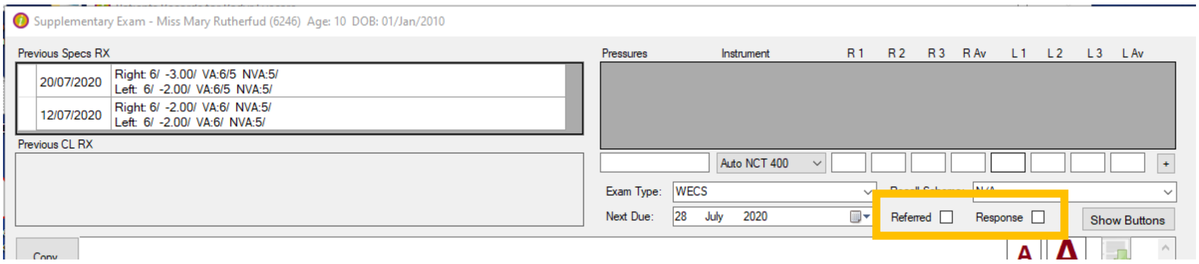
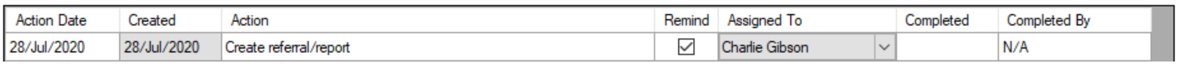
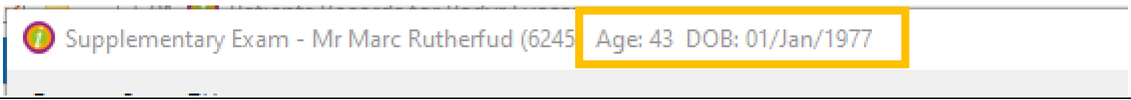
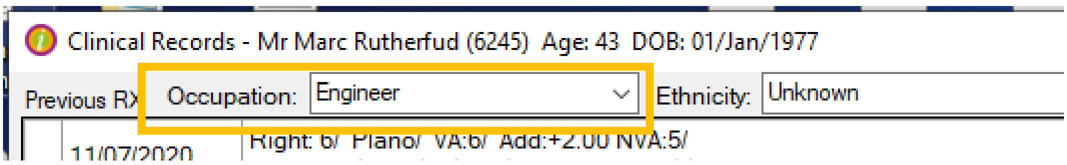
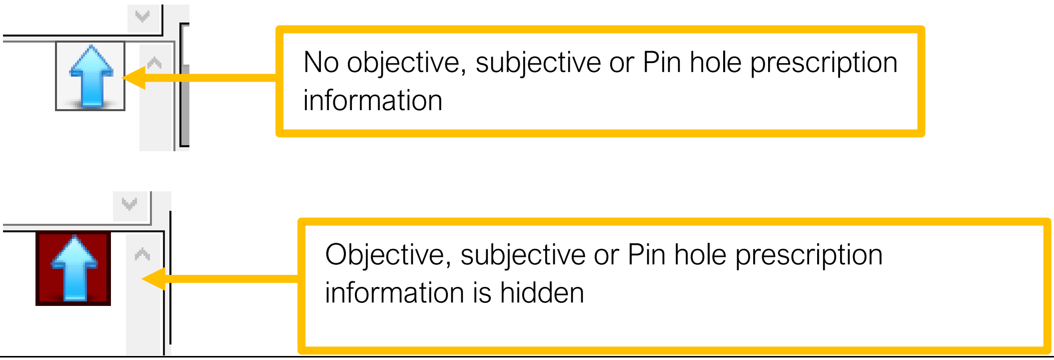
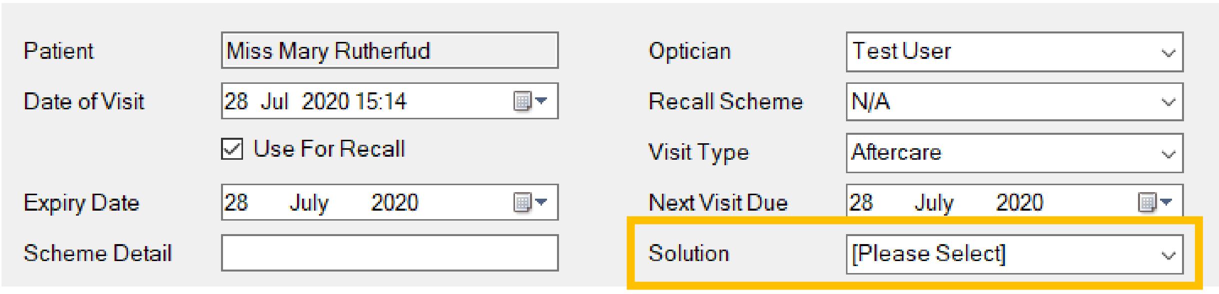
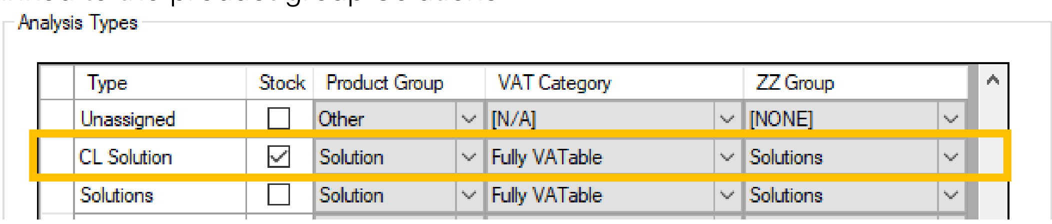
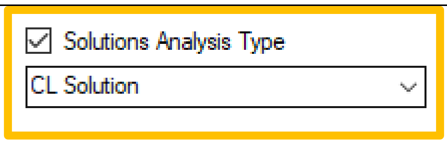
# Version 3.3.2 Enhancement list

