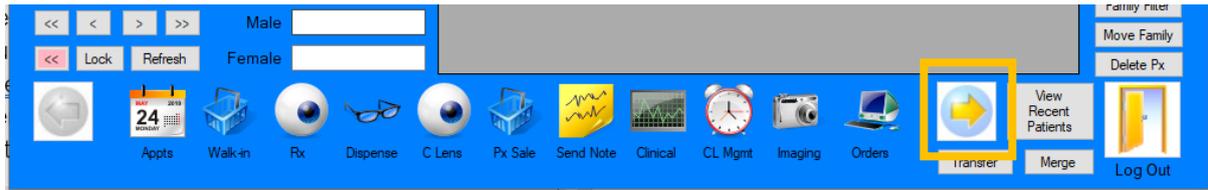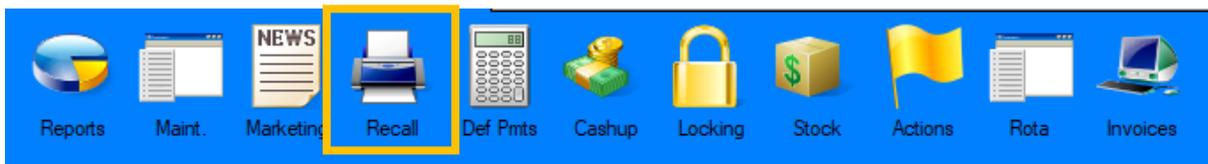# Sending Recall Communication
i-Clarity Version 3.2.9

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.
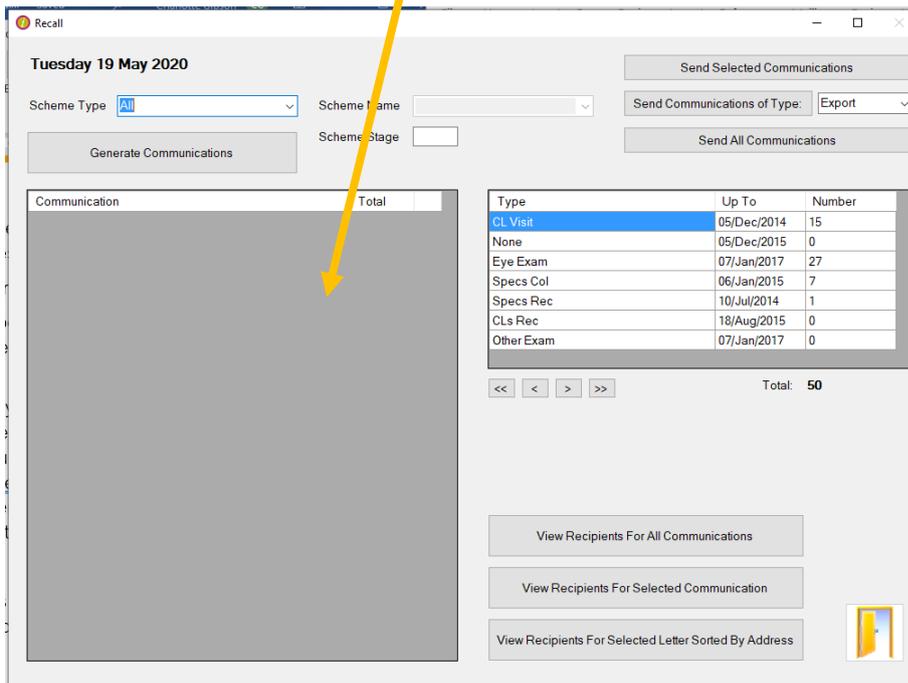

This will display a new set of icons.

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.

