

To access the area of the system where recall communications can be sent, click on the yellow arrow on the right-hand side of the module icons at the bottom of the page.



This will display a new set of icons.

Click on the printer icon called 'Recall'



Sending Recall Communications

Recalls that are due to be sent will be listed in the grey box on the left-hand side of the screen. When you first open this screen, the box will be empty.



To control what recall communications are displayed in this grey box firstly change the 'Up To' date in the list box on the left-hand side of the screen.

Туре	Up To	Number
CL Visit	05/Dec/2014	15
None	05/Dec/2015	U
Eye Exam	07/Jan/2017	27
Specs Col	06/Jan/2015	7
Specs Rec	10/Jul/2014	1
CLs Rec	18/Aug/2015	0
Other Exam	07/Jan/2017	0
	Total	50

The up to date corresponds the communication send date in the patients communications tab.

Ir Tommy Parsons	Patient Communications (2)	Patient /	Activity Further Details	Appointn ents		Char	rlie Gibson 19 May 202
			🗌 Stop Al	I Recalls Las	st Booked Appoint xt Booked Appoin	ment tment	27/10/2015
Recall Scheme	es		Communications Per	nding			
[CL] CL12		^	Decall Scheme	Sequence	Send	ommur	nication Stage
[ST] 12 months			Recail Scheme	No	Date	ommu	lication Stage
[CL] CEC C Lens	Wearer		[ST] 12 months	3	07/Feb/2017	2 month	s Stage 3
[CL] CL24			[CL] CL12	1	14/Nov/2020	L12 Sta	ge 1
[CL] CL6							
[CL] OS CL Wea	rers (Eyeplan)						
[CL] OS CL Wea	rers (Sauflon)						
[CL] OS CLs 1 Ye	ear		Communications Ser	nt			Show Due Date
IMICOLOL Trials	1 at Time Weeter						

Therefore, if you wanted to send all the communications that were due to go out for the next month you would move the date to the end of the next month.

If you wanted to send out all the recall communications that were due up to today, then you would set the up to date to today's date.

Туре	Up To	Number
CL Visit	05/Dec/2014	15
None	05/Dec/2015	0
Eye Exam	07/Jan/2017	27
Specs Col	06/Jan/2015	7
Specs Rec	10/Jul/2014	1
CLs Rec	18/Aug/2015	0
Other Exam	07/Jan/2017	0
« < > >>	Total:	50

You can amend the 'Up To' date by either clicking in the date field until the date is highlighted and then overtype with the new date. Or you can click on the arrows underneath the list. The single arrow moves all the dates in the list on a day from the dates shown. The double arrow moves all the dates on a week from the current date shown.

It is important that you find out how your i-Clarity recalls have been set up before you send the recall communications. i-Clarity recall set up allows you to create a default recall send date that is different to the due date of the patient. This means that your system could be set to create communication send dates earlier than the due date. If this is the case you do not want to set you 'Up To' date to far into the future, as a NHS patient may get a recall much earlier than they are allowed to be seen for another sight test.

Then click generate

Recall					- 0	×
Tuesday 19 May 2)20				Send Selected Comm	nunications	
Scheme Type 📶 🗸	Scheme Name		~	Send Communications of Type	e: Export	~
Generate Communications	Scheme Stage			Send All Communi	cations	
Communication	Total	Туре		Up To	Number	
		CL Visit		05/Dec/2014	15	
		None		05/Dec/2015	0	
		Eye Exa	m	07/Jan/2017	27	
		Specs C	ol	06/Jan/2015	7	
		Specs R	ec	10/Jul/2014	1	
		CLs Rec		18/Aug/2015	0	
		Other Ex	am	07/Jan/2017	0	
		<< <	> >>	Total:	50	

A list of communications will be displayed in the box with the number of recall letters due to be send for each communication.