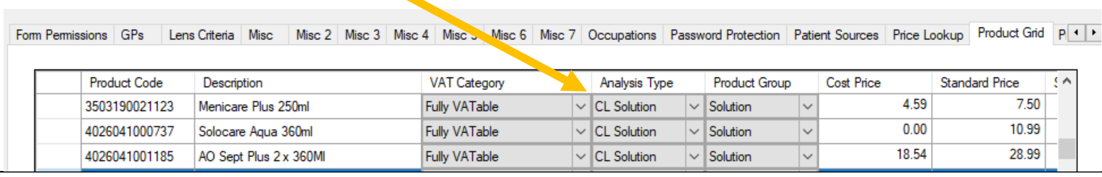
i-Clarity Version 3. 3. 2

| Prescription and Clinical Record Enhancements | |
|---|---|
| **ID** | **Description** |
| 3263 | Referred and Response Tick boxes have been added to the Other Exam Form.<br><br><br>*Using the referred tick box:*<br>*If you are referring the patient tick the referred box. On confirming the clinical record this will create and action point on the patient record assigned to your user login.*<br><br><br>*You can then use the action list to double check you have complete all patient referrals for that day.* |
| 3327 | Pressing 'Ctrl-D' on the pre-screening form will now enter the date and time like all other clinical record forms |
| 3330 | A note of the patient age and DOB have been added to the top of the non-sight test clinical record form<br><br> |
| 3329 | Occupation is now a drop-down option in the clinical record.<br><br><br>Any selection made in this box will update the occupation field on the further details tab of the main patient record, once the clinical record has been confirmed.<br><br>Once the clinical record is confirmed the occupation that was selected in the clinical record will be fixed to that clinical record so that subsequent changes to the occupation field in further details do not edit the information that was recorded on the clinical record. |

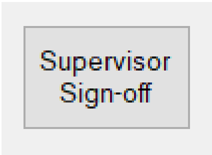
<table>
<tr><td></td><td>When you create a new clinical record, the occupation selected on the further details tab will be automatically selected in the occupation field on the clinical record - but it is open for editing if needed.</td></tr>
<tr><td>3066</td><td>If objective/subjective/PH prescription fields is completed on a clinical record, then the background colour of the arrow will change to red to show prescription information is hidden<br></td></tr>
<tr><td>3334</td><td>There is a new field in the CL Rx form and the Contact Lens Clinical form called solution.<br><br>On new unsaved forms this will display a drop-down list of solutions.<br><br>Select the solution the patient uses.<br><br>After the record has been saved this will turn to a free text box.<br><br>Setting up this feature:<br>This drop-down box will show products that are linked to a specific analysis type.<br>1. In maintenance, navigate to the analysis type tab.<br>2. Unless you already have an applicable analysis type, create a new analysis type linked to the product group Solutions.<br><br>3. Navigate to the Misc 7 tab in maintenance, and select the applicable analysis type in the field ‘Solutions Analysis Type’</td></tr>
</table>




4. Ensure all the solutions you would like to appear in this list have the correct analysis type selected.




The supervisor sign-off feature has been added to the spectacle prescription form.




Once the prescription has been saved click on the ‘Supervisor Sign-Off’ button.

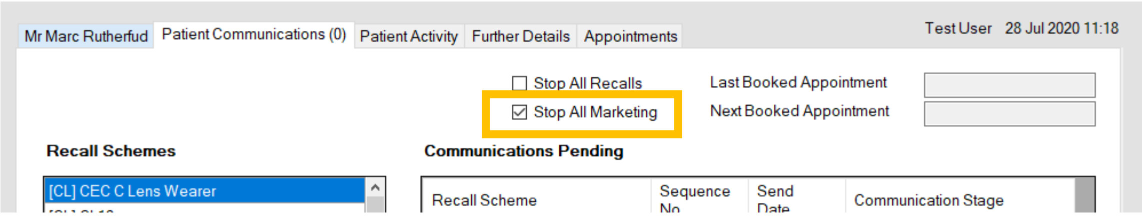
The supervisor signing off the examination should enter their i-Clarity password.

This will change the button to say who the examination was signed off by


Scottish and English Electronic Claims: Prescriptions/Clinical records that have been signed-off by a supervisor will now carry the name of the supervisor through to the electronic claim.

<table>
<tr><th colspan="2">Marketing Enhancements</th></tr>
<tr><th>ID</th><th>Description</th></tr>
<tr><td>3257</td><td>

**Stop all Marketing:**
A new tick box has been added to the patient communications tab, called ‘Stop All Marketing’

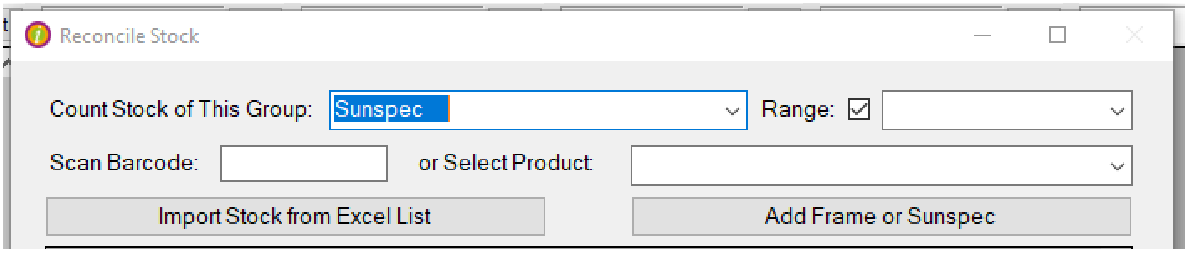



Ticking this box will stop the patient appearing in the marketing module for all communication types. Except when the search patient database and ignore communication preference options are selected in marketing.

