Clinical set up

i-Clarity Version 3.2.9

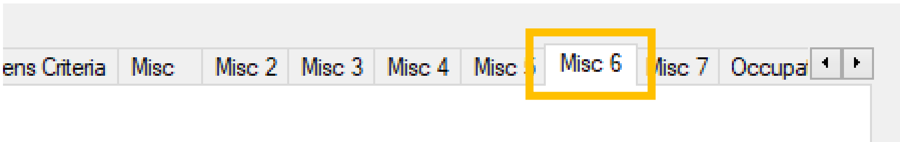
Contents

Other Exam Name and Types

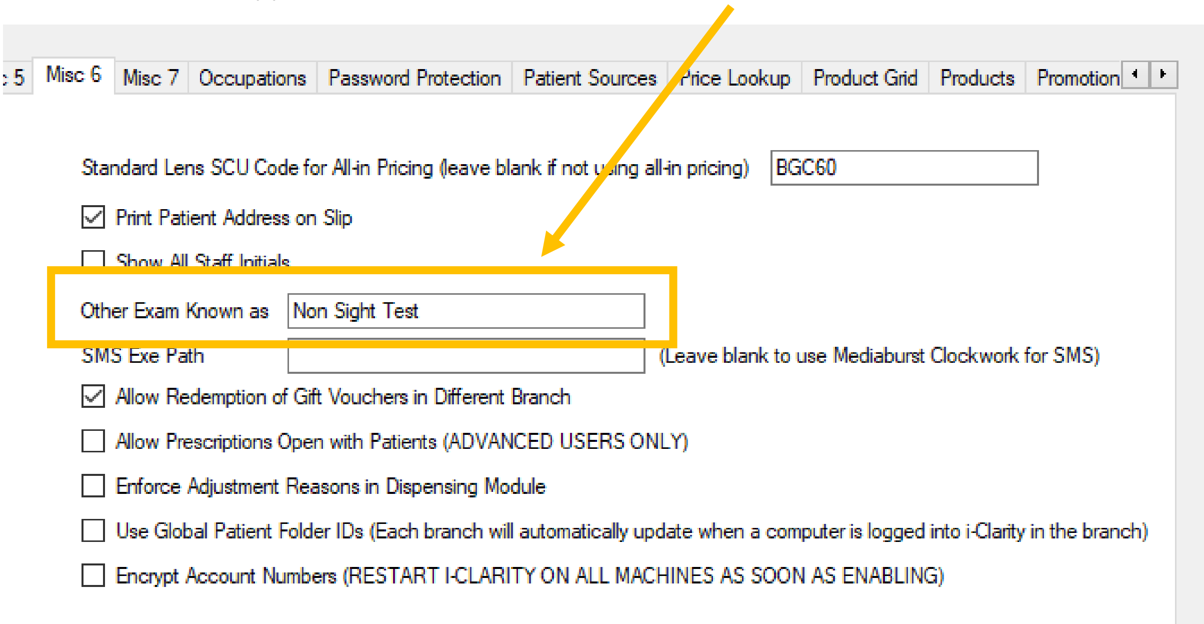
i-Clarity has 4 different Clinical record forms, Pre-Screening, Clinical Records, Contact Lens Records and Other Exam Records.

i-Clarity allows you to choose what the other exam is known as, depending on its use in your practice you may want to change its name. For example, Non Sight Test or Supplementary Test.

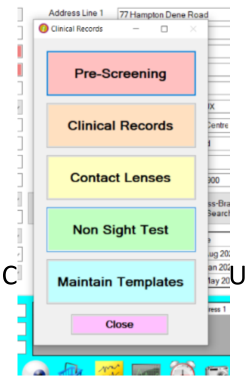
In the maintenance module, navigate to the Misc 6 tab.



Amend the text as applicable in the field labelled ‘Other Exam Known as’



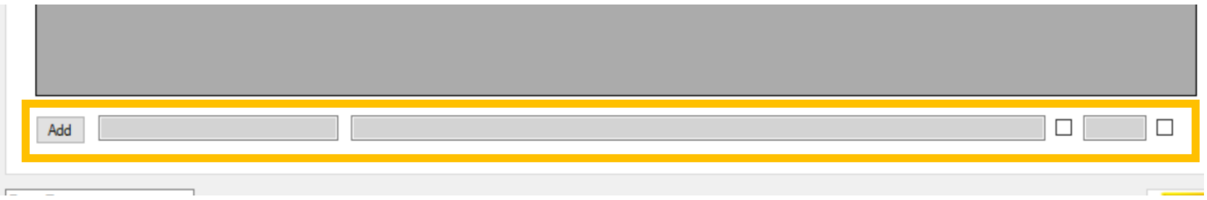
You will now see your chosen name for the other exam form when you open the clinical module.



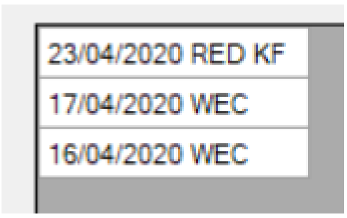
Because the other exam form can be used for several different types of other exam you can add a list of these different types of exams. These types are then made available in other exam section of clinical records.

To add a list of different other exam types, navigate to the ‘Exam Types’ tab in maintenance.

In the ‘exam types’ tab fill in the boxes from left to right as described below:



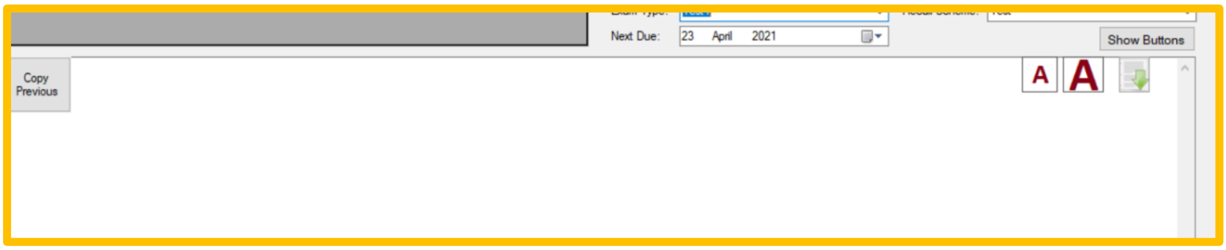
1. Type the name of the exam type, E.g. Emergency, in the first box.
2. Add any notes in the next box.
3. Check the Def checkbox if this appointment type is the default exam type. If this box is checked, when a non-sight test record is opened this exam type will automatically be selected. Only one exam type can be marked as the default.
4. Type abbreviation if the exam type in the next box. When you complete a non-sight test exam you will see a list of dates in clinical records to show exam history with the abbreviation show next to the date.



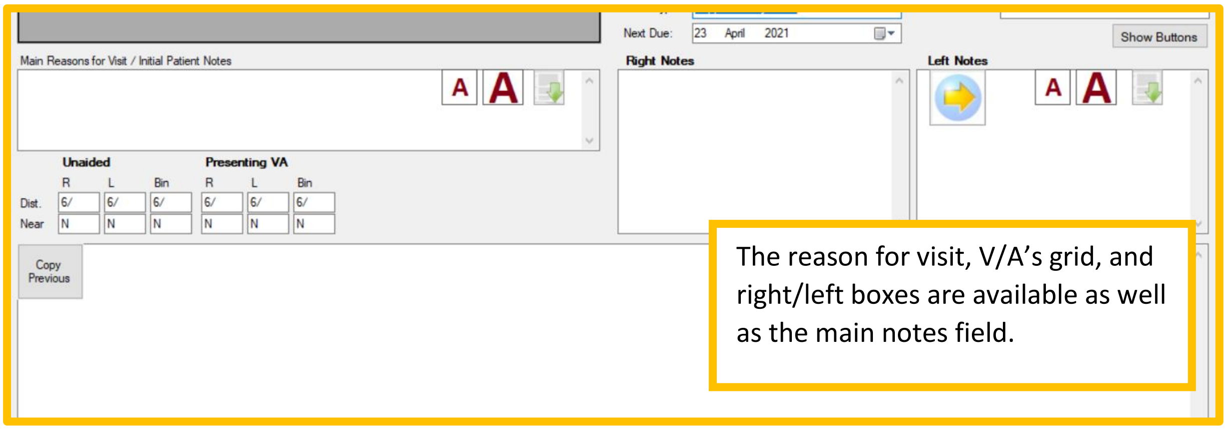
In the non-sight test area of the clinical module, you can easily see what each of the exams was by looking at the abbreviations.

