

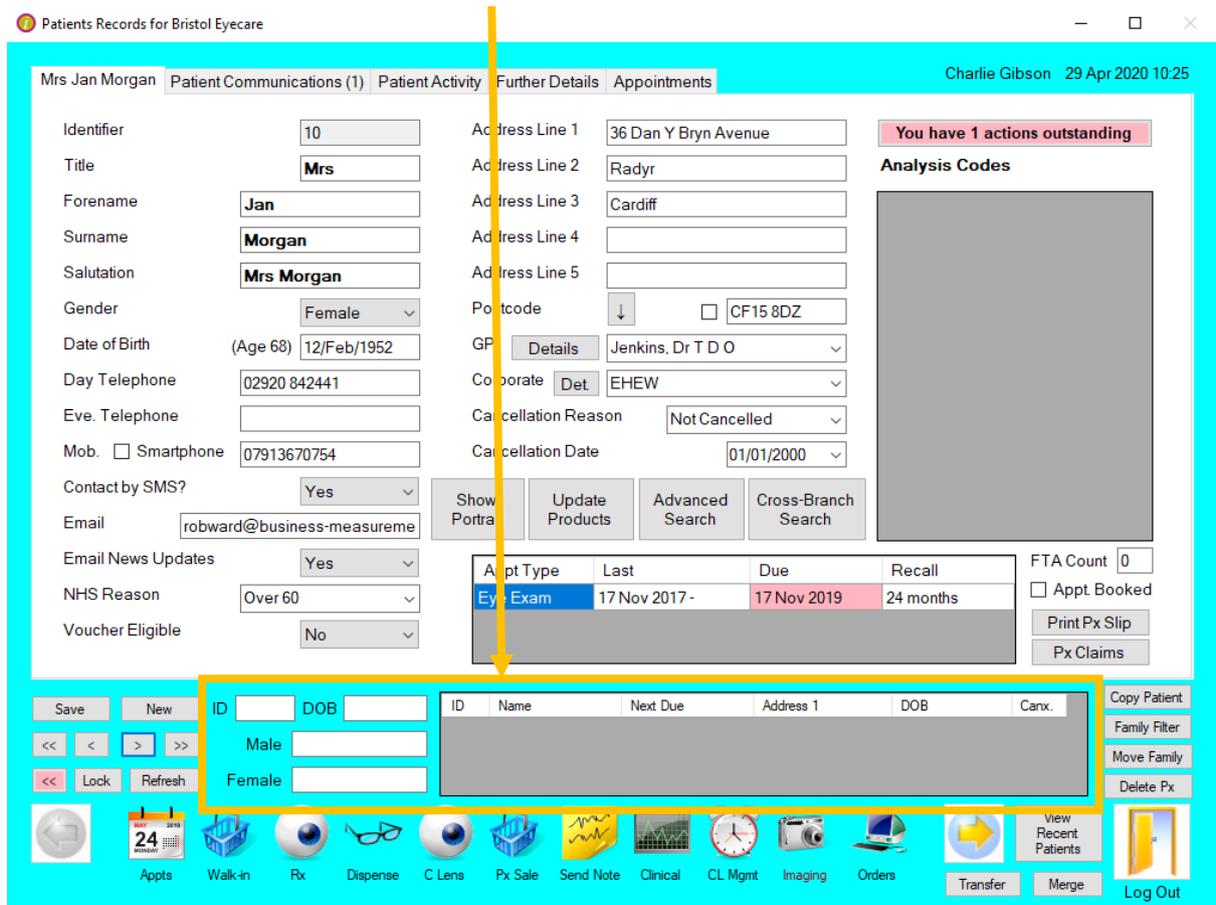


# Searching for an existing patient record

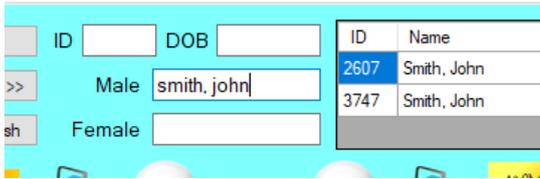
i-Clarity Version 3.2.9

The second way to make a patient record active is to search for an existing record and select it from the search results list.

The main search area is located at the bottom of the main i-Clarity screen.



1. You can type a patients ID number into the ID field, the patient record allocated this ID will be displayed in the search box to the right. If you double click on this line or press enter on your keyboard, then the record will display in the top section of the form and the record will become active.
2. You can also type the patients date of birth in the date of birth field, once you have entered the date of birth press enter on your keyboard to start the search, and patients with this date of birth will be displayed in the search results box. Double click on the patient record you would like to activate.
3. To search for a patient by name then you should type in either the male or female search fields. The patients name should be typed in the following format: surname comma space first name.