Recall				- 🗆
Tuesday 19 May 2020			Send Selected Comm	unications
Scheme Type All ~	Scheme Name	~	Send Communications of Type:	Export
Generate Communications	Ocheme Olage		Send All Communic	ations
Communication	Total	Туре	Uр То	Number
1st Vari email	1	CL Visit	05/Dec/2014	15
1st Vari Letter	2	None	05/Dec/2015	0
CL 6 Month Optional Reminder	5	Eye Exam	07/Jan/2017	27
CL 6 Month Optional Reminder Email	7	Specs Col	06/Jan/2015	7
CL 6 Month Reminder Email	1	Specs Rec	10/Jul/2014	1
CL12 Stage 1 Adult Email	2	CLs Rec	18/Aug/2015	0
Diabetic 12 Month S1 SMS	1	Other Exam	07/Jan/2017	0
Specs 12 Month S1	2			
Specs 12 Month S1 Child	1		Total	50
Specs 12 Month S1 Email	4		rota.	50
Specs 12 Month S1 SC	2			
Specs 12 Month S1 SC email	3			
Specs 12 Month S1 SC SMS	1			
Specs 12 Month S1 SMS	2			
Specs 24 Month S1 Adult Email	5			
Specs 24 Month S1 SC Email	2			
Specs 24 Month S1 SC Letter	1	View Recipients	s For All Communications	
Specs Disp Voucher Email	4			
Specs Ready Email	1			
Test Elsewhere Adult Email	2	View Recipients F	or Selected Communication	
Test Elsewhere Adult Letter	1			
		View Recipients For Se	elected Letter Sorted By Address	

There are now several ways to send this list of generated communications.

1. Click 'Send all communications'



This will send all the communications listed in the box

2. 'Send communications of type'



This will send the communications of one type e.g. SMS

Firstly, select from the drop down list the type of communication you would like to send. Then click 'send communications of type:'

3. Send selected communications



CL 6 Month Optional Reminder	5	
CL 6 Month Optional Reminder Email	7	
CL 6 Month Reminder Email	1	
CL12 Stage 1 Adult Email	2	
Diabetic 12 Month S1 SMS	1	
Specs 12 Month S1	2	
Specs 12 Month S1 Child	1	

This will send the communications that have been preselected.

To select a communication or multiple communications select the tick box(es) next to the communication name.

Then press send selected communications

If you do set the 'Up To' date in the future it is very important that you complete the sending of all the recall communications in one go and you do not go in and out of the recall module or repress the 'generate communications' button.

This is because the list of communications due to go is calculated from afresh every time you click the generate communications button.

Second and subsequent recall send dates are calculated from the send date of the previous recall communication plus the number of days specified in the maintenance of you i-Clarity.

For example, if you set the 'Up To' date a month in the future. When you press 'generate communications' a list of recalls due to be sent in the next month will be displayed. When you send these communications a send date of today will be recorded against the recall in the communications sent information of the patient record.

Patient Communications (2)	Potiont Activity	Eurthor Dotails	Appointmor	te		Charlie	Gibson 19 May 202	20 13:38
	Fatient Activity	i uniter Details	Appointmen	11.5				
		Stop All	Recalls	Last	Booked App	ointment	27/10/2015	
				Nov	t Looked Apr	ointment		
				INEX				
nes	Comm	unications Per	nding					
5	^ Recal	IScheme	Se N	equence	Send Dite	Communica	ation Stage	
ns Wearer	[ST] 12	2 months	3		07/1 eb/201	7 12 months S	tage 3	
	[CL] CL	.12	1		14/Npv/202	0 CL12 Stage	1	
arers (Eyeplan)								
arers (Sauflon)								
Year	Comm	unications Ser	nt				Show Due Da	te
ls 1st Time Wearer						_		
Is Existing Wearer	Recal	Scheme	Se N	equence	Date Sent	Communica	ation	î
Varis	ISTI 12	months	2	-	09/Dec/201	6 Specs 12 M	onth S2 Child	
Up 6	ISTI 12	months	1		19/Oct/2016	Specs 12 M	onth S1 Child	
Up Varis	ISTI 12	months	1		03/Oct/2019	5 Specs 12 M	onth Child	
an	[ST] 12	months	2		27/Sop/201	4 Space 12 M	onth Child Do Dom	-
months	[ST] 12	monthe	1		13/Aug/201	4 Spece 12 M	onth Child	·
iback	V [ST] 12	months	1		11/ Jul/2012	r ppecs 12 M	onth Child	~

If your system is set up for the next communication to be sent 14 days later than the previous communication its send date will be 14 days from today. This is shown in the communication pending send date.