5. Tick the next checkbox if you want to enhance the record of these exam types by including reason for visit, and right and left notes.

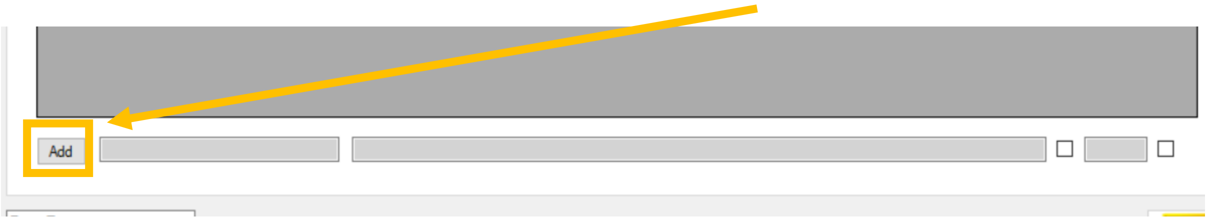
If the box is unticked, when you open select this type of exam you will have a notes field:



If you check this box, when you select this exam type the record will show an available space for reason for visit notes, V/As and separate boxes for right eye and left eye notes.



6. Once you have completed all your selections click the 'Add' button.

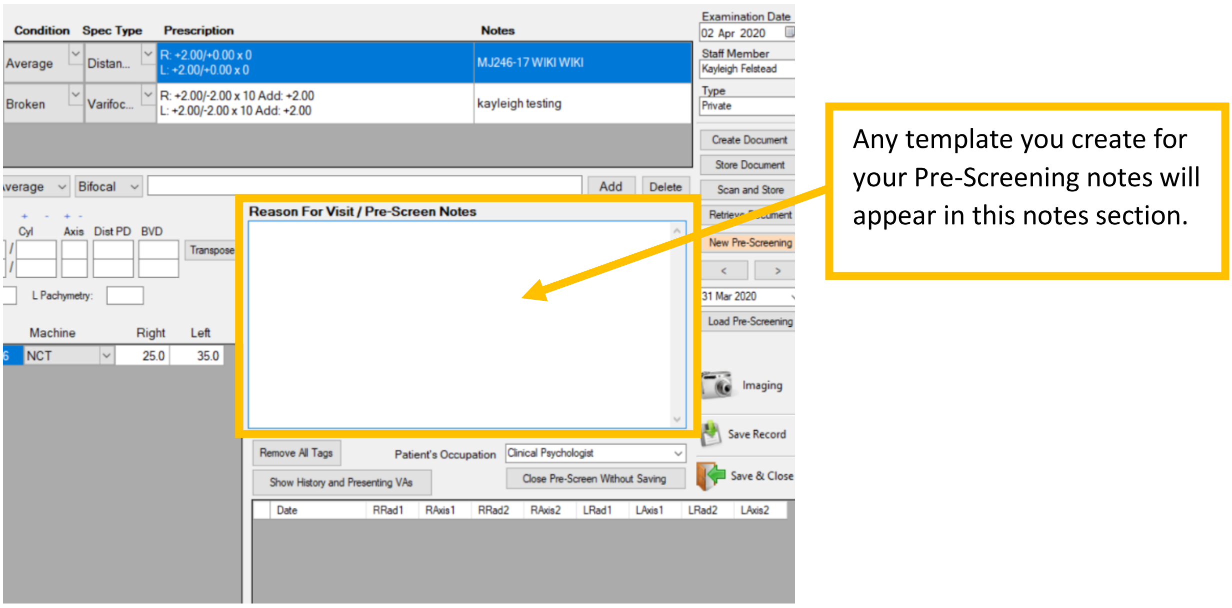


Clinical Record Tags and Templates

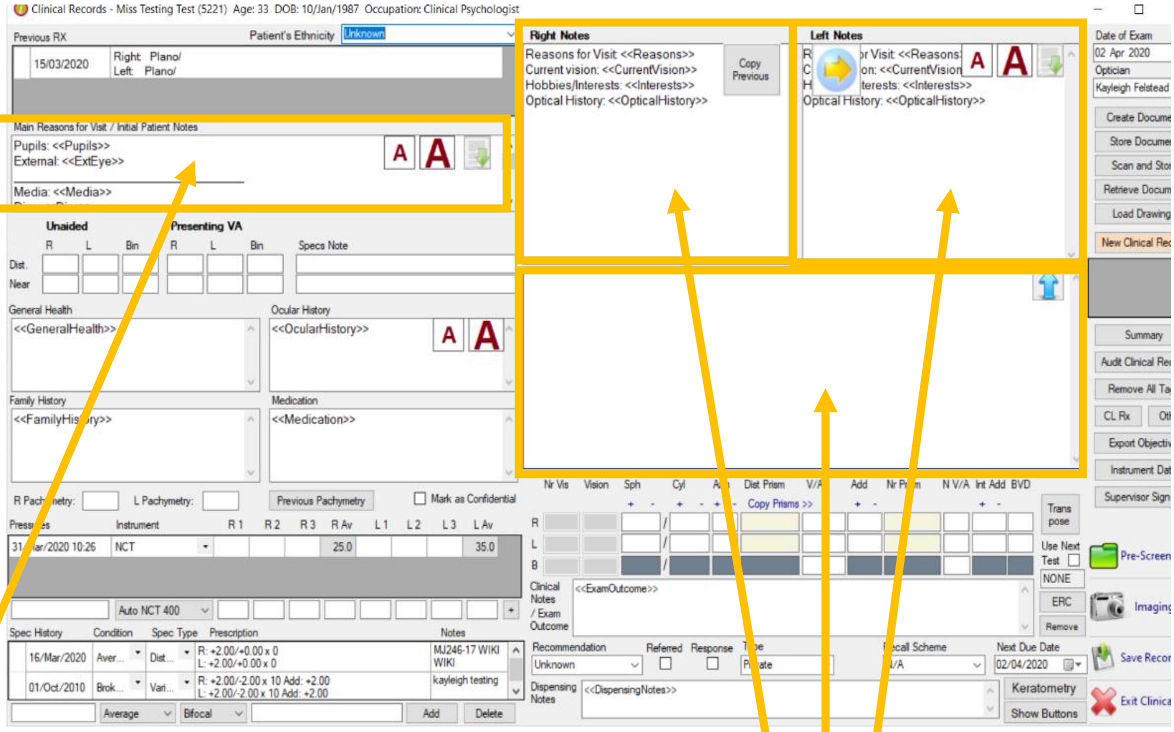
You can create a clinical record template for each of the 4 clinical forms in i-Clarity. You can create as many templates as you need for each section, E.g. you may require a U16 template for your reason for visit section as well as an adult reason for visit template. Similarly, you can create a template for MECS/PEARS in the non-eye exam record as well as a template for a dry eye assessment etc.

The area/s that can be populated with a template in each of the different clinical records forms is shown below.

