed by the user logged in.



2. You have unassigned tasks pending



This state means that there are unassigned tasks that need to be completed but for the user logged in there are no actions due that are assigned to them.

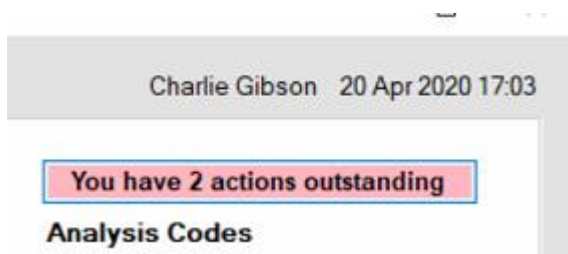
The number will change to represent the number of unassigned actions in the list.

A screenshot of a window titled 'Uncompleted Actions Due By Today'. It contains a table with the following data:

Date	Created	ID	Patient	Action	Assigned To	Completed
20 Apr 2020	20 Apr 2020	2	Mr Robert Grainger	Ring patient to see if new drops are helping - CG		

At the bottom of the window, there are controls: 'Include Future Actions' (checkbox), a dropdown menu set to 'My actions and unassigned', a 'Keep Actions Open' checkbox, and a 'Close' button.

3. You have actions outstanding



This state means that the logged in user has actions outstanding that are assigned to them specifically.

The name of the logged in user is shown above the button. The number will also change to represent the number of assigned action outstanding. Please note, there may also be unassigned actions outstanding.

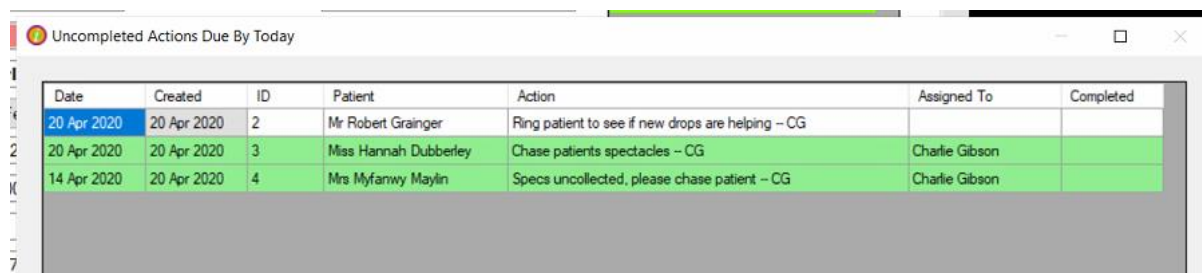
A screenshot of a window titled 'Uncompleted Actions Due By Today'. It contains a table with the following data:

Date	Created	ID	Patient	Action	Assigned To	Completed
20 Apr 2020	20 Apr 2020	3	Miss Hannah Dubberley	Chase patient spectacles - CG	Charlie Gibson	
20 Apr 2020	20 Apr 2020	4	Mrs Myfanwy Maylin	Specs uncollected, please chase patient - CG	Charlie Gibson	

The Action List

By default, the action list shows patient actions that are due today or overdue and actions that are assigned to all users and the user logged in.

Actions assigned to the logged in user are highlighted green,

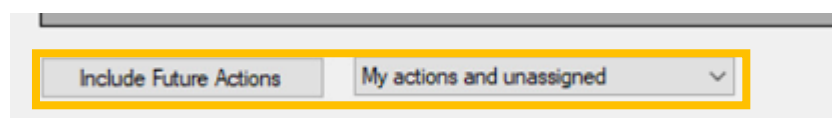


Date	Created	ID	Patient	Action	Assigned To	Completed
20 Apr 2020	20 Apr 2020	2	Mr Robert Grainger	Ring patient to see if new drops are helping - CG		
20 Apr 2020	20 Apr 2020	3	Miss Hannah Dubberley	Chase patients spectacles - CG	Charlie Gibson	
14 Apr 2020	20 Apr 2020	4	Mrs Myfanwy Maylin	Specs uncollected, please chase patient - CG	Charlie Gibson	

When actions become overdue, they become highlighted red on the patient record.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
14/Apr/2020	20/Apr/2020	Specs uncollected, please chase patient - CG	<input checked="" type="checkbox"/>	Charlie Gibson		N/A
	26/Jul/2019	Ensure patient signs voucher on collection.	<input checked="" type="checkbox"/>	N/A		N/A

You can change the view of the action list by amending the selection in the drop-down list and by clicking on the future action button.



Include future actions

Clicking this button, will add future actions to the action list.

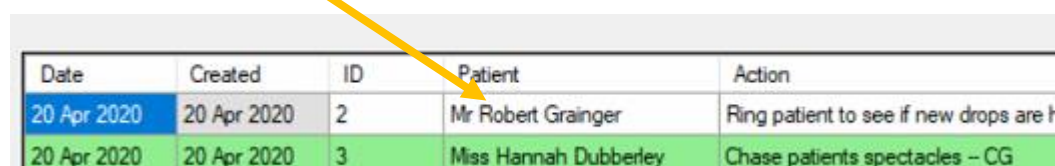
My actions and unassigned drop-down list

The other available views on this drop-down list are; only my actions, only unassigned and all actions.

i-Clarity will remember you last selection and reopen the list with this option already selected. When you log out and log back in the default selection of 'My actions and unassigned' will resume.

Patient Name

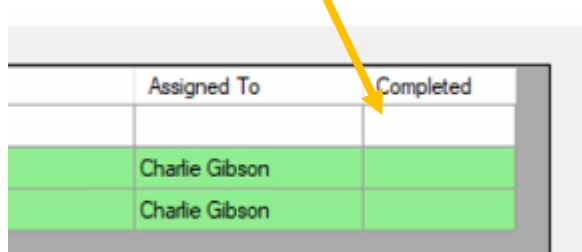
Double clicking on the patient name in the action list will open the patient record on the patient activity tab.



Date	Created	ID	Patient	Action
20 Apr 2020	20 Apr 2020	2	Mr Robert Grainger	Ring patient to see if new drops are helping - CG
20 Apr 2020	20 Apr 2020	3	Miss Hannah Dubberley	Chase patients spectacles - CG

Completed Date

Double clicking on the completed date field in list will enter today's date so that the action is completed.

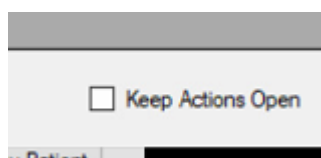


	Assigned To	Completed
	Charlie Gibson	
	Charlie Gibson	

Because the action list is editable, the first person in the practice to open this list will have edit rights and can complete patient actions from the list. Any other user opening the list whilst the first user still has it open will only have read rights. This means they cannot sign off patient actions from the list, but they can double click to open patient records and sign off actions directly from the record after they have been completed.

Keep action list open.

Ticking this box will keep the action list open, this means when you double click to view a patient record the action list does not automatically close.



Keep Actions Open