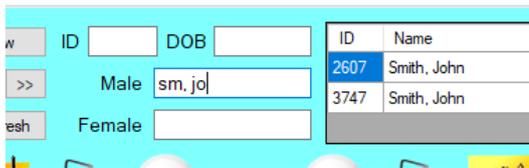
as you type the name the possible options in the search results box will reduce. Again, if you double click on the patient record you are searching for in this box it will become active.

It is the comma space that you type in the name field search box that signifies to the system you are switching the search from surname to first name.

You can use this comma space at any point when typing the name for example. If you have a quite common, long or difficult to spell surname you may only wish to type the first few letters on the surname followed by the comma space and then the first name.

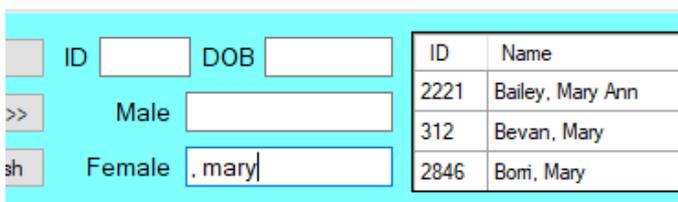
For example: sm, jo

The system is searching for any patients whose surname begins sm and whose first name begins jo

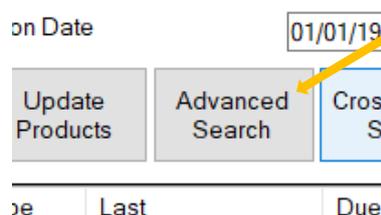


You could also type the comma space into the name field first followed by the first name for example: , mary.

The system is now ignoring patient surnames and just searching for patient records with the first name Mary.



i-Clarity also has an advanced search facility. The button for this is located close to the centre of the main form.



Clicking on this button opens the advanced search facility where you have other search fields such as phone or postcode.

Type the information you have in the relevant field of the advanced search window.

Then click ok.

The results from the search will be displayed in the search results box on the main form

Appt Type	Last	Due
Eye Exam	18 Jul 2019 -	19 Jul 20

ID	Name	Next Due	Address
1940	Smith, Sarah	16 Feb 2011	41 Blethin
3492	Smith, Sue	31 Mar 2014	22 Wingfie
871	Smith, Thomas	06 Jan 2013	3 Heol Ara

Any of the search criteria typed into any of the fields of an advanced search will contain approximate matches, so if you typed the letter 'a' into the name field all matches will be shown where the letter 'a' is contained in the word.

*The one exception to this is the global system identifier which has to be an exact match, so if the identifier was 12345, entering 12 would not bring up this record, only entering the exact match of 12345 would.*

The name fields correspond to any matches that are found in either the forename or surname fields. For example a search of 'jo'

Results in the search grid will show patients that have a 'jo' included in either their forename or surname.

ID	Name	Last Specs Visit	Address 1	DOB	Canx.	^
118	Fondant, Joe		6 Viper Road	01-Jan-1972 (42)		
119	Green, Jo		45 Plain Close	01-Jan-1984 (30)		
120	Johnson, Derek		11 Aylesbury Drive	01-Jan-1990 (24)		∨

The address field corresponds to any matches found in Address line 1 – 5 on the patient record.

The postcode field corresponds to any matches found in the postcode field

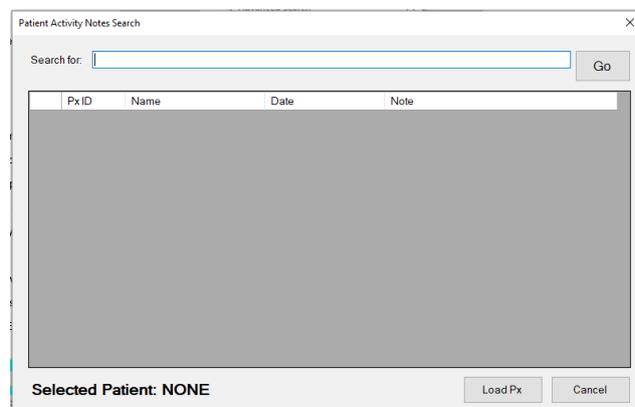
The telephone field corresponds to any matches found in the day, evening or mobile fields on the patient record.

The notes fields corresponds to any matches in any text written in the notes box on the further details tab on the patient record.

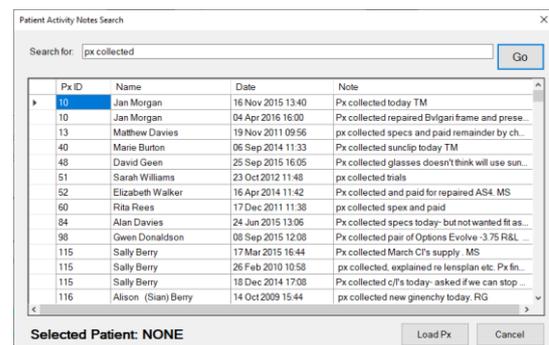
The email field corresponds to any matches found in the email field on the patient record.