Pre screen



<u>Eye Exam</u>

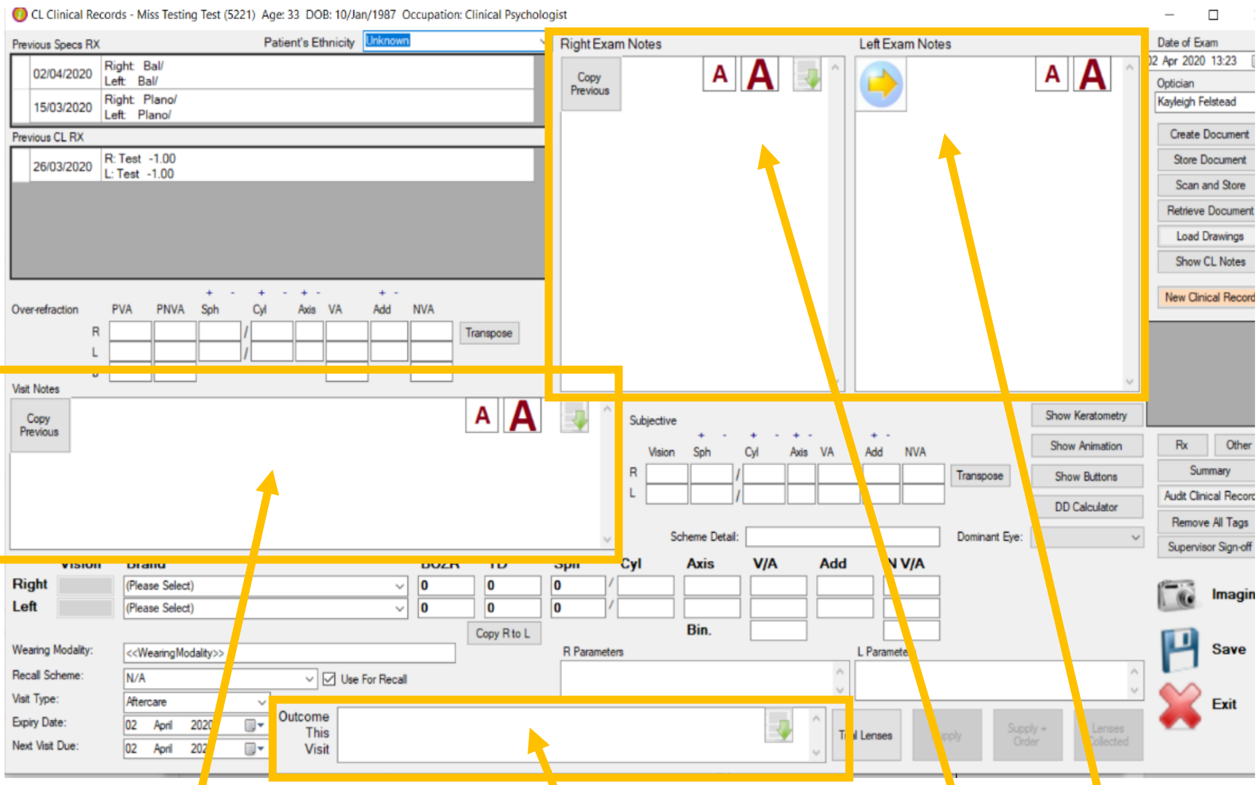


Any template you create for your Reason for visit notes will appear in this notes section.

i-Clarity has a feature which allows you to pull through pre-screening notes into the main clinical record. Therefore, depending on you practice process you may not need to need to create a separate template for this section. Some practices create a combined template. Part of the template is completed in pre-screening, then after the pre-screening notes are pulled into the main clinical record the remaining part of the template is completed by the optometrist.

Any templates you create for your main examination will appear in the Right notes, left notes, and binocular notes field.

Contact Lens Records

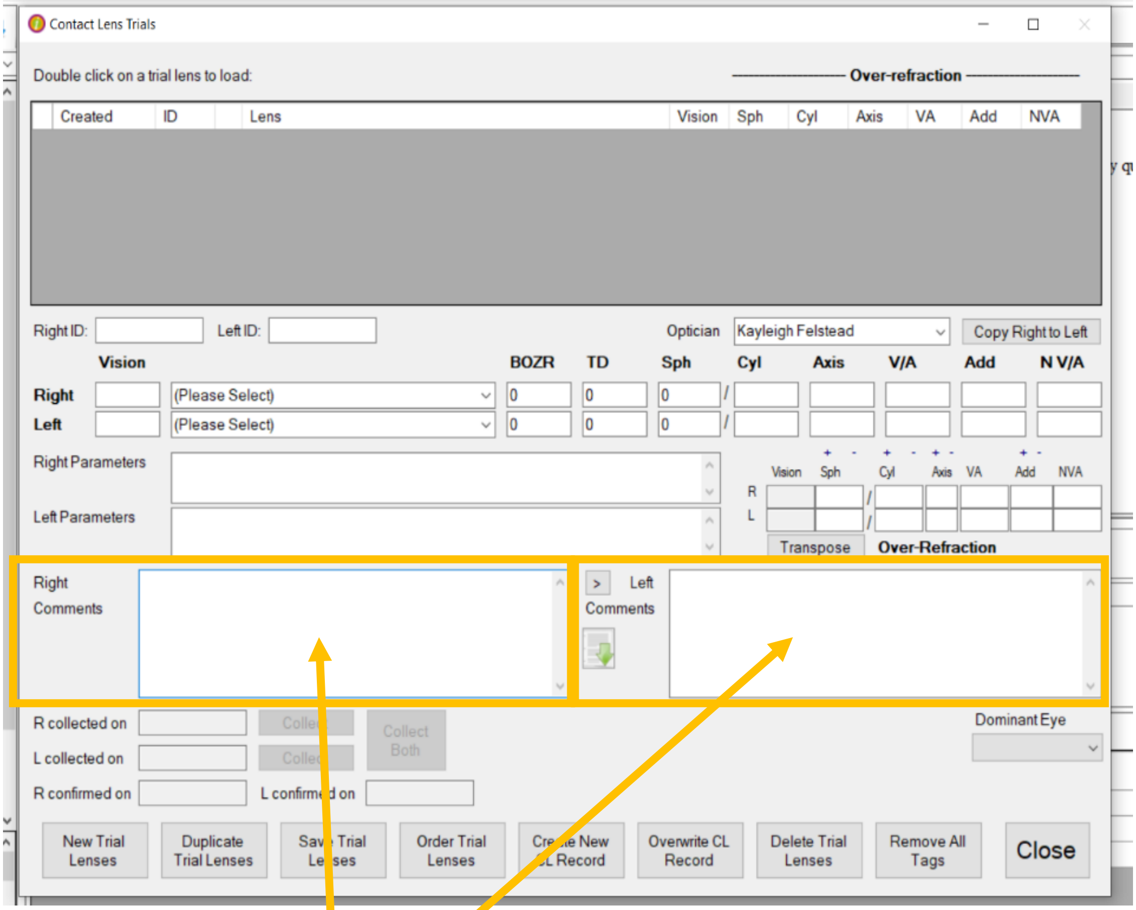


Any template you create for your initial cl visit notes (details of current lens fit and comfort etc.) will appear in this notes section.

Any template you create for your outcome will appear in this notes section.