Type	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 |

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

Mr Tommy Parsons | Patient Communications (2) | Patient Activity | Further Details | Appointments | Charlie Gibson 19 May 2020 12:56

☐ Stop All Recalls | Last Booked Appointment | 27/10/2015

Next Booked Appointment |

Recall Schemes

[CL] CL12
[ST] 12 months
[CL] CEC C Lens Wearer
[CL] CL24
[CL] CL6
[CL] OS CL Wearers (Eyeplan)
[CL] OS CL Wearers (Sauflon)
[CL] OS CLs 1 Year
[MISC] CL Trials 1st Time Wearer

Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	3	07/Feb/2017	12 months Stage 3
[CL] CL12	1	14/Nov/2020	CL12 Stage 1

Communications Sent | Show Due Date

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.

| Type	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

A list of communications will be displayed in the box with the number of recall letters due to be send for each communication.
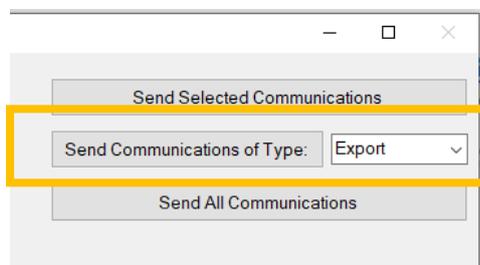
There are now several ways to send this list of generated communications.

1. Click 'Send all communications'
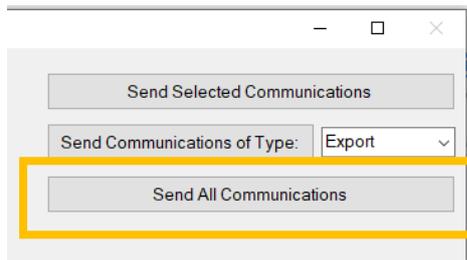
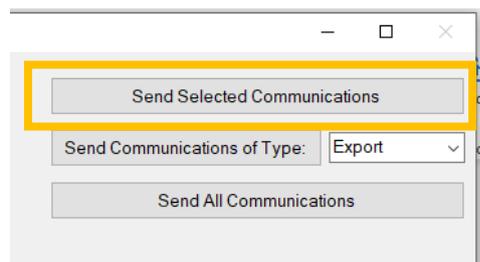This will send all the communications listed in the box

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

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.

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.
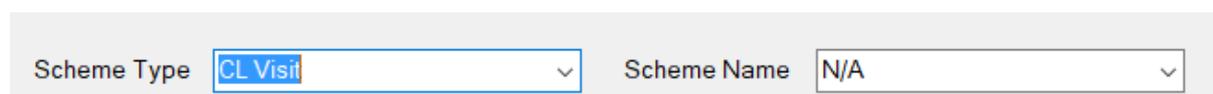
Other features of the recall screen.

One feature of the recall module is you can filter the list of communications you generate in the grey box.
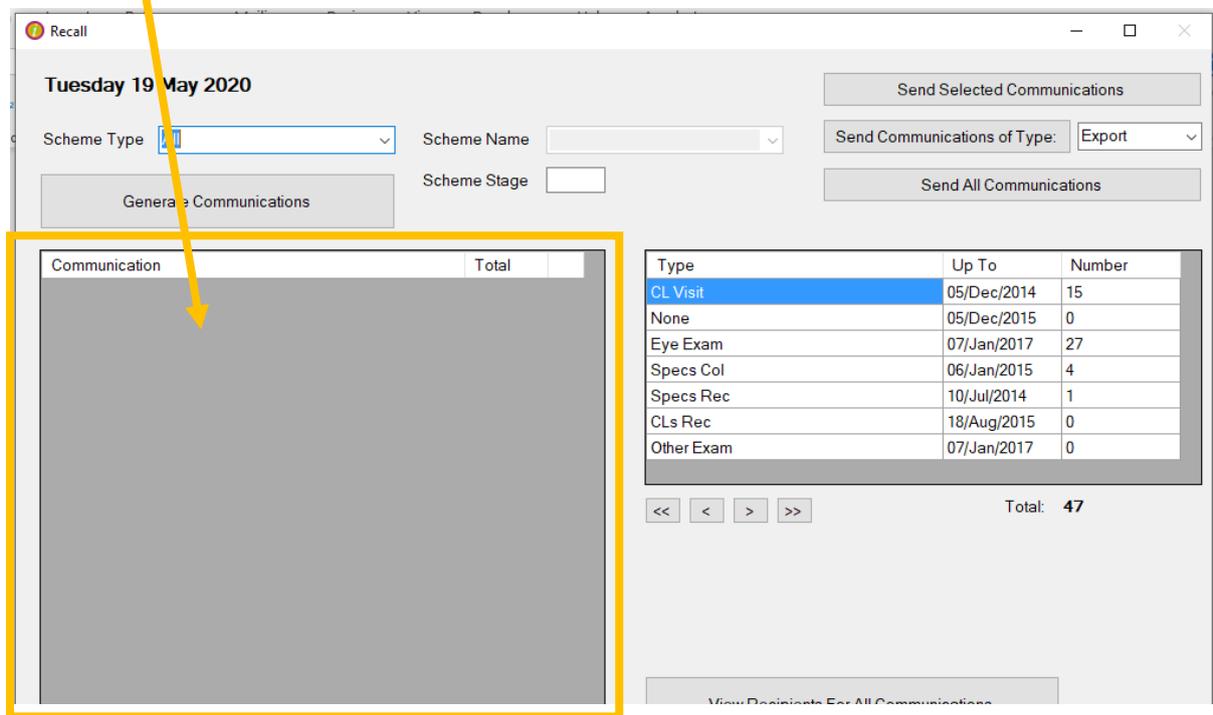
To do this select from the scheme type drop down the type of scheme you are interested in.
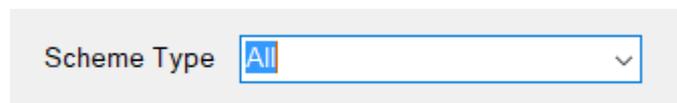
For example, CL Visit or Eye Exam

