

-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.

0	Patients Records for Bristol Eyec	care					- 🗆 ×
	Mrs Jan Morgan Patient Co	ommunications (1) Patie	nt Activity	Further Details	Appointments	Charlie G	ibson 29 Apr 2020 10:25
	Identifier	10	Ac	dress Line 1	36 Dan Y Bryn Avenue	You have 1 acti	ions outstanding
	Title	Mrs	Ad	dress Line 2	Radyr	Analysis Codes	
	Forename	Jan	Ad	fress Line 3	Cardiff		
	Surname	Morgan	Ad	Iress Line 4			
	Salutation	Mrs Morgan	Ad	lress Line 5			
	Gender	Female ~	Po	tcode	↓ CF15 8DZ		
	Date of Birth (A	Age 68) 12/Feb/1952] GP	Details	Jenkins, Dr T D O 🗸 🗸 🗸		
	Day Telephone	02920 842441	Co	porate Det.	EHEW ~		
	Eve. Telephone		Ca	cellation Reas	on Not Cancelled ~		
	Mob. 🗌 Smartphone	07913670754	Ca	cellation Date	01/01/2000 ~		
	Contact by SMS?	Yes ~	Show	Update	Advanced Cross-Branch	1	
	Email robward	l@business-measureme	Portra	Product	s Search Search		
	Email News Updates	Yes ~	A	pt Type	Last Due	Recall	FTA Count 0
	NHS Reason	Over 60 ~	Ey	Exam 1	7 Nov 2017 - 17 Nov 2019	24 months	Appt. Booked
	Voucher Eligible	No ~					Print Px Slip Px Claims
	Save New ID	DOB	ID	Name	Next Due Address 1	DOB	Canx. Copy Patient
	« < > »	Male					Move Family
	< Lock Refresh Fe	emale					Delete Px
				Re Sala Sand N			View Recent Patients
	Appts Walk-	n rx Dispense	C Lens	LY Sale Seud IN	ote omical of myrnt infaging	Transfer	Merge Log Out

- 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.

	ID	DOB		ID	Name
		-		2607	Smith, John
>>	Male	smith, j	ohn	2747	Cash Jahr
				3/4/	Smith, John
sh	Female				

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

		_			
N	ID	DOB		ID	Name
		- 1		2607	Smith, John
>>	Male	sm, joj		3747	Smith, John
esh	Female				
1			/		

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.

ID	DOB	ID	Name
Mala		2221	Bailey, Mary Ann
>> iviale		312	Bevan, Mary
sh Female	, mary	2846	Borri, 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.

	Advanced Search X	Type the informa search window.	tion y	ou have in th	ne relevant fi	eld of th	e advanced
	Search name fields:	Then click ok.					
	Search address fields:	The results from	the se	earch will be	displayed in	the sea	rch results
	Search postcode field:	box on the main t	from			/11/190	
	Search telephone fields: ed		Shor	w Update ait Products	Advanced Search	Cross-B Sear	
S	Search notes field:	~	/	Appt Type La	ist	Due	
1	Search email field:	~			5012013	13 301 20	
	Or find global system identifier:	_					
			ID	Name	Next Due	Addree	
			1940	Smith, Sarah	16 Feb 2011	41 Blethin	
ID	Search Patient Activity Notes Ac		3492	Smith, Sue	31 Mar 2014	22 Wingfie	
222	OK Cancel 25		871	Smith, Thomas	06 Jan 2013	3 Heol Ara	
840	Dollit, Mary 14 Dec 2013 56			In mer	- <u>2</u>	Q (1997)	

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'

Search name fields:	
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.

tient Activity Notes S	Search				
Search for:					Go
Px ID	Name	Date	Note		
Selected Pa	atient: NONE			Load Px	Cancel
Selected Fa				Load PX	Canc

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.

Sea	rch for: px	collected		Go
_	Px ID	Name	Date	Note
Þ	10	Jan Morgan	16 Nov 2015 13:40	Px collected today TM
	10	Jan Morgan	04 Apr 2016 16:00	Px collected repaired Bvlgari frame and prese
	13	Matthew Davies	19 Nov 2011 09:56	px collected specs and paid remainder by ch
	40	Marie Burton	06 Sep 2014 11:33	Px collected sunclip today TM
	48	David Geen	25 Sep 2015 16:05	Px collected glasses doesn't think will use sun
	51	Sarah Williams	23 Oct 2012 11:48	px collected trials
	52	Elizabeth Walker	16 Apr 2014 11:42	Px collected and paid for repaired AS4. MS
	60	Rita Rees	17 Dec 2011 11:38	px collected spex and paid
	84	Alan Davies	24 Jun 2015 13:06	Px collected specs today- but not wanted fit as
	98	Gwen Donaldson	08 Sep 2015 12:08	Px collected pair of Options Evolve -3.75 R&L
	115	Sally Berry	17 Mar 2015 16:44	Px collected March CI's supply . MS
	115	Sally Berry	26 Feb 2010 10:58	px collected, explained re lensplan etc. Px fin
	115	Sally Berry	18 Dec 2014 17:08	Px collected c/l's today- asked if we can stop
	116	Alison (Sian) Berry	14 Oct 2009 15:44	px collected new ginenchy today, RG

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.

Patient A	Activity Notes	Search		×
Sear	ch for: px c	collected frame		Go
	Px ID	Name	Date	Note
•	480	David Richardson	13 Feb 2015 12:15	Px collected frame to day seems happy. Fitting
2746 Ali R Fry		Ali R Fry	25 Sep 2014 09:18	Px collected frame today brought out of pocke

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

			10	Jan Morgan	04 Apr 2016 16:00	Px collected repaired Bvlgari frame and prese
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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 Cance 01	lled ~ /01/1900 ~					
Advanced Search	Cross-Branch Search					
	Due	Recall	-			
)19 -	19 Jul 2019	N/A	-			
Cross-Branch Search Please choose Forename Surname Branch	ch your search criteria: D E ID Pate	OB mail	Search Sex DOB	Address 1	Canx	To use search to the you wa the info into the click 's
Select a patien Log in to this Pat Branch	t to: Transfer this Patient to Another Branch	Book this Patient an App at their own Branc	Selected patier	nt:	Close	The re will be results

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.

2	Forename ann Surname smith		DOB		Search		
_	Branch	ID	Patient	Sex	DOB	Address 1	Canx
۲	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	
Se	elect a patient to:	ransfer this P	atient to Book this Patient an	Appointn	Selected patient	ent:	Close

Double click on the patient record you are looking for.

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

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.

Transfer Patient	ransfer Patient - Barry, Rosemary						
To branch:	Bristol Eyecare	~					
	ОК Са	ncel					

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.