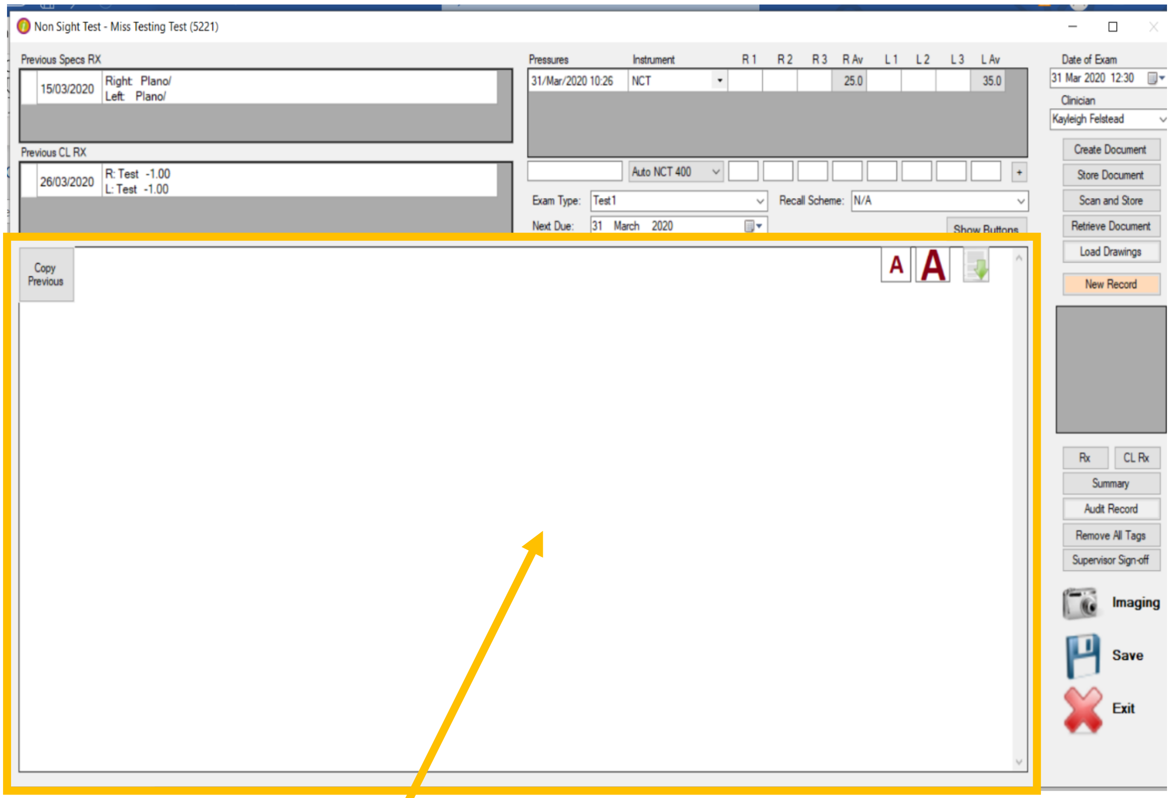
Any template you create for your main contact lens exam will appear in the right and left notes section.

Contact Lens Trials



Any template you create for notes on contact lens fit of trial lenses will appear in this right and left notes section.

<u>Non sight test</u>



Any templates you create for your other exams will appear in this section

Clinical Record Templates

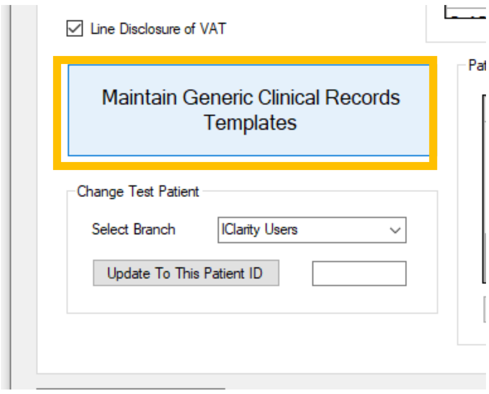
Templates come in two forms, either *Generic* – that is, they are usable by all members of the practice, or *Individual* – they are specific to the currently logged in user.

Templates are made up of a serious of clinical questions followed by a : the space after this colon can be either left blank to allow free typing or can contain a *tag.* In the clinical record form clicking on this *tag* will cause a list of possible answers to that clinical question to appear. Selection of one or several of these answers will cause the tag to disappear from the clinical record and the selected answers to appear in its place.

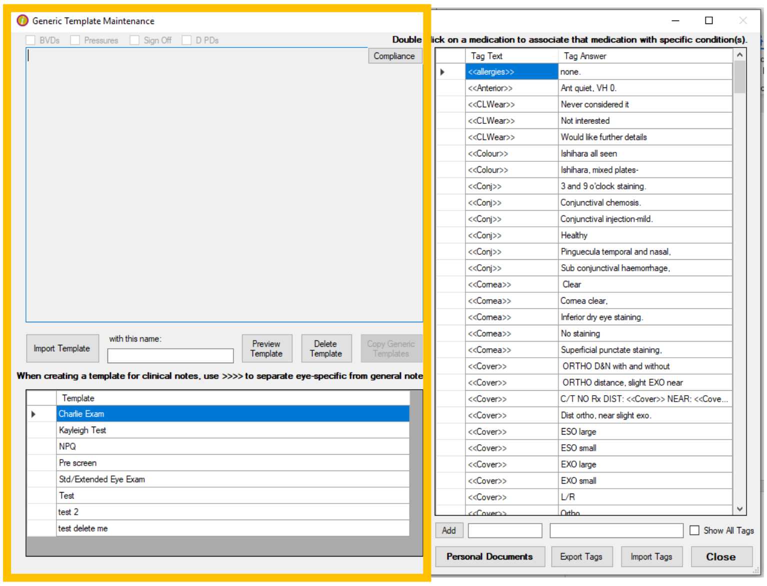
Generic Clinical Record Templates

In the maintenance module of i-Clarity navigate to the Misc 4 tab.

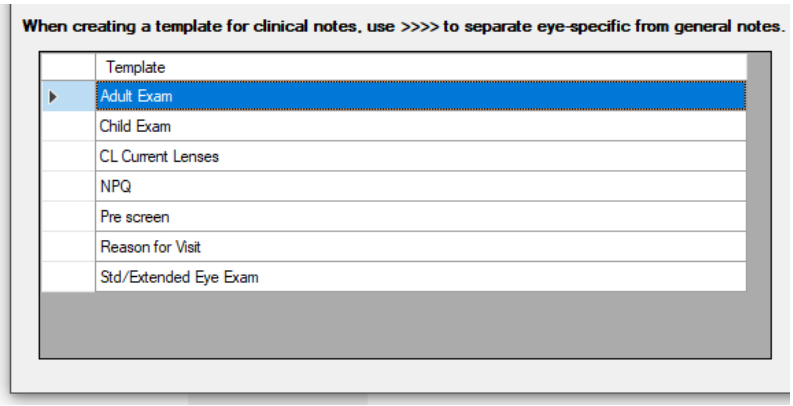
Click on the button 'Maintain Generic Clinical Records Templates'



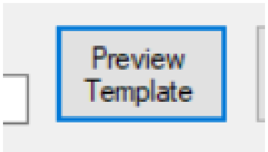
On the left-hand side of the new screen that has opened you can create a template.



1. Highlight the template you want to edit by clicking on it once.

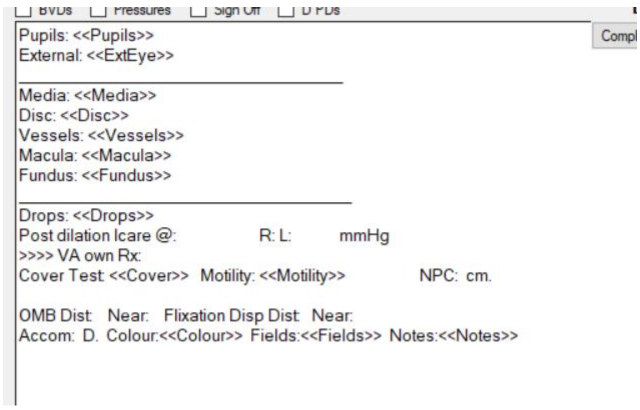


2. Click on preview template.

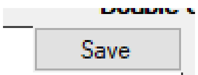


If you would like to create a brand-new template then highlight and preview any existing template or the existing template with similar content to your new template.

