



Contents

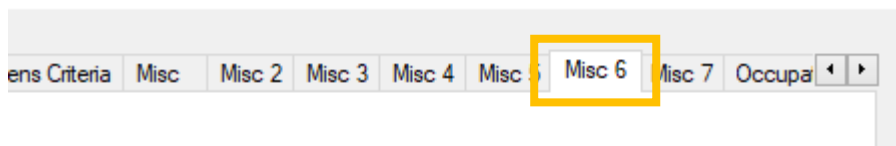
Other Exam Name and Types.....	2
Clinical Record Tags and Templates	5
Clinical Record Templates.....	10
Generic Clinical Record Templates.....	10
Adding Tags.....	13
Clinical Record Compliance.....	15
Personal Clinical Record Templates.....	17
Setting Default Clinical Record Templates.....	19
Clinical Equipment	20
Ethnicity mappings	21
Additional clinical configuration options	22

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.

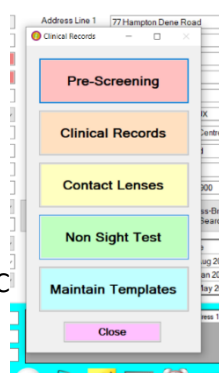
In the maintenance module, navigate to the Misc 6 tab.



Amend the text as applicable in the field labelled 'Other Exam Known as'

A screenshot of the i-Clarity maintenance module's 'Misc 6' tab. The 'Other Exam Known as' field is highlighted with a yellow rectangular box and contains the text 'Non Sight Test'. A yellow arrow points from the text 'Amend the text as applicable in the field labelled 'Other Exam Known as'' to this field. Other fields visible include 'Standard Lens SCU Code for All-in Pricing' (BGC60), 'Print Patient Address on Slip' (checked), 'Show All Staff Initials' (unchecked), 'SMS Exe Path', 'Allow Redemption of Gift Vouchers in Different Branch' (checked), 'Allow Prescriptions Open with Patients (ADVANCED USERS ONLY)' (unchecked), 'Enforce Adjustment Reasons in Dispensing Module' (unchecked), 'Use Global Patient Folder IDs (Each branch will automatically update when a computer is logged into i-Clarity in the branch)' (unchecked), and 'Encrypt Account Numbers (RESTART I-CLARITY ON ALL MACHINES AS SOON AS ENABLING)' (unchecked).

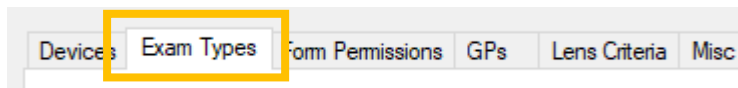
You will now see your chosen name for the other exam form when you open the clinical module.





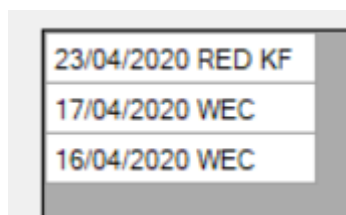
Because the other exam form can be used for several different types of other exam you can add a list of these different types of exams. These types are then made available in other exam section of clinical records.

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.

The reason for visit, V/A's grid, and right/left boxes are available as well as the main notes field.

Unaided			Presenting VA			
	R	L	Bin	R	L	Bin
Dist.	5/	5/	6/	5/	5/	6/
Near	N	N	N	N	N	N

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

The screenshot displays the 'Pre screen' form in i-Clarity. The form is divided into several sections. At the top, there is a table with columns: Condition, Spec Type, Prescription, and Notes. Below this, there are fields for Examination Date, Staff Member, and Type. A yellow box highlights the 'Reason For Visit / Pre-Screen Notes' section, which is a large text area. An arrow points from a text box on the right to this section. The text box contains the text: 'Any template you create for your Pre-Screening notes will appear in this notes section.'