If your 'UpTo' date in the recall system is more a month in the future, if you click generate communications again this next recall communication for the patient will be listed and if you click send the patient will receive a reminder communication on the same day they received their original recall.

Other features of the recall screen.

One feature of the recall module is you can filter the list of communications you generate in the grey box.

Recall				- 0	×
Tuesday 19 May 2020		Sen	d Selected Commu	inications	
Scheme Type	Scheme Name	Send Comm	unications of Type:	Export	~
Genera - Communications	Scheme Stage	5	Send All Communic	ations	
Communication	Total	3	Uр То	Number	
	CL Vis	sit	05/Dec/2014	15	- 11
	None		05/Dec/2015	0	
	Eye E	xam	07/Jan/2017	27	
	Spece	s Col	06/Jan/2015	4	
	Spece	s Rec	10/Jul/2014	1	_
	CLs R	ec	18/Aug/2015	0	- 1
	Other	Exam	07/Jan/2017	0	_
	<<	< > >>	Total:	47	

To do this select from the scheme type drop down the type of scheme you are interested in.

Scheme Type	ə <mark>All</mark>	~			
For example, C	L Visit or Eye Exam				
Scheme Type	CL Visit	✓ Scheit	me Name	N/A ~	
Solocting a Sch	omo Typo will activato the p	ovt field Su	ohomo Na	ma	

Selecting a Scheme Type will activate the next field Scheme Name.

You can either now click generate communications to see all communication for that type or you can break this selection down into a smaller list again. To do this after selecting the scheme type then select the scheme name before clicking generate communications.

Scheme Type	CL Visit ~	Scheme Name	N/A	~

You can also break down the list of communications by stage, for example stage 1 = first reminder, stage 2 = second reminder and so on.

To do this enter a number into the scheme stage box and then click generate.

Tuesday 19 May 2020	
Scheme Type All ~	Scheme Name
Generate Communications	Scheme Stage

(Scheme stage filter can be done independent or in conjunction with scheme type and name.)

Using the filter method that breaks down the communication generated list into smaller chucks means you are repeatedly pressing the generate communications button, and i-Clarity is then repeatedly checking all the patient's communications send date. So, it is not advised you do not set an 'Up To' date to far into the future.

If you do need to set an 'Up To' date in the future because you need to be ahead of your recalls for any reason <u>and</u> you are concerned you may be interrupted (therefore have to exit the recall module before sending all of the recalls). You can use the Scheme Stage filter to prevent patients receiving multiple stage recalls.

Start by generating recalls for your last recall stage (this is listed in maintenance).

For example, if a system is set up with 3 recall stages you would enter the number 3 into the Scheme Stage field.

Generate Communications

Scheme Stage 3

Then click generate. This will send all the stage 3 communications already due in the system.

You would then enter the number 2 into the scheme stage field and generate and send the listed communications.

Because you have already sent the stage 3 communications the new stage 3 communications that are now pending will not get sent

You would then finally enter a number 1 into the scheme stage field and generate and send the first recall communications.

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Another feature of the recall module if the ability to preview the recipients of the communications pending.

Along the bottom of the screen are 3 buttons.

1. 'View Recipients for all communications'



This will show a list of all the patients who have a communication in the list shown in the grey box

2. 'View Recipients for selected communications'



communication in the selected recall(s) in the grey box.



3. 'View receipts for selected letter sorted by Address'



Firstly, select a letter communication from the grid.

Then click 'View Recipients for Selected Letter Sorted by Address'

This will produce a report showing you all the

recipients with their addresses. Patients with the same address will be listed next to each other in the report.