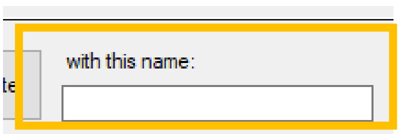
3. Write out the clinical questions/prompt you would like in this section of the clinical record. Ensure you follow each prompt with a : and where you would like a list of answers for this question to show, type your tag text. Tags should be encapsulated in two chevrons e.g. <<Macula>>.



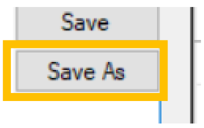
4. If you are only amending an existing template then once complete click the 'Save' button.



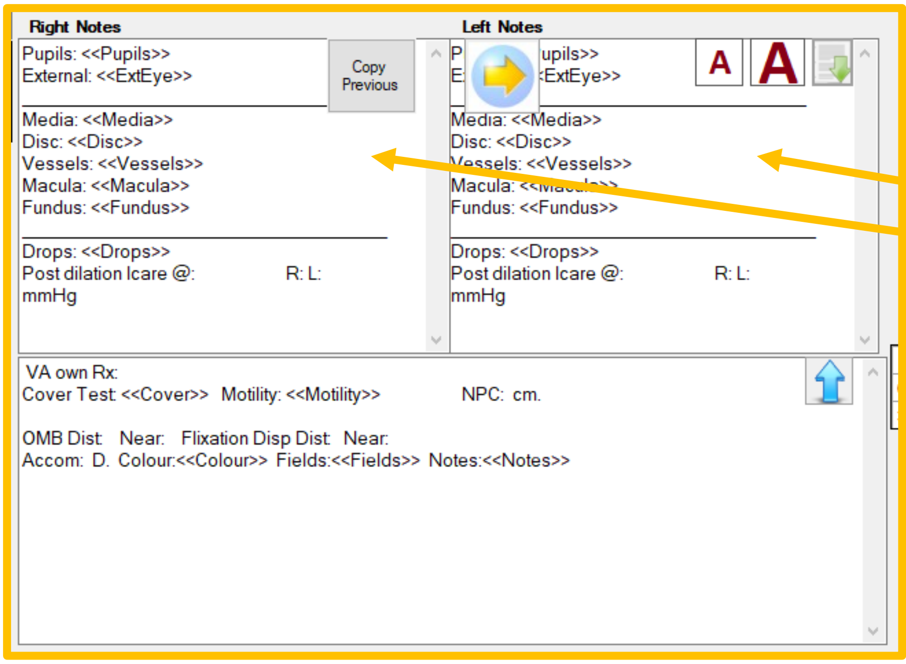
If you are creating a new template firstly, type the name of your new template in the "with this name" box.



Then click on the 'Save As' button.

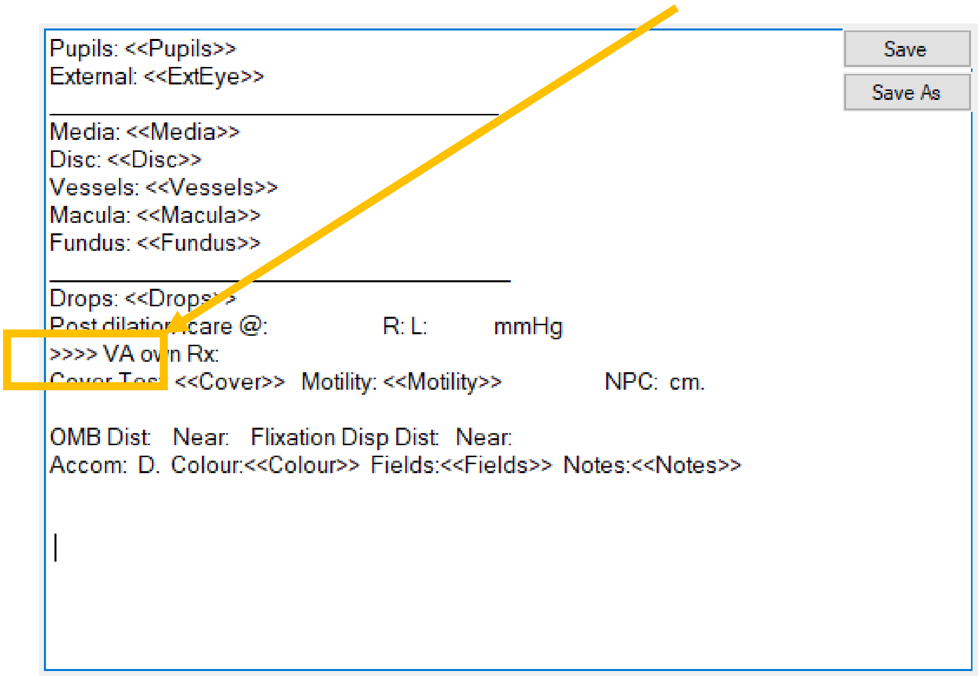


In the main clinical record form a single template is used to populate the right eye, left eye and binocular exam notes sections.



The prompts in the template of the right notes are identical to the prompts in the left notes section

To achieve this the template must contain 4 greater than chevrons in a row.



Any text before these four chevrons will populate both the right and left notes boxes whereas any text after the chevrons will populate the binocular notes section.

Templates can also be imported into i-Clarity from a notepad document. Open notepad on your computer.

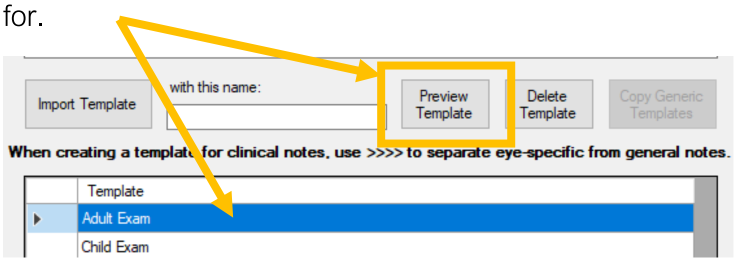
Type your template into notepad and save as a document on your computer. Return to i-Clarity, in the maintain generic clinical records section type a name for your template into the 'with this name field' and then click import template. This will open a navigation window that will allow you to navigate to your saved notepad template. Once selected click open.

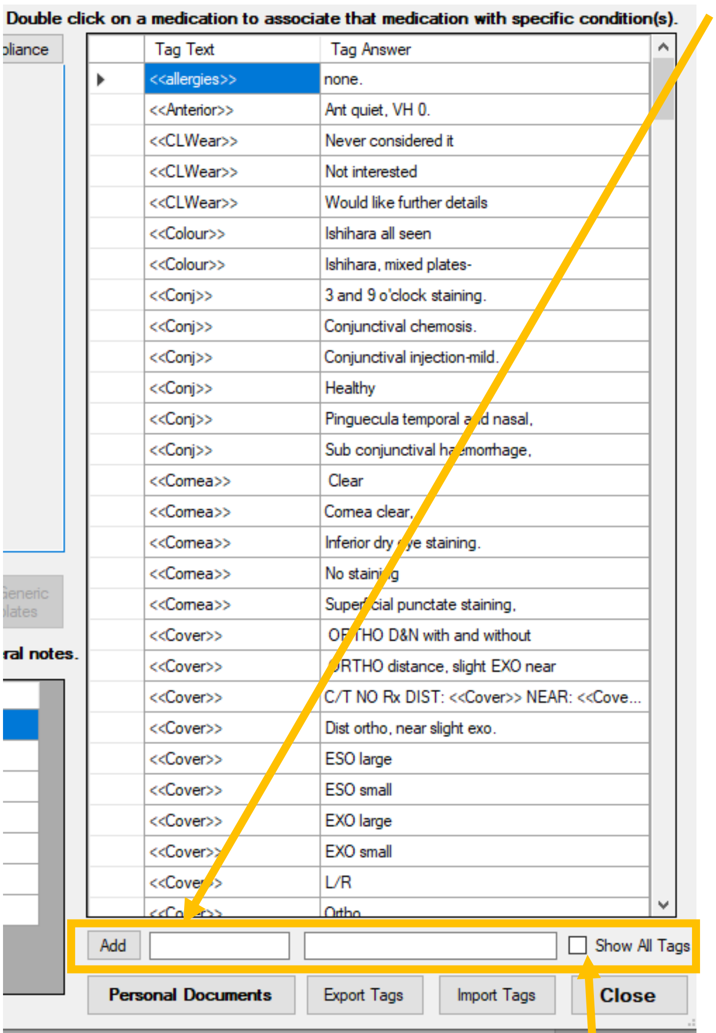
Adding Tags

If the clinical record templates within your i-Clarity have tags included (a word encapsulated in chevrons) then you need to create a list of answers to link with this tag.