</td></tr>
</table>

<table>
<tr><th colspan="2">Stock Module Enhancements</th></tr>
<tr><th>ID</th><th>Description</th></tr>
<tr><td>3323</td><td>

The range field in the stock reconcile window has been enhanced so that it shows a drop-down list of ranges on the system or can be used a free text box.




If there is a tick in the box it will allow you to select a range from the drop-down list. Removing the tick will allow you to type in the field.

</td></tr>
</table>

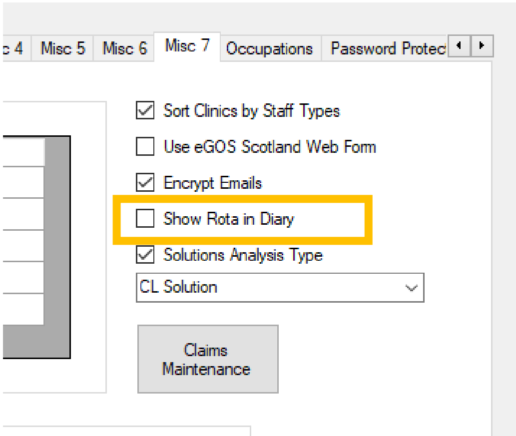
<table>
<tr><th colspan="2">Cl Mgt Enhancements</th></tr>
<tr><th>ID</th><th>Description</th></tr>
<tr><td>3341</td><td>

Modify this patients’ payments has been enhanced so that it can be used after a mandate has been cancelled.

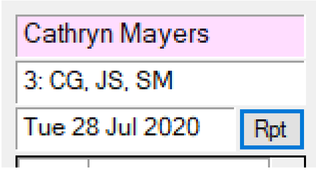
n.b. The feature will not be available if the patient has never had a mandate created.

</td></tr>
</table>

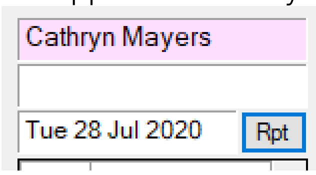
<table>
<tr><th colspan="2">Appointment Diary Enhancements</th></tr>
<tr><th>ID</th><th>Description</th></tr>
<tr><td>3328</td><td>There is now a button in maintenance called ‘Show Rota in Diary’

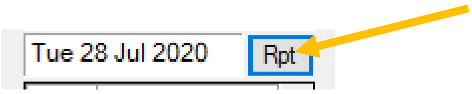


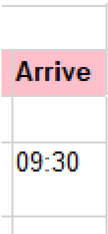

Selecting this option will show the username of the staff marked as present on the rota at the top of the clinics for the day.

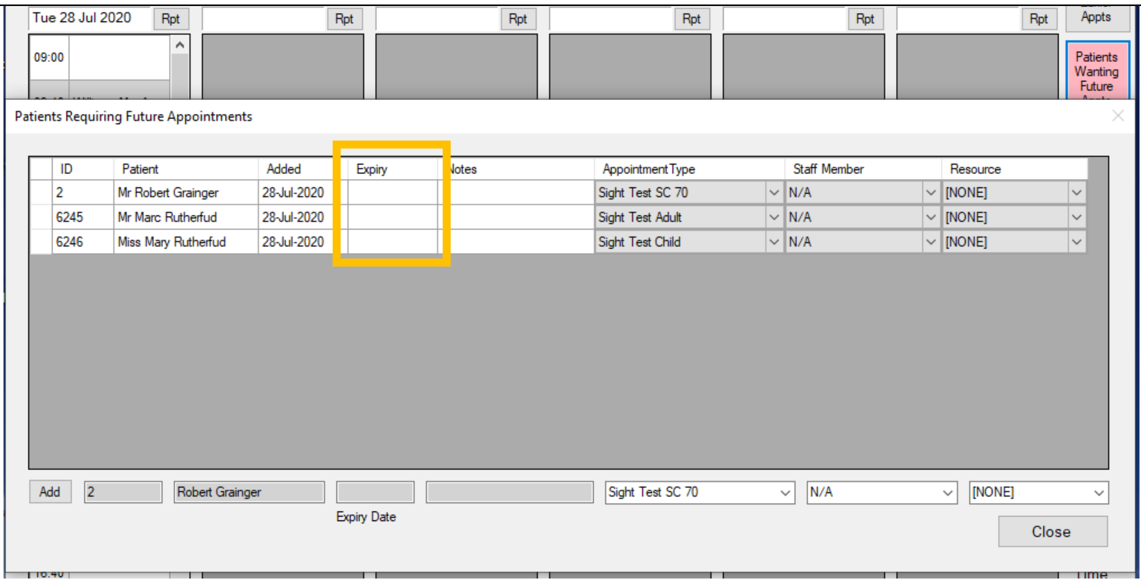



If you would like to hide this information from the appointment diary then unselect this box.


</td></tr>
<tr><td>3324</td><td>Appointment early arrival times are now shown on the clinic report that can be generated from the top of each clinic.