Condition	Spec Type	Prescription	Notes
Average	Distan...	R: +2.00/+0.00 x 0 L: +2.00/+0.00 x 0	MJ246-17 WIKI WIKI
Broken	Varifoc...	R: +2.00/-2.00 x 10 Add: +2.00 L: +2.00/-2.00 x 10 Add: +2.00	kayleigh testing

Examination Date: 02 Apr 2020
Staff Member: Kayleigh Felstead
Type: Private

Reason For Visit / Pre-Screen Notes

Machine: NCT, Right: 25.0, Left: 35.0

Patient's Occupation: Clinical Psychologist

Buttons: Remove All Tags, Show History and Presenting VAs, Close Pre-Screen Without Saving, Save Record, Save & Close

Any template you create for your Pre-Screening notes will appear in this notes section.

Eye Exam

Clinical Records - Miss Testing Test (5221) Age: 33 DOB: 10/Jan/1987 Occupation: Clinical Psychologist

Previous RX: 15/03/2020 Right: Plano/ Left: Plano/ Patient's Ethnicity: Unknown

Main Reasons for Visit / Initial Patient Notes

Pupils: <<Pupils>> External: <<ExtEye>> Media: <<Media>>

Unaided Presenting VA

	R	L	Bin	R	L	Bin	Specs Note
Dist							
Near							

General Health: <<GeneralHealth>> Ocular History: <<OcularHistory>>

Family History: <<FamilyHistory>> Medication: <<Medication>>

R Pachymetry: L Pachymetry: Previous Pachymetry: Mark as Confidential

Preses	Instrument	R1	R2	R3	R Av	L1	L2	L3	L Av
31/Mar/2020 10:26	NCT				25.0				35.0

Spec History: Condition Spec Type Prescription Notes

Spec History	Condition	Spec Type	Prescription	Notes
16/Mar/2020	Aver...	Dist.	R: +2.00/+0.00 x 0 L: +2.00/+0.00 x 0	MJ246-17 WIKI
01/Oct/2010	Brok...	Vari...	R: +2.00/-2.00 x 10 Add: +2.00 L: +2.00/-2.00 x 10 Add: +2.00	kayleigh testing

Average Bifocal Add Delete

Right Notes

Reasons for Visit: <<Reasons>> Current vision: <<CurrentVision>> Hobbies/Interests: <<Interests>> Optical History: <<OpticalHistory>>

Left Notes

Reasons for Visit: <<Reasons>> Current vision: <<CurrentVision>> Hobbies/Interests: <<Interests>> Optical History: <<OpticalHistory>>

Trans pose Use Next Test NONE ERC Remove

Recommendation: Unknown Referred: Response: Type: Plate Clinical Scheme: N/A Next Due Date: 02/04/2020

Dispensing Notes: <<DispensingNotes>> Keratometry Show Buttons Exit Clinica

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 your practice process you may not 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

CL Clinical Records - Miss Testing Test (5221) Age: 33 DOB: 10/Jan/1987 Occupation: Clinical Psychologist

Previous Specs RX

02/04/2020	Right: Bal/
15/03/2020	Left: Bal/
	Right: Plano/
	Left: Plano/

Previous CL RX

26/03/2020	R: Test -1.00
	L: Test -1.00

Overrefraction

	PVA	PNVA	Sph	Cyl	Axis	VA	Add	NVA
R								
L								

Transpose

Visit Notes

Copy Previous

Right Exam Notes

Left Exam Notes

Subjective

	Vision	Sph	Cyl	Axis	VA	Add	NVA
R							
L							

Scheme Detail:

Dominant Eye:

Wearing Modality: <<WearingModality>>

Recall Scheme: N/A

Visit Type: Aftercare

Expiry Date: 02 April 2020

Next Visit Due: 02 April 2020

Outcome This Visit

Copy R to L

R Parameters

L Parameters

Bin.