Tag answers for generic clinical record templates are added and edited on the right hand side of the window that opens from the ‘Maintain Generic Clinical Records Templates’ button in the Misc 4 tab of maintenance.

Single click on the template that contains the tag/tags you would like to create a list of answers for.





1. Copy the tag from the template (word encapsulated by chevrons) into the field under the tag text column

2. In the next box enter one of the possible options you would like to appear when this tag is clicked in clinical records

3. Then click add

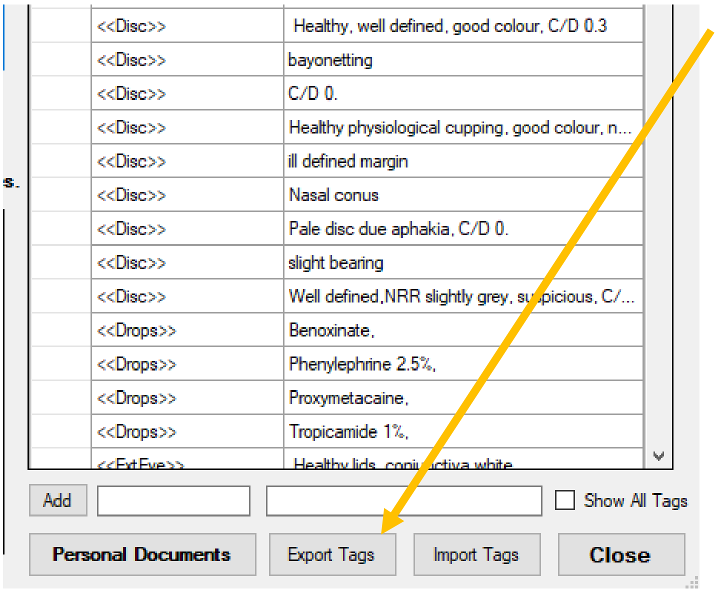
4. You can now repeat this process with the same tag, until all the desired options are in the list.

5. When adding medications, you double click on a medication and a list of common conditions will appear. You can tick the checkboxes next to the conditions that this medication treats. When in clinical records you will be able to find medication by condition. E.g. If someone sufferers from headaches you can bring up a list of medications that read headaches.

Repeat this for all tags in the template and then for tags in all other templates. If a tag appears in two templates, then it will appear when you preview the other template.

To view a list of all tags regardless of template tick the ‘shoe all tags’ box

Tags can also be added to i-Clarity using an excel spreadsheet.



1. Click the ‘Export Tags’ button.

2. This will open a new window which allows you to name and save the excel document to your computer.

3. Once saved open the excel document

You can use the spreadsheet to add new tags and answers. Amend existing answers and remove answers

All tags with in the system will be listed on the excel document in alphabetical order of the tag text column.

A	
TagText	**AnswerText**
<<Symptoms>>	watery eyes
<<Vessels>>	Healthy AV Ratio: 2/3
<<Vessels>>	AV Changes with nipping, grade 0.
<<Vessels>>	Slight AV Changes
<<Vessels>>	Tortuous, AV Ratio:
<<Vision>>	Distance and near getting worse
<<Vision>>	Distance blurred, near ok.
<<Vision>>	Happy distance and near
<<Vision>>	Reading worse without Rx, distance ok.
<<Vitreous>>	Clear,
<<Vitreous>>	Dense vitreous changes
<<Vitreous>>	Fine wispy opacities,
<<Vitreous>>	PVD -
<<Vitreous>>	slight vitreous opacities,
<<When>>	Full time 7/7
<<When>>	Part time
<<When>>	School
<<When>>	Socially and sport
<<When>>	Very occasionally
<<yesno>>	All day
<<yesno>>	no
<<yesno>>	occasionally
<<yesno>>	yes

To amend a tag answer, amend the text in the relevant field of the ‘answer text column’

To remove a tag answer from the system, delete the entire row from the excel document

To add a new tag either type in the tag and tag answer in the empty fields below the current list, or if you are increasing the list of answers for a current tag you can insert blanks rows below the existing tag answers and input the new tag answers

Both the tag text field and answer tag field must be complete for each answer added

Once you have made all the required changes save and close the excel document.

Return to i-Clarity and click the ‘Import Tags’ button to import the spreadsheet and update the tag information in i-Clarity.

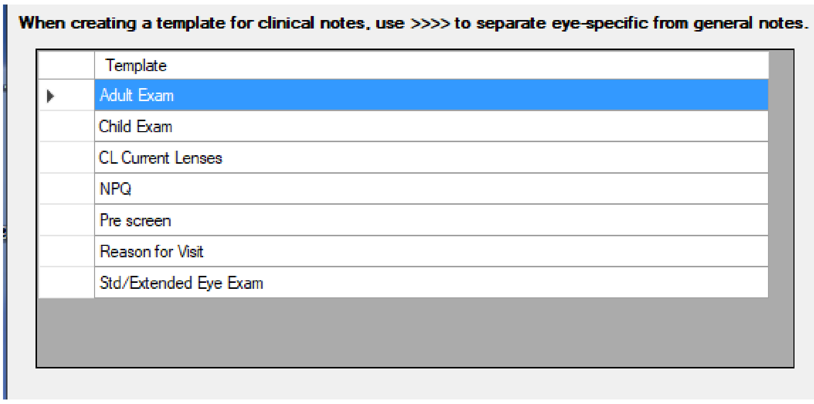
Clinical Record Compliance

Clinical record compliance is a feature that allows you to mark certain sections of the clinical record and the template as required for completion. If they are not completed, then a warning message will appear when the user goes to finalise the clinical record. Clinical record compliance will also be shown on the ‘Clinic Outcomes Report’.

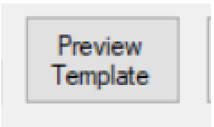
The compliance requirements for the clinical record can alter depending on which template is used.

Compliance options therefore need to be set against each applicable template.

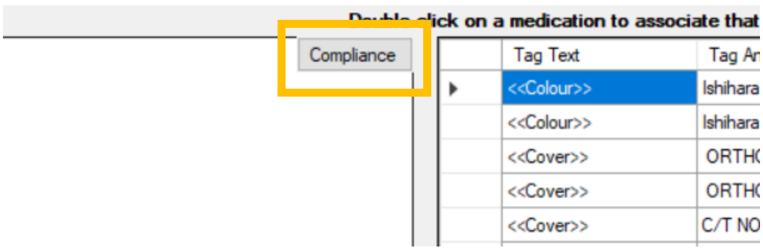
1. Highlight the template you would like to set compliance options against.