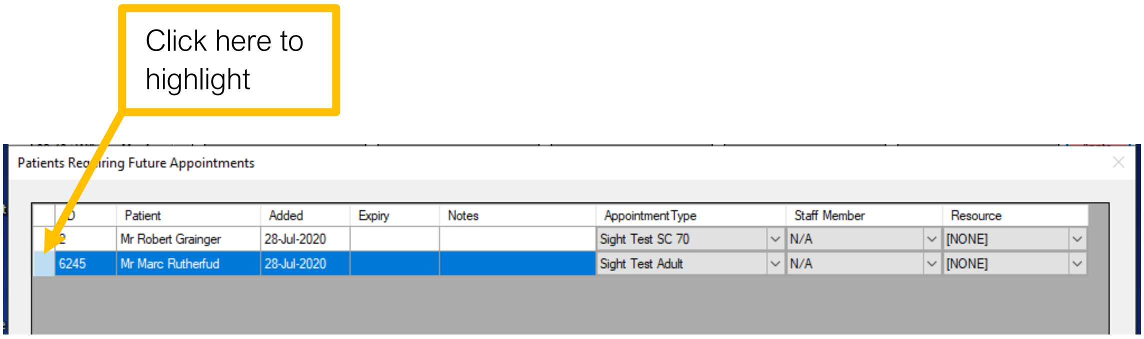




</td></tr>
<tr><td>3338</td><td>Patients wanting future appointments: The feature has been enhanced so that a default expiry date is not automatically entered. Bespoke expiry dates can still be entered if required.</td></tr>
</table>



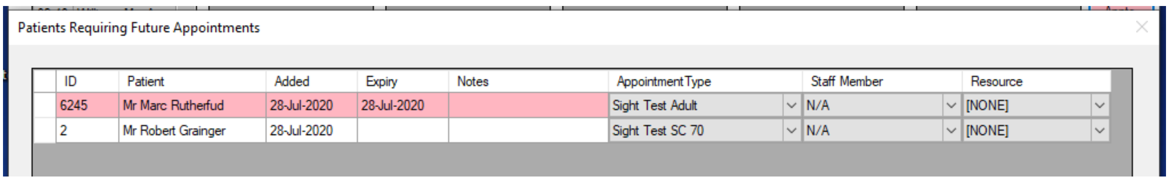

Patients will be removed from this list automatically if a bespoke expiry date is entered and passes or if an appointment is booked for this patient after the date they were added to this list.

A patient can be manually removed from the list by clicking on the box to the left of the ID number so the whole line is highlighted and by then pressing delete on the keyboard.

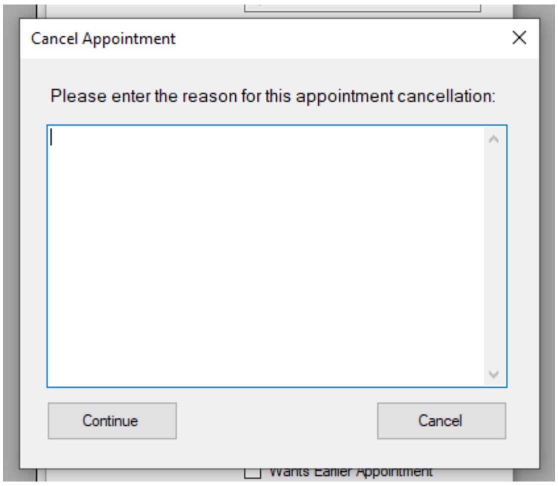


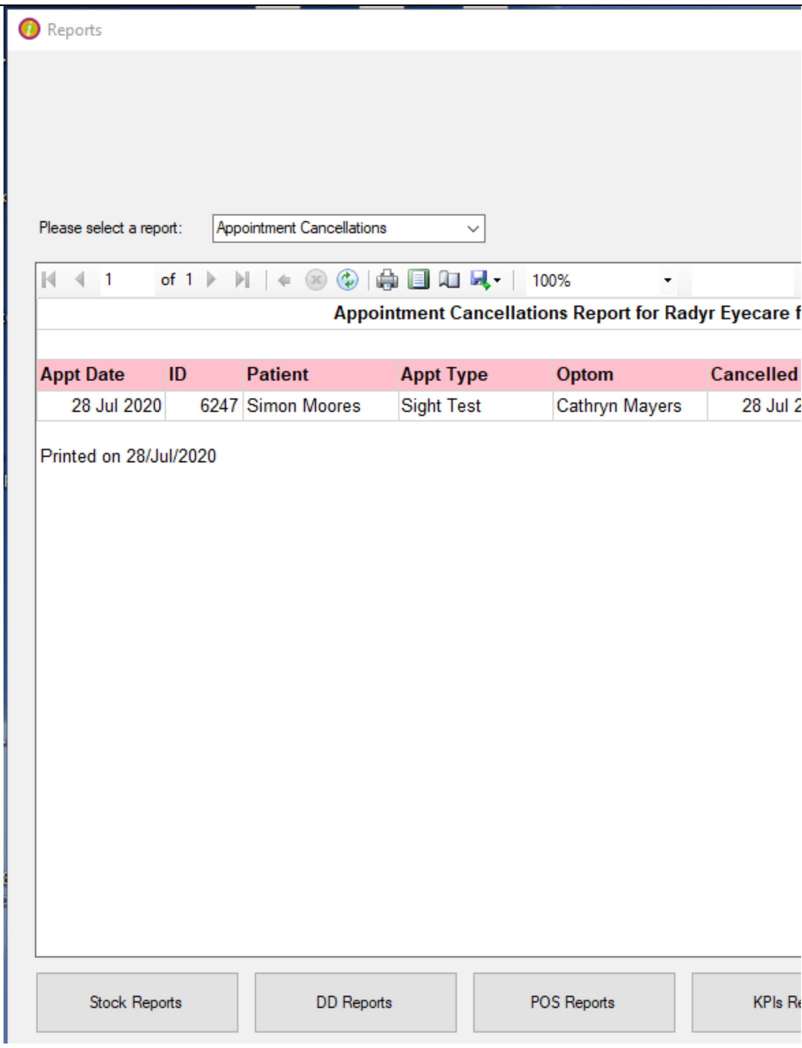

*n.b. Double clicking on the patient name will open the patient record*

3339 **Patients wanting future appointments:** If an expiry date has been entered for a patient wanting a future appointment then when the date of expiry matches todays date the entry will be highlighted and moved to the top of the list.