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.

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.

Another feature of the recall module if the ability to preview the recipients of the communications pending.
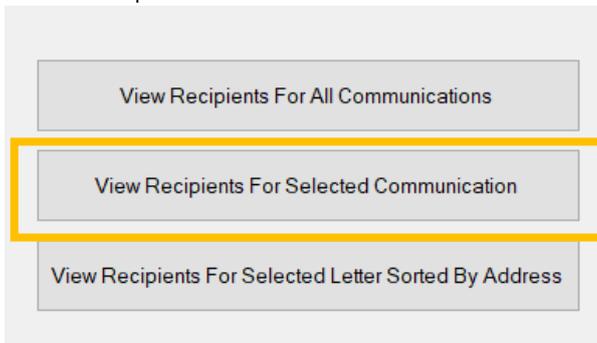
Along the bottom of the screen are 3 buttons.

1. 'View Recipients for all communications'
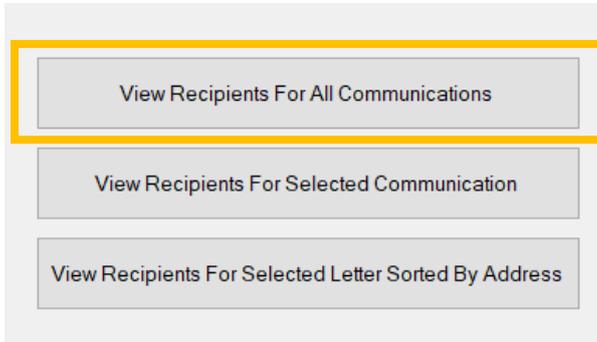
This will show a list of all the patients who have a communication in the list shown in the grey box

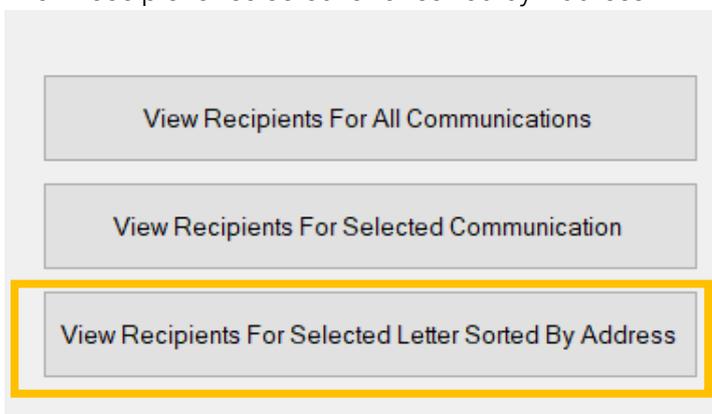2. 'View Recipients for selected communications'

This will show a list of the patients who have a communication in the selected recall(s) in the grey box.

Selected Recalls

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.