Copy

Supply + Order

Lenses Collected

Save

Exit

Date of Exam: 02 Apr 2020 13:23

Optician: Kayleigh Felstead

Create Document

Store Document

Scan and Store

Retrieve Document

Load Drawings

Show CL Notes

New Clinical Record

Summary

Audit Clinical Record

Remove All Tags

Supervisor Sign-off

Imaging

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

Double click on a trial lens to load:

Over-refraction

Created	ID	Lens	Vision	Sph	Cyl	Axis	VA	Add	NVA

Right ID: Left ID: Optician:

	Vision	BOZR	TD	Sph	Cyl	Axis	V/A	Add	N V/A
Right	(Please Select)	0	0	0					
Left	(Please Select)	0	0	0					

Right Parameters:

Left Parameters:

	Vision	Sph	Cyl	Axis	VA	Add	NVA
R							
L							

Over-Refracton

Right Comments:

Left Comments:

R collected on:

L collected on:

R confirmed on: L confirmed on:

Dominant Eye:

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

Non sight test

Non Sight Test - Miss Testing Test (5221)

Previous Specs RX
15/03/2020 Right: Plano/
Left: Plano/

Previous CL RX
26/03/2020 R: Test -1.00
L: Test -1.00

Pressures
31/Mar/2020 10:26 NCT

Instrument
Auto NCT 400

Exam Type: Test 1 Recall Scheme: N/A

Next Due: 31 March 2020

Date of Exam
31 Mar 2020 12:30

Clinician
Kayleigh Felstead

Create Document
Store Document
Scan and Store
Retrieve Document
Load Drawings
New Record

Rx CL Rx
Summary
Audit Record
Remove All Tags
Supervisor Sign-off
Imaging
Save
Exit

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

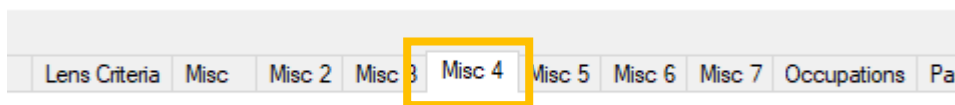
Clinical Record Templates

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.

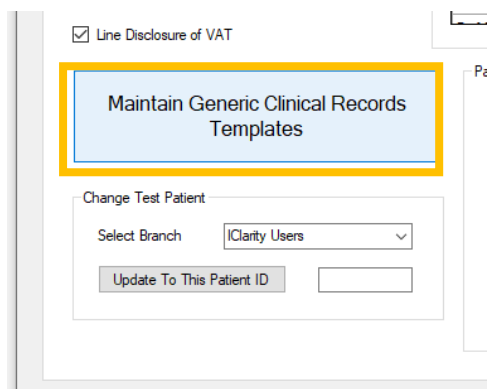
Templates are made up of a series of clinical questions followed by a : the space after this colon can be either left blank to allow free typing or can contain a *tag*. In the clinical record form clicking on this *tag* will cause a list of possible answers to that clinical question to appear. Selection 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

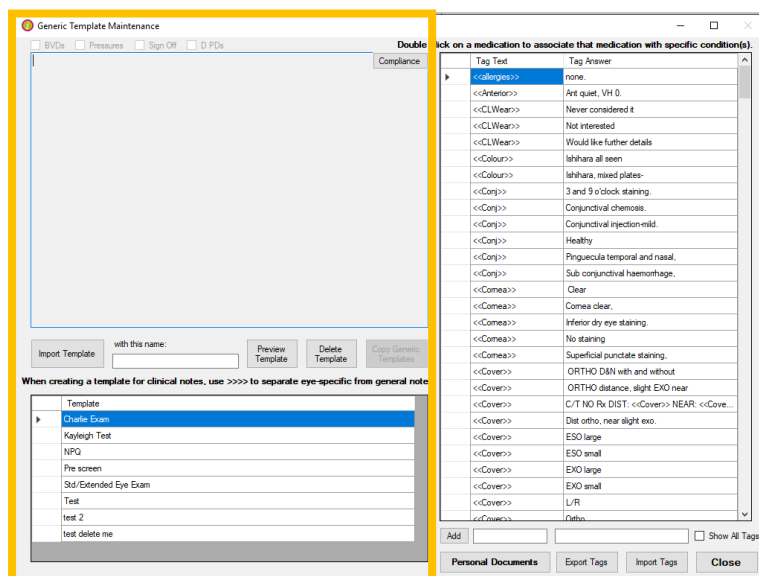
In the maintenance module of i-Clarity navigate to the Misc 4 tab.