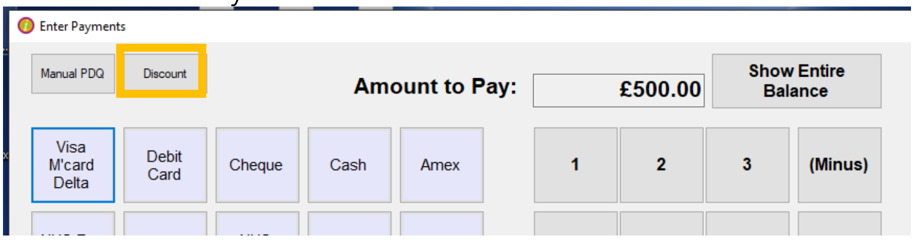
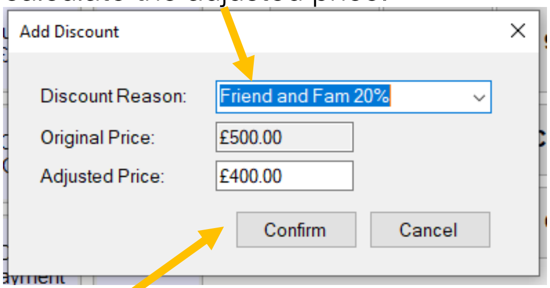


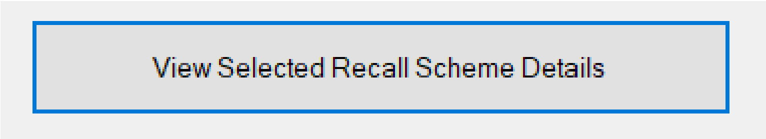
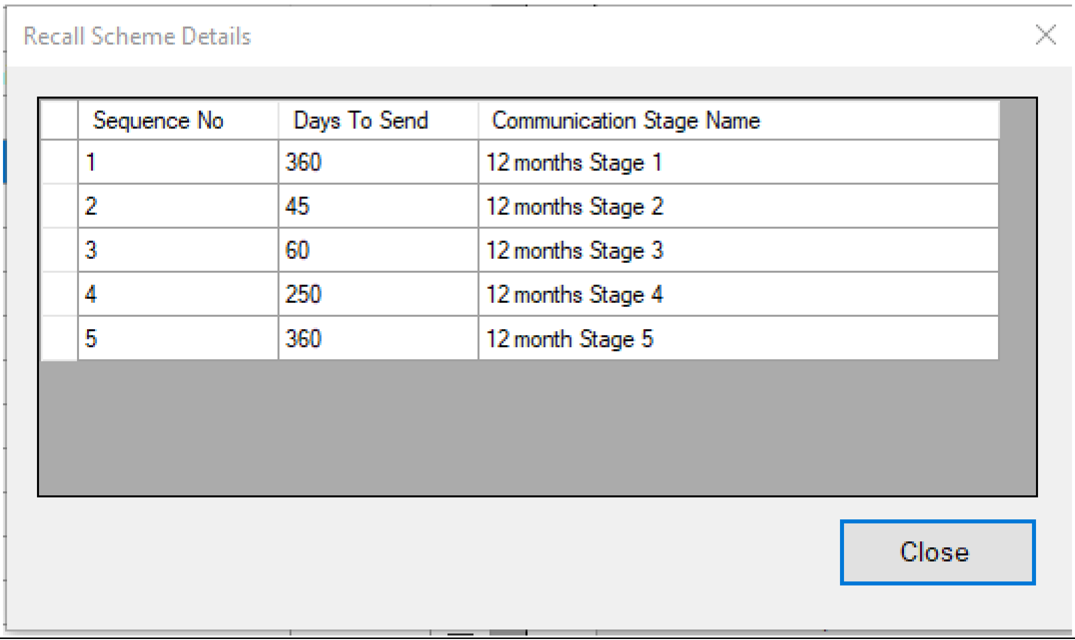

3340 **Patients wanting future appointments:** If there are patients wanting future appointments then the button colour will turn pink

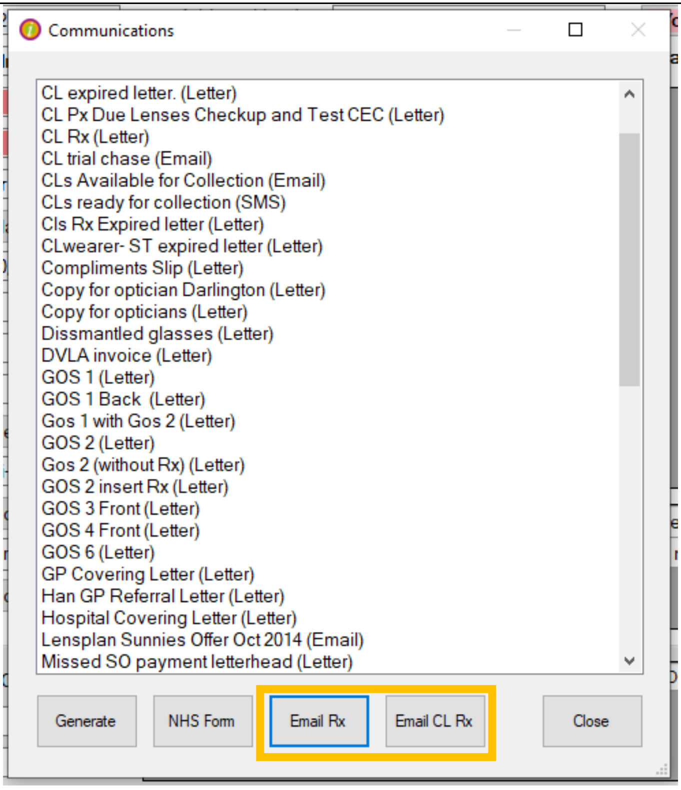
| | |
|---|---|
| | <br><br>This has been enhanced so that it will turn from pink to red if there is a patient in the list who has an expiry date for their future appointment request that matches today.<br><br> |
| 3342 | When you cancel an appointment, a box will now appear for you to type a cancellation reason in.<br><br><br>**The cancellation reason will appear in patient activity along with the note about the appointment cancelation.**<br>This feature has a corresponding report that can be used to see how many appointments were cancelled with in a selected time period and why. |