2. Click on “Preview template”

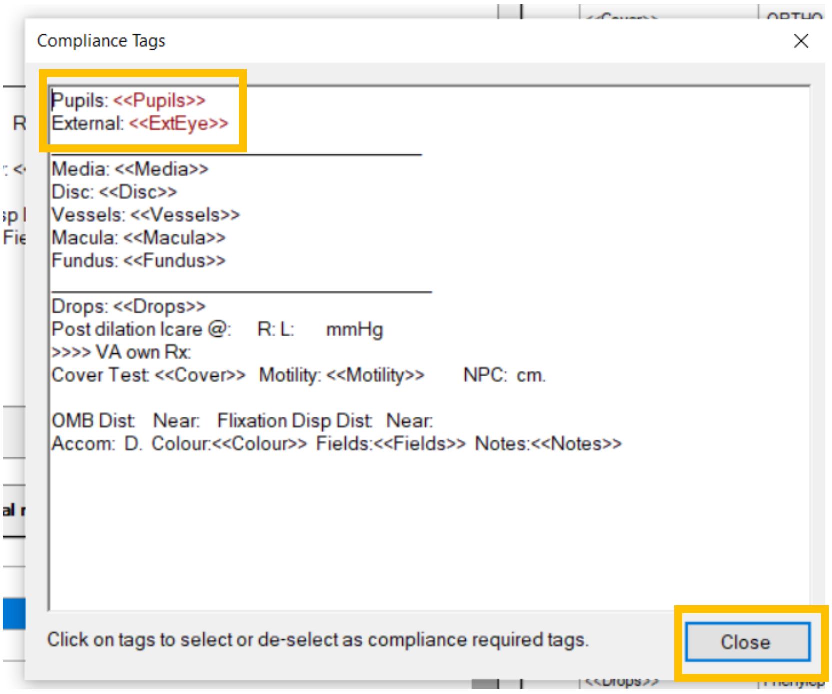


3. Click on “Compliance” in the top right-hand corner of the template.

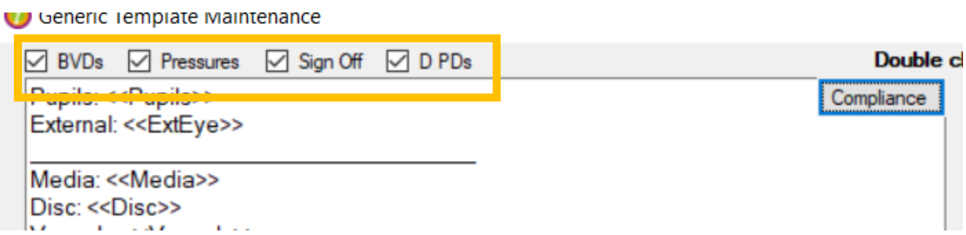


This will open a new window with your template details.

4. Click once on to the tag name to make it compliant. Click it again to remove compliance. When a tag is compliant it changes colour to purple. Once all your compliant tags have been selected, click close.



5. If you would like to make BVD's, Pressures, Sign-off and D PD's to be compliant areas when this template is used you can tick the check boxes at the top of the template.

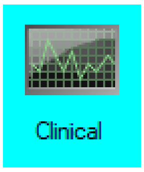


Personal clinical record templates

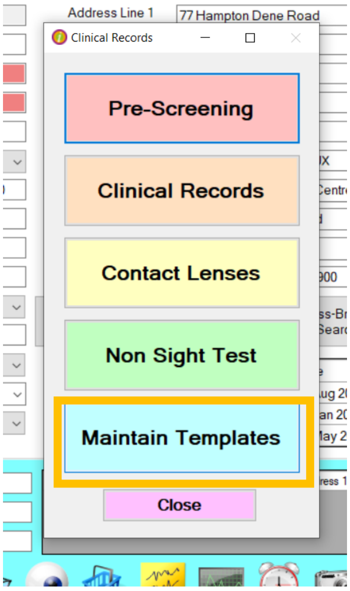
If it is not appropriate for all Clinicians to use the same (generic) template, then individual users can create their own personal templates. Personal templates will only be available when that user is logged in.

To create yourself a personal template:

1. Click on the clinical module icon

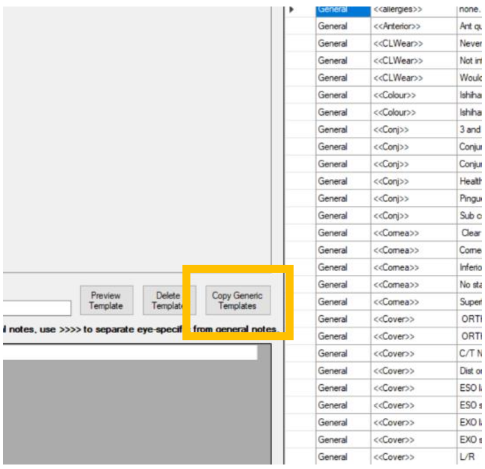


2. Click on Maintain Templates



This will open a personal template maintenance form with the same layout and features as described in the generic clinical record templates section.

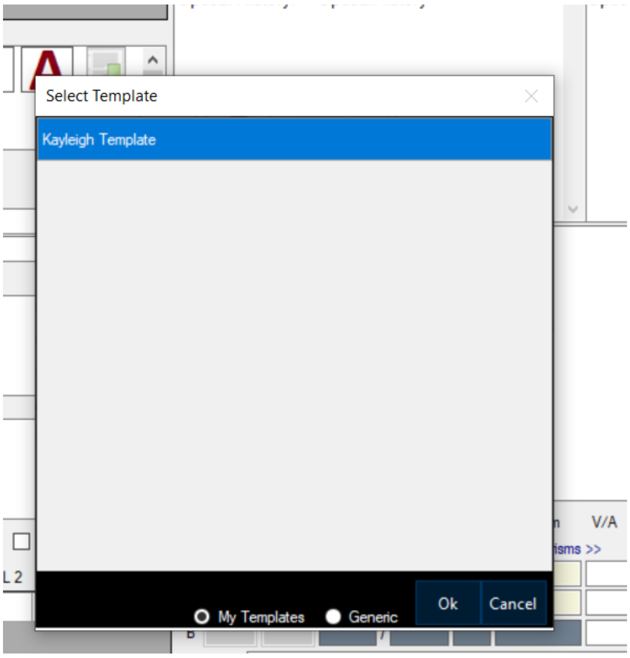
3. If you would like to edit the generic templates rather than starting a new template from scratch, click on the Copy Generic Templates button.



This will copy the generic templates into your own profile. You can edit these templates and save them as new ones by following the steps in the generic clinical record template section on page 10.

Any generic templates that you do not need in your personal profile can be deleted by highlighting them with a single click and then clicking on the 'delete template' button. This will delete the template from your profile, but the template will still be available in the generic template page.

The templates you have saved in your profile will now show up in the "My templates" section of select template window with clinical records.



Setting default Clinical Record Templates

Personal templates and generic templates will be available for clinicians to select from within the clinical module when they are completing a record for a patient.

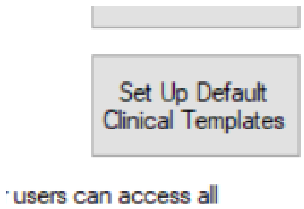
However, you can select your most used template to be a default template. This means that new clinical records will be automatically populated with this template and manual template selection will only need to happen if a different template is required.

To set a default template for a user open the maintenance module of i-Clarity.

1. Navigate to the users tab.

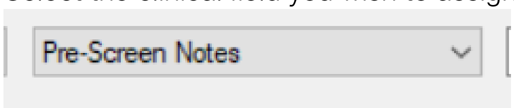
2. Click on the user you would like to assign a default template. (The arrow shows which user you are currently editing.)

3. Click on the set up clinical default templates button on the right-hand side.

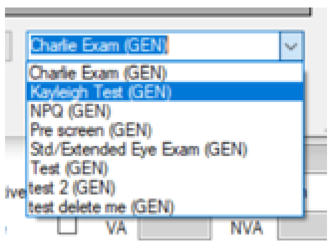


This will open a new window.

4. Select the clinical field you wish to assign the template to from the dropdown list.



5. Select the template you would like to assign from the dropdown list. Any personalised template that user has made will show up with (PER) next to it.