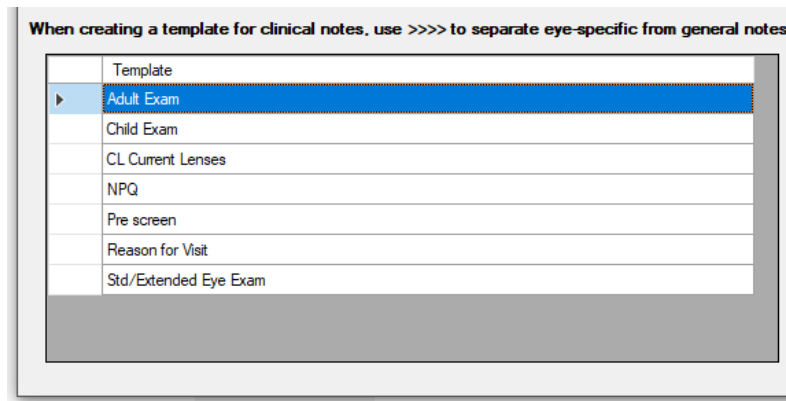
Click on the button 'Maintain Generic Clinical Records Templates'



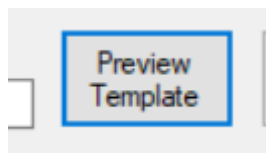
On the left-hand side of the new screen that has opened you can create a template.



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



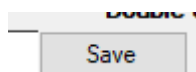
2. Click on preview template.



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.

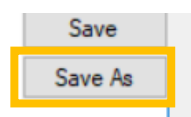
3. Write out the clinical questions/prompt you would like in this section of the clinical record. Ensure you follow each prompt with a : and where you would like a list of answers for this question to show, type your tag text. Tags should be encapsulated in two chevrons e.g. <<Macula>>.

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.

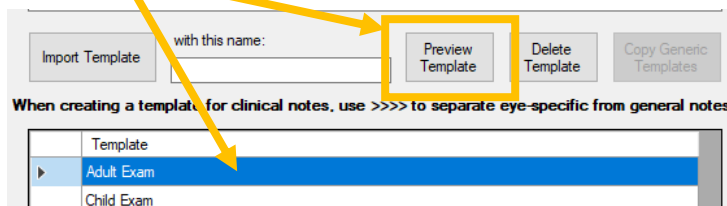
Type your template into notepad and save as a document on your computer. Return to i-Clarity, in the maintain generic clinical records section type a name for your template into the 'with this name field' and then click import template. This will open a navigation window that will allow you to navigate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

Adding Tags

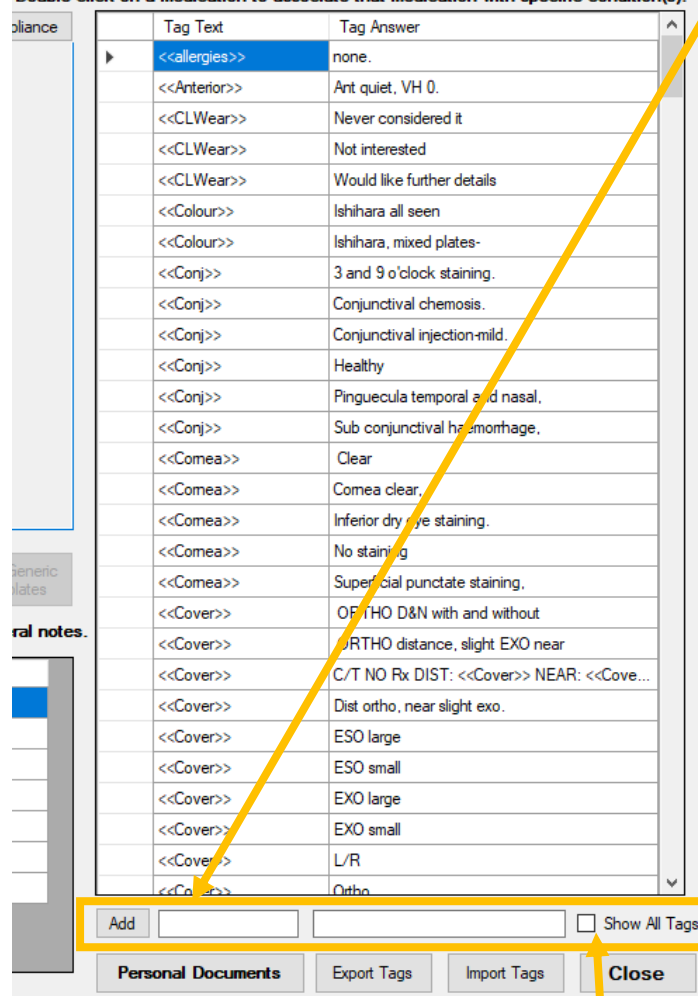
If the clinical record templates within your i-Clarity have tags included (a word encapsulated in chevrons) then you need to create a list of answers to link with this tag.