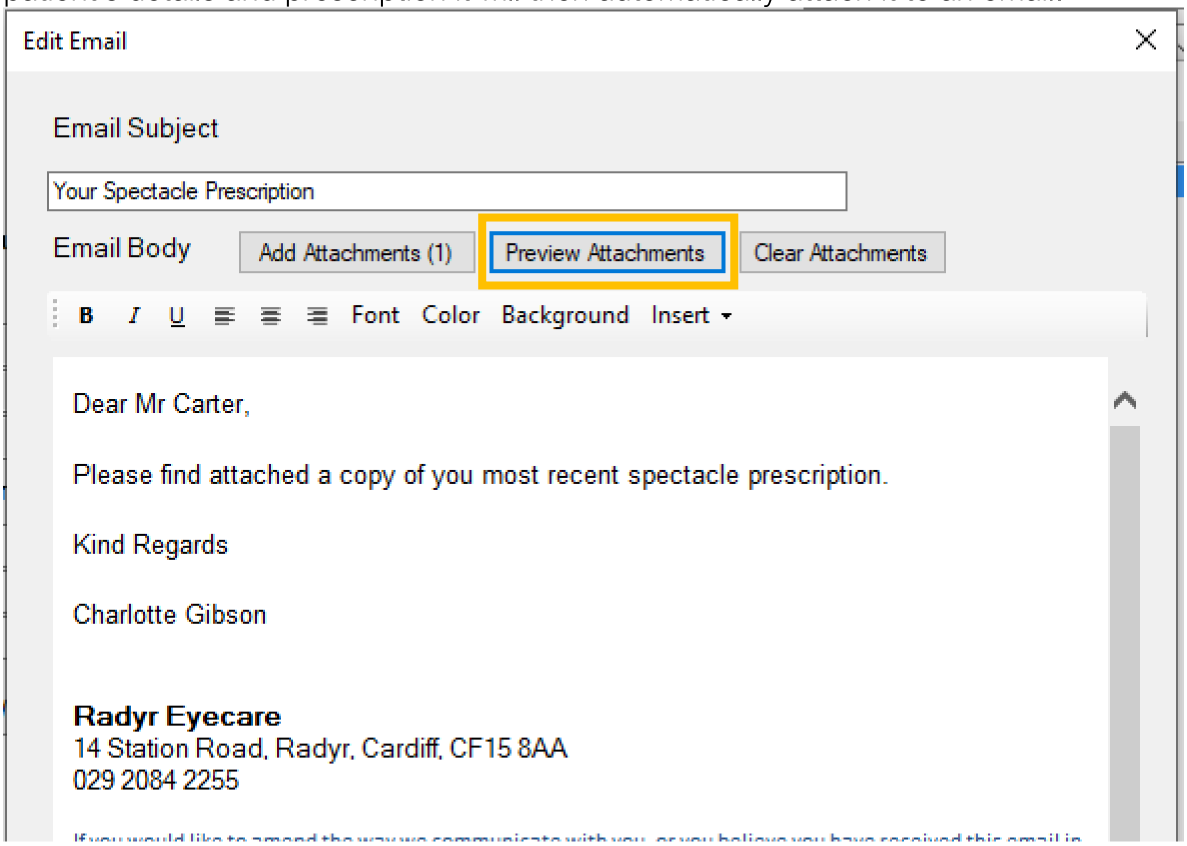

*n.b. This feature new feature can be turned off if you would not like to record cancellation reasons at your practice. If you would like to turn this feature off, please call i-Clarity support*

| Point of Sale Enhancements | |
|---|---|
| **ID** | **Description** |
| 3197 | A discount can now be applied to a sale after the sale details have been applied to the patients account.<br><br>On the ‘Enter Payments’ screen click on the discount button.<br><br>Select the Discount Reason from the ‘Add Discount’ window. This will automatically calculate the adjusted price.<br><br>*The adjusted price can be overtyped for miscellaneous adjustments.*<br><br>Click Confirm<br><br>The adjusted price will be shown on the entered payments screen.<br><br>You can now click cancel if you are not adding a payment to the sale today or complete the payment as normal by selecting the payment type and then confirm amount and confirm total. (The amount being paid can also be amended for deposits as normal.)<br><br>*n.b. this feature can only be used on the day the <u>sale</u> was entered onto the till. If you need to reduce the amount the patient is expected to pay on a day after the sale was entered, then the write off function should be used.* |
| 3326 | **Online payment:**<br>1. The subtype of an online payment is now displayed in the review payments of cashing up<br><br>2. In maintain bankings in cashing up there is reference to the online payment subtype<br><br>3. To prevent fraud, you cannot change the payment type online payment or bacs to another payment type. And you cannot change a payment type to online or bacs. Amounts of online or bacs payments cannot be changed in the review payments of cashing up. Any corrections must be made on the patient record using the amend payment button |

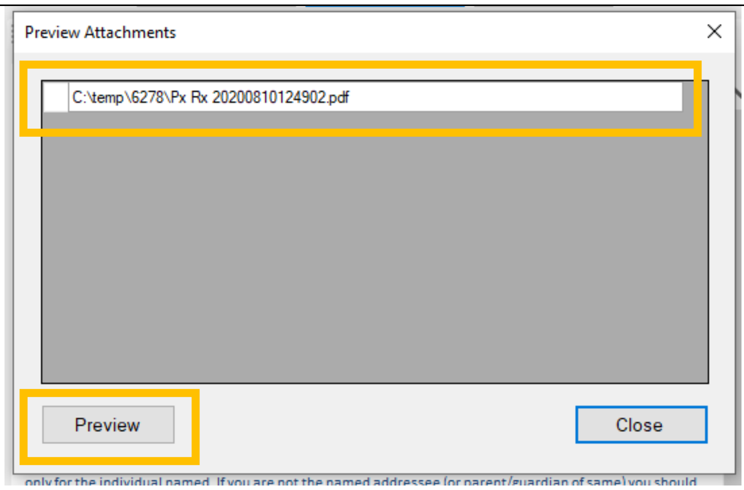
<table>
<tr><th colspan="2">Communication Enhancements</th></tr>
<tr><th>ID</th><th>Description</th></tr>
<tr><td>3332</td><td>A new button has been added to the recall module called ‘View Selected Recall Scheme Details’<br>