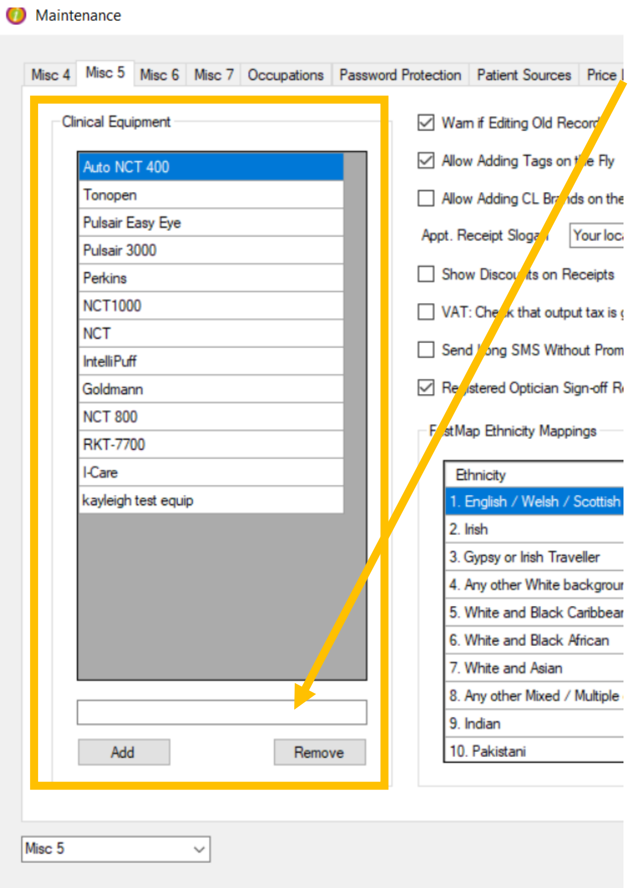
6. Click add

Once templates have been assigned, when that user opens a clinical record the tag names will load up straight away without the need to go into the list and choose one.

Clinical Equipment

When adding pressures to a clinical record there is a drop down to select the equipment name.

To add a piece of equipment to this list navigate to the Misc 5 tab in maintenance



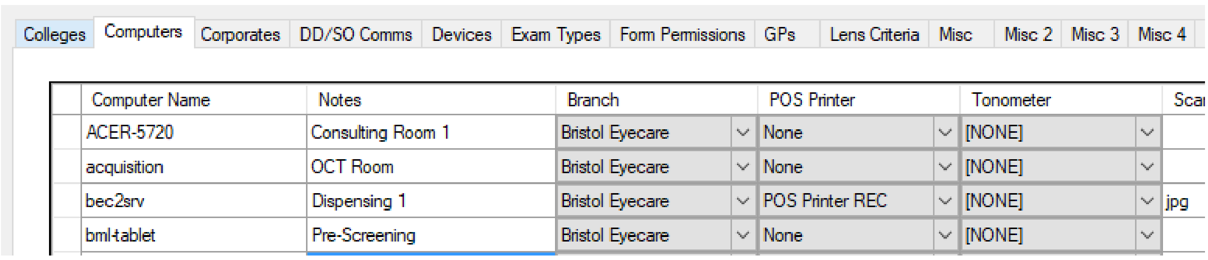
1. Type the name of the equipment into the text box.

2. Click add.

To remove an item of equipment from the list, click to highlight, then click the 'remove' button.

To prevent continuous selection of equipment from the list when adding IOP's you can apply a default selection. This equipment default is based on the consulting rooms most used piece of equipment.

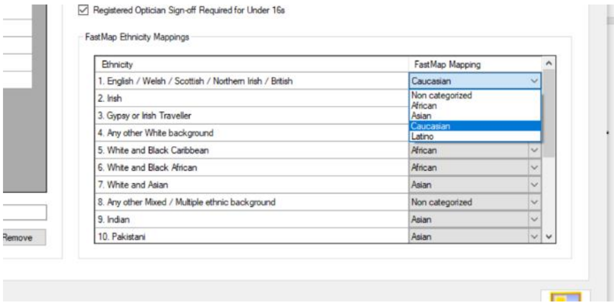
To set an equipment default for a consulting room/location, navigate to the computers tab in the maintenance module of i-Clarity.



Then for the computer located in that consulting room etc select from the drop down under the heading Tonometer, the equipment you would like to set as a default.

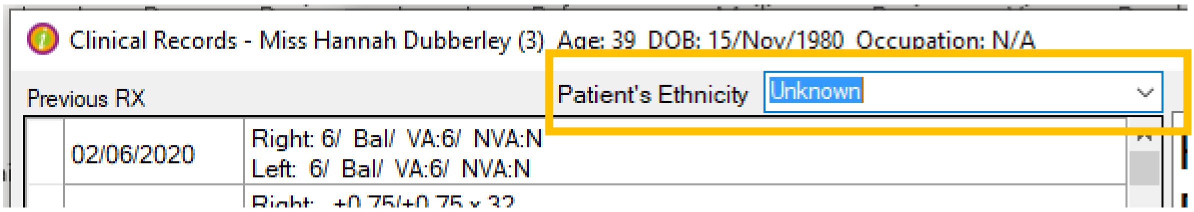
Mapping NHS ethnicities to OCT software

You will find an extensive list of NHS ethnicities mapped to Topcon OCT and ibase ethnicity categories, and these can be edited in the Misc. 5 tab of maintenance.



Select the fast map mapping category from the dropdown list next to the relevant ethnicity.

The ethnicity can be selected from a dropdown list in the clinical records.



if you have your OCT machine connected to i-Clarity, then the mapping ethnicity will automatically be selected when the patient record opens within the OCT software.

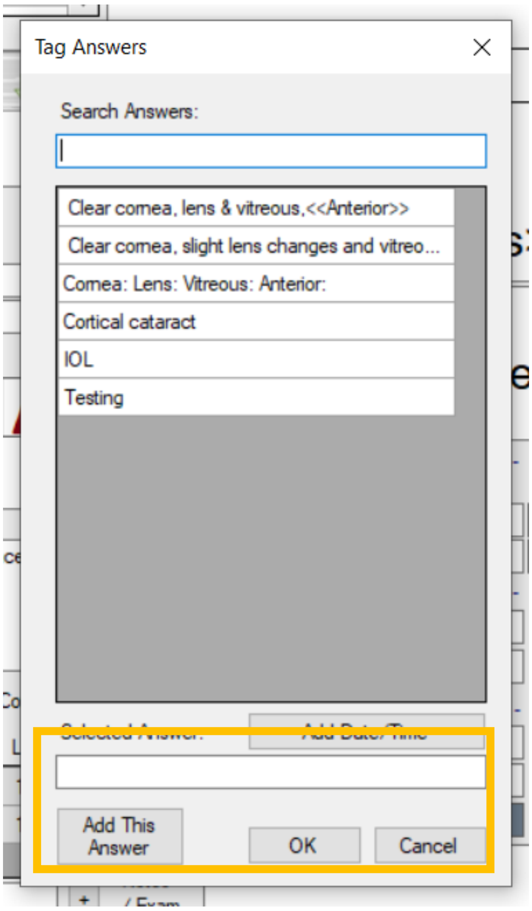
Additional clinical configuration options

Edit record warning

In the Misc. 5 tab, there is a checkbox called “Warn if Editing Old Record”. If you check this box, when you try to edit an old record, you will receive a warning message. If you leave this unticked, you will not receive a warning when you edit an existing record.

Allow adding tags on the fly

On the Misc. 5 tab, there is a checkbox called “Allow Adding Tags on the Fly”. When this box is ticked, clinical record users can add tag answers to their personal list from within the clinical record form:



When the list of tag answers comes up, the clinician can add an alternative answers in the free text box at the bottom and click “Add This Answer” and the tag answer will then be available in this tag going forward.

If the box is left unchecked, the clinician cannot add new answers to the list for future use.