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.



Double click on a medication to associate that medication with specific condition(s).



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 suffers 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 'show all tags' box

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

<<Disc>>	Healthy, well defined, good colour, C/D 0.3
<<Disc>>	bayonetting
<<Disc>>	C/D 0.
<<Disc>>	Healthy physiological cupping, good colour, n...
<<Disc>>	ill defined margin
<<Disc>>	Nasal conus
<<Disc>>	Pale disc due aphakia, C/D 0.
<<Disc>>	slight bearing
<<Disc>>	Well defined, NRR slightly grey, suspicious, C/...
<<Drops>>	Benoxinate,
<<Drops>>	Phenylephrine 2.5%,
<<Drops>>	Proxymetacaine,
<<Drops>>	Tropicamide 1%,
<<ExtEve>>	Healthy lids, conjunctiva white

Add ☐ Show All Tags

Personal Documents Export Tags Import Tags Close

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
i4	<<Symptoms>>	watery eyes
i5	<<Vessels>>	Healthy AV Ratio: 2/3
i6	<<Vessels>>	AV Changes with nipping, grade 0.
i7	<<Vessels>>	Slight AV Changes
i8	<<Vessels>>	Tortuous, AV Ratio:
i9	<<Vision>>	Distance and near getting worse
i0	<<Vision>>	Distance blurred, near ok.
i1	<<Vision>>	Happy distance and near
i2	<<Vision>>	Reading worse without Rx, distance ok.
i3	<<Vitreous>>	Clear,
i4	<<Vitreous>>	Dense vitreous changes
i5	<<Vitreous>>	Fine wispy opacities,
i6	<<Vitreous>>	PVD -
i7	<<Vitreous>>	slight vitreous opacities,
i8	<<When>>	Full time 7/7
i9	<<When>>	Part time
i0	<<When>>	School
i1	<<When>>	Socially and sport
i2	<<When>>	Very occasionally
i3	<<yesno>>	All day
i4	<<yesno>>	no
i5	<<yesno>>	occasionally
i6	<<yesno>>	yes
i7		

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 blank 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.

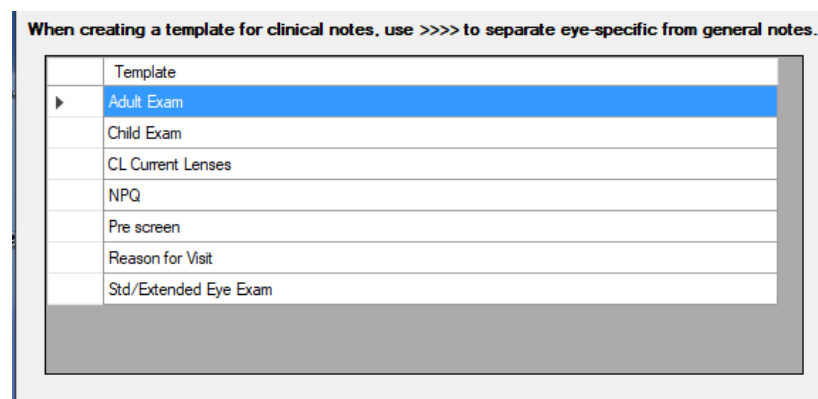
Clinical Record Compliance

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'.

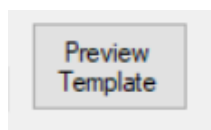
The compliance requirements for the clinical record can alter depending on which template is used.