<br>
Clicking on this button will show the details of the selected recall scheme<br>

</td></tr>
<tr><td>3343</td><td>Email Rx and Email CL Rx:<br>Two new buttons have been added to the bottom of the communication window that opens from send note or create document, called ‘Email Rx’ and ‘Email CL Rx’</td></tr>
</table>




Clicking on either of these buttons will create a pdf document and populate it with the patient's details and prescription it will then automatically attach it to an email.




To check the pdf prescription before sending click the 'Preview Attachments' button




Click on the document and select Preview.

*n.b. a copy of this pdf rx is saved to the patient document folder automatically*

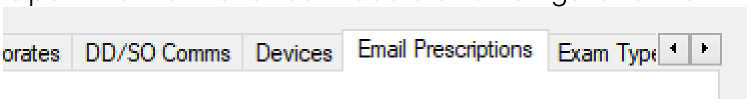
**Setting up this feature:**
This ‘Email Rx’ and ‘Email CL Rx’ button links to a specific word document and an email template for each designated i-Clarity user.

Each user has a specific word document so that you can add an image of the Optometrist signature to the document.

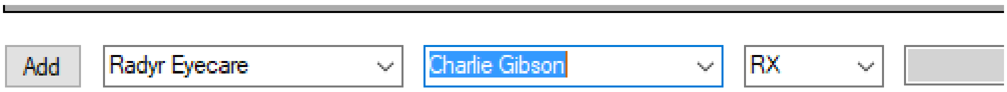
Clicking the Email Rx or Email CL Rx button will cross reference the user logged in with this table so only Optometrists can generate an email prescription with their signature on.

When generating this email Rx a pdf copy will be saved to the patient documents folder so that if a copy of the original emailed Rx/CL Rx needs to be printed or emailed again to the patient then this pdf can be retrieved and printed or attached to an email that has been created by double clicking on the patient email address.

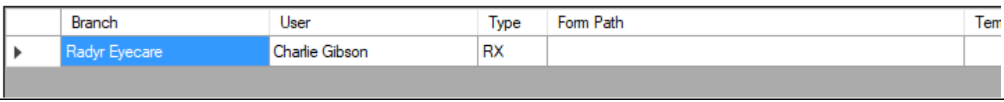
1. Open the maintenance module and navigate to the Email Prescriptions tab.



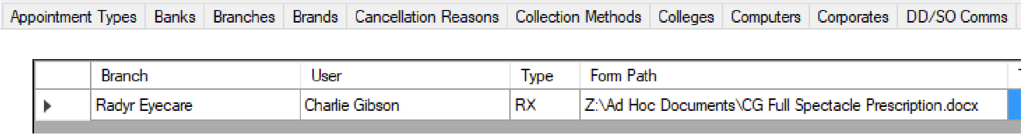

2. Select the branch, the Optometrist name, and if you are adding a Rx or CL Rx document.



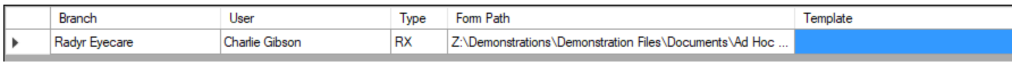

3. Click the Add button
4. This will add a new line to the grid



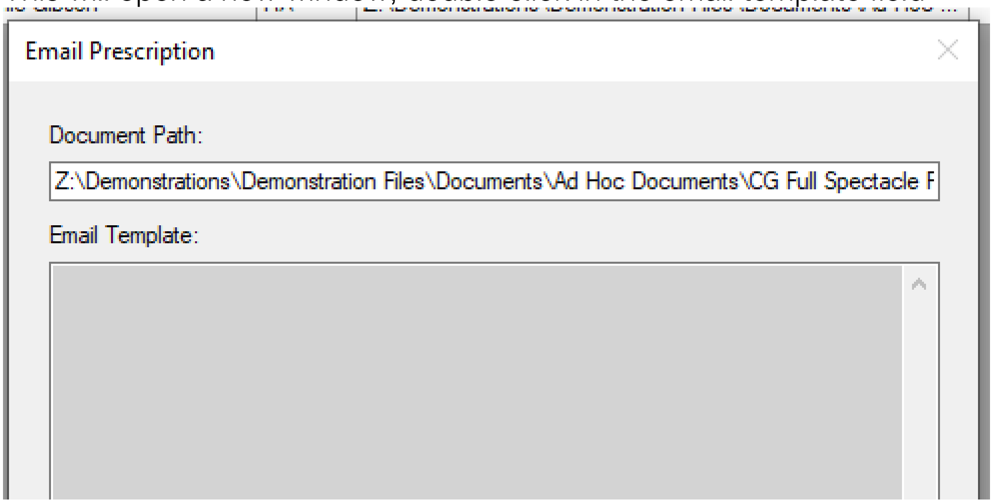
5. Copy the pathway of the prescription document you created for the optometrist in the form path field. The pathway should also contain the document name and file type.