The global system identifier field corresponds to an exact match found in the further details tab on the patient record.

Search patient activity notes will bring up a new window.

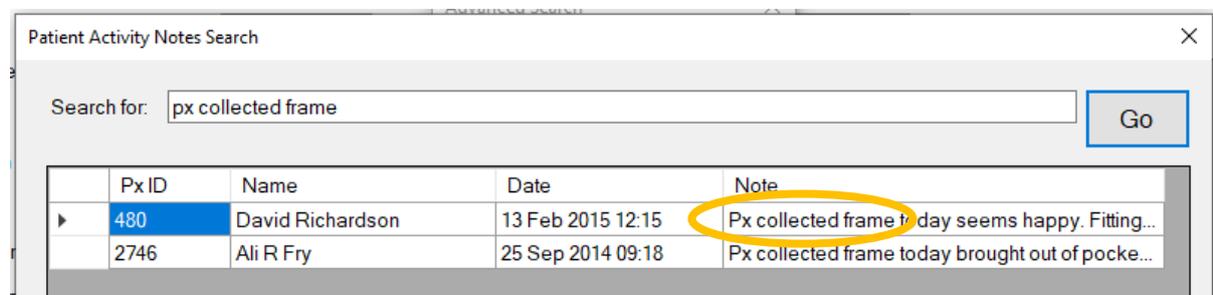


Text typed into the search for field will be crossed referenced against notes made in the patient activity section of the patient record. Clicking the GO button will display the results of the search in the grey field underneath.



If more than one word is typed into the 'search for' field, then the series of words search will be an exact match for the series of words in the patient activity.

For example, Searching for 'Px collected frame' will display the following results.



It will not display this record because the series of words searched did not match exactly.



If applicable i-Clarity also has a cross branch search which will allow you to search for patients across more than one branch. Clicking the cross-branch search near the centre of the main form will open the cross-branch search facility.

Not Cancelled   
 01/01/1900   
 Advanced Search  Cross-Branch Search

	Due	Recall
19 -	19 Jul 2019	N/A

Cross-Branch Search

Please choose your search criteria:

Forename  DOB  
 Surname  Email

Branch	ID	Patient	Sex	DOB	Address 1	Canx
--------	----	---------	-----	-----	-----------	------

Select a patient to:  Selected patient:

To use the cross-branch search, tick the box next to the name of the fields you want to search. Type the information you have into that field and then click 'search'.

The results of your search will be displayed in the results box in this window.

Cross-Branch Search

Please choose your search criteria:

Forename   DOB  
 Surname   Email

Branch	ID	Patient	Sex	DOB	Address 1	Canx
Newbury Eyecare	8591	Smith, Ann	F	08 Nov 1947	39 Mynachdy Road	
Newbury Eyecare	13091	Smith, Ann	F	03 Apr 1943	64 Chariot Rd	
Bristol Eyecare	2498	Smith, Anna	F	15 Mar 1982	78 Timothy Rees Close	
Bristol Eyecare	2326	Smith, Annie Scott	F	18 May 1915	16 Cefn Mount	
Bristol Eyecare	3529	Smith, Hannah	F	08 Nov 2008	22 Wingfield Road	
Newbury Eyecare	14402	Smith, Hannah	F	03 Jul 1996	30 Cwrt Y Goedwig	
Newbury Eyecare	2493	Smith, Joanne	F	01 Jan 1977	39 Byrd Crescent	
Newbury Eyecare	16365	Smith, Suzanne	F	01 Jan 1900	31 Maes Y Llech	

Select a patient to:  Selected patient:

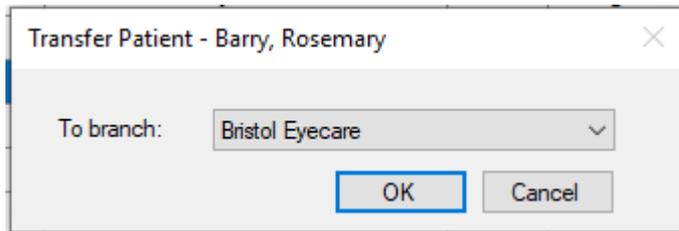
Double click on the patient record you are looking for.

This will populate the selected patient field with the patients name.

Searching for an existing patient record v3 2 9 001

The click on one of the 3 options at the bottom of the window.

1. Log in to this Patients Branch – i-Clarity will automatically log you into the branch this patients record is located at and will make that patient record the active patient.
2. Transfer this Patient to Another Branch – This will open a new window with a drop down list of the available branches you could transfer a patient to.



This will transfer the patient record and advise you of the patients new ID number in that branch.

3. Book this Patient an Appointment at their own Branch – This will open the appointment diary for the branch this patient record is located at. Once you have booked the appointment and close the appointment diary you will be returned to the branch you were originally logged into.