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

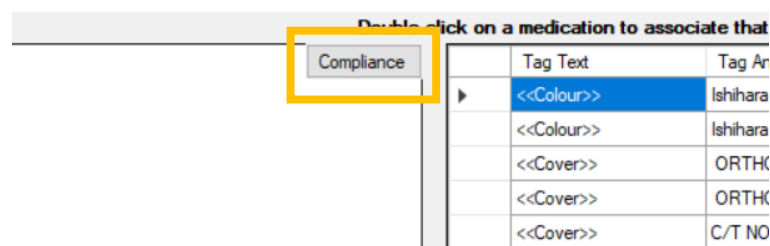
1. Highlight the template you would like to set compliance options against.



2. Click on "Preview template"

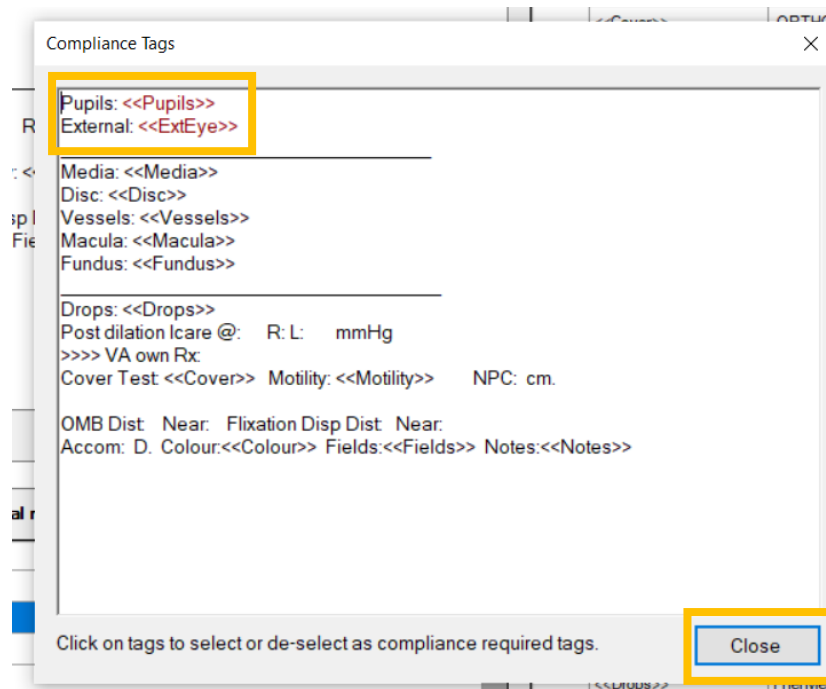


3. Click on "Compliance" in the top right-hand corner of the template.

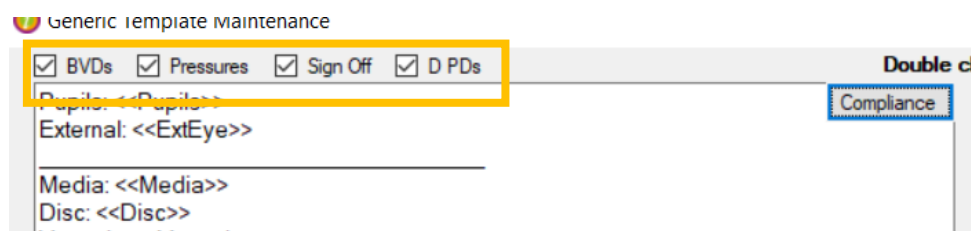


This will open a new window with your template details.

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.

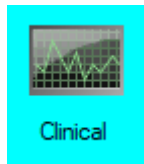


Personal clinical record templates

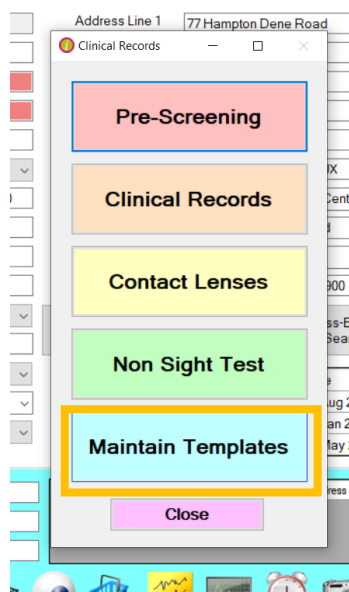
If it is not appropriate for all Clinicians to use the same (generic) template, then individual users can create their own personal templates. Personal templates will only be available when that user is logged in.