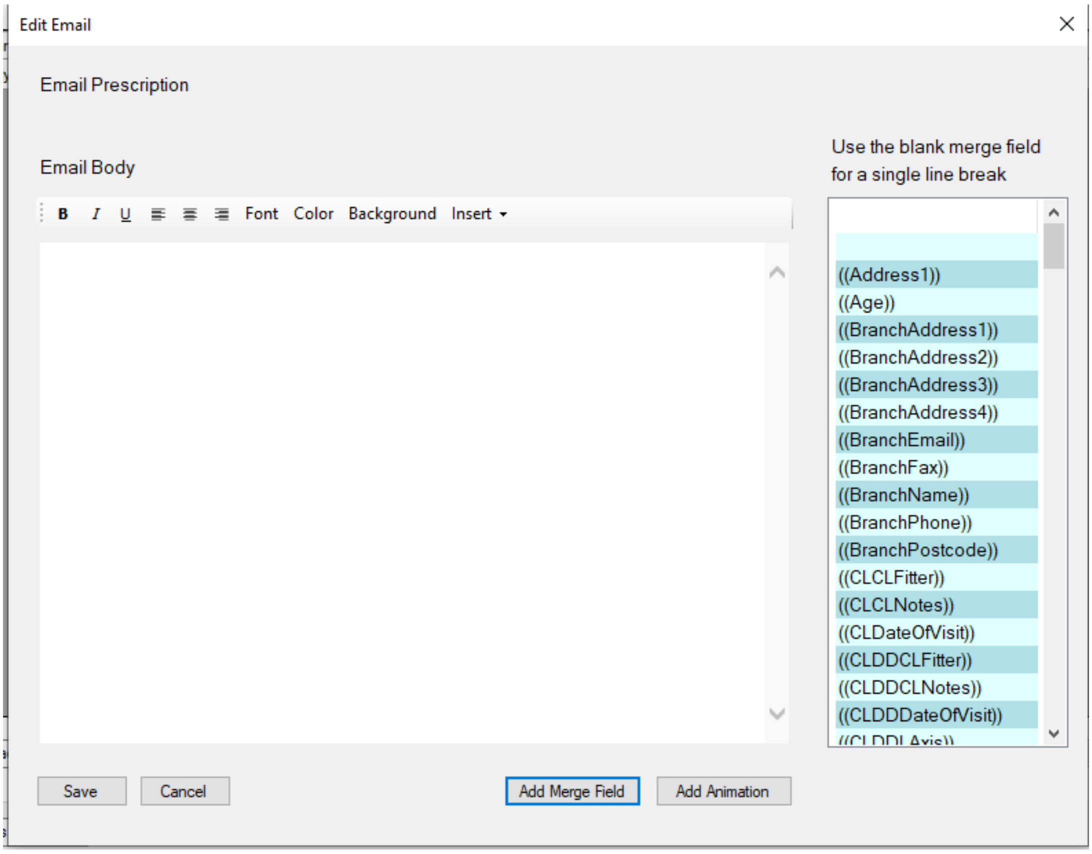

6. Double click on the Template field for this line

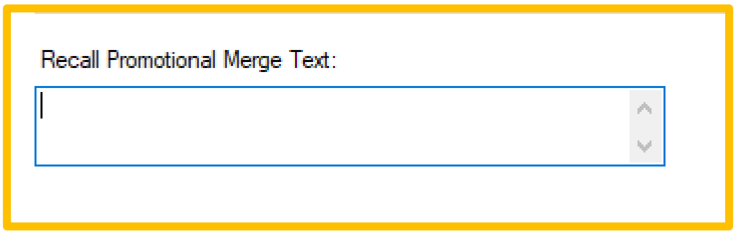


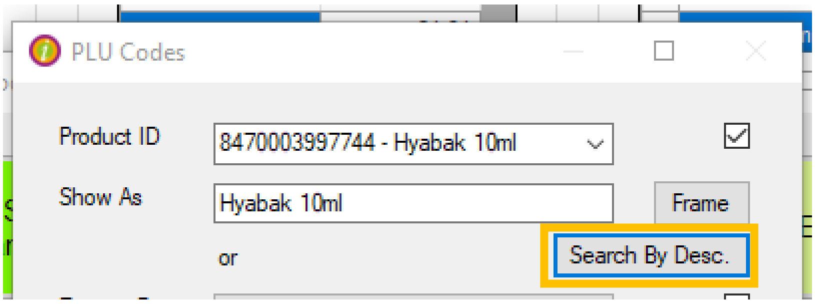
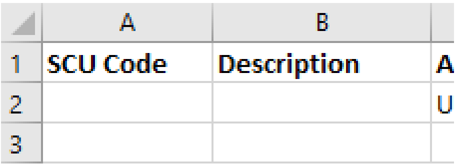

7. This will open a new window, double click in the email template field

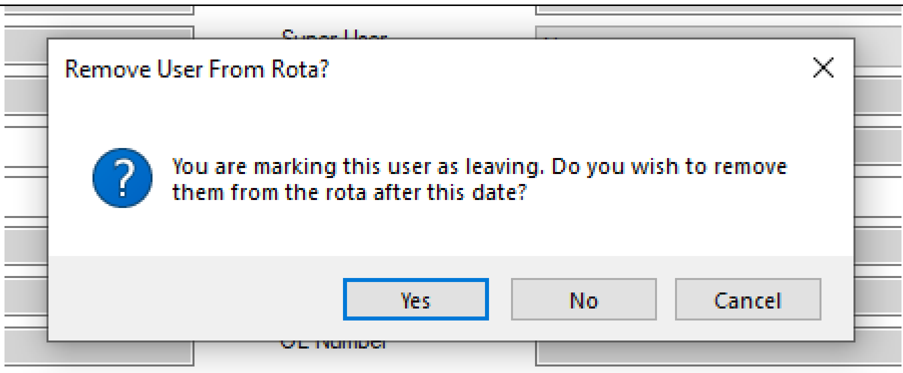



8. You can now create your email template to go with the prescription attachment.