To create yourself a personal template:

1. Click on the clinical module icon

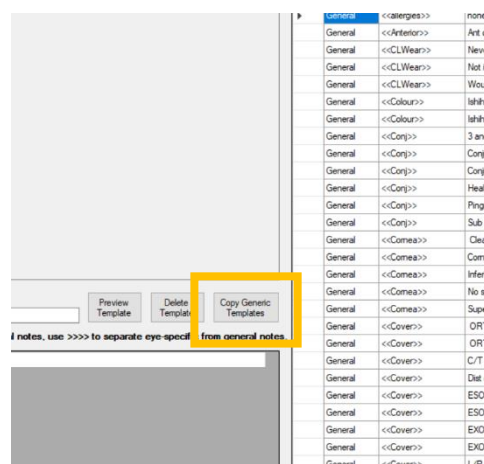


2. Click on Maintain Templates



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

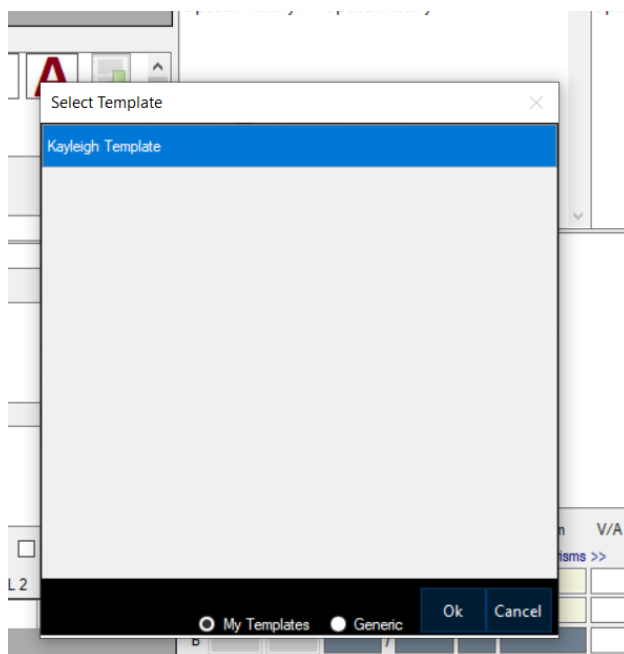
3. If you would like to edit the generic templates rather than starting a new template from scratch, click on the Copy Generic Templates button.



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.



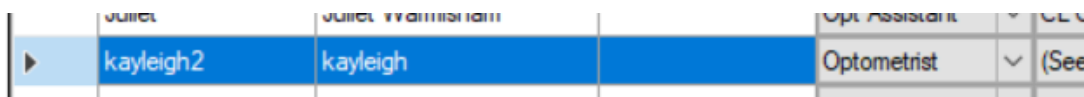
Setting default Clinical Record Templates

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.

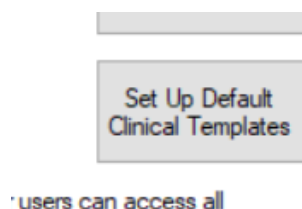
However, you can select your most used template to be a default template. This means that new clinical records will be automatically populated with this template and manual template selection will only need to happen if a different template is required.

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.)

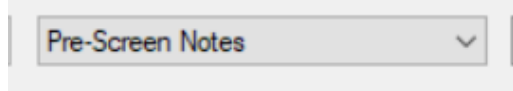


3. Click on the set up clinical default templates button on the right-hand side.

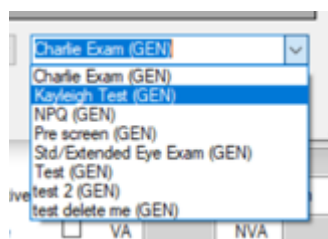


This will open a new window.

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

Maintenance

The screenshot shows the 'Maintenance' window with the 'Misc 5' tab selected. The 'Clinical Equipment' list is visible, and the 'Add' button is highlighted with a yellow box. A yellow arrow points from the 'Add' button to the 'Add' button in the instructions.

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.

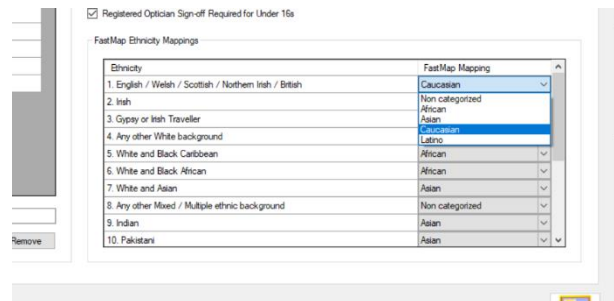
To set an equipment default for a consulting room/location, navigate to the computers tab in the maintenance module of i-Clarity.

Colleges	Computers	Corporates	DD/SO Comms	Devices	Exam Types	Form Permissions	GPs	Lens Criteria	Misc	Misc 2	Misc 3	Misc 4
Computer Name	Notes	Branch	POS Printer	Tonometer	Scan							
ACER-5720	Consulting Room 1	Bristol Eyecare	None	[NONE]								
acquisition	OCT Room	Bristol Eyecare	None	[NONE]								
bec2srv	Dispensing 1	Bristol Eyecare	POS Printer REC	[NONE]								
bml-tablet	Pre-Screening	Bristol Eyecare	None	[NONE]								

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.

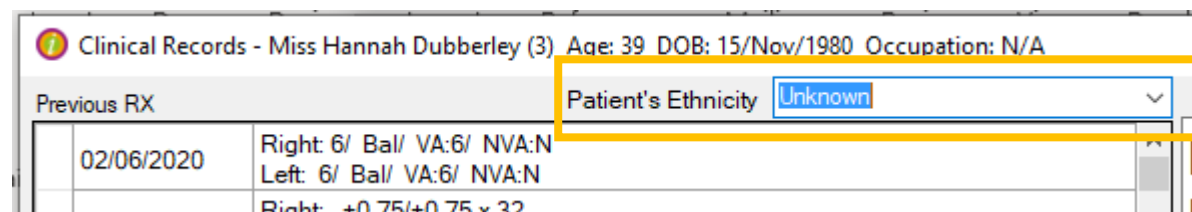
Mapping NHS ethnicities to OCT software

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

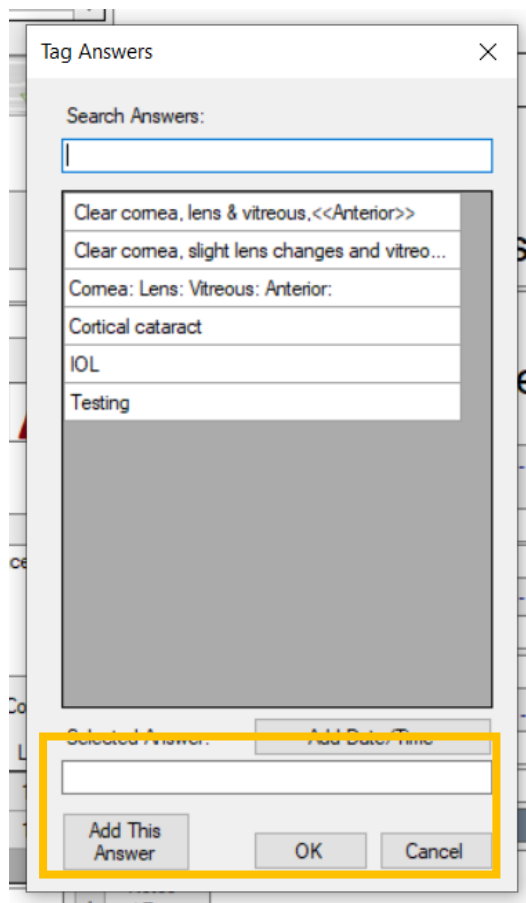
Edit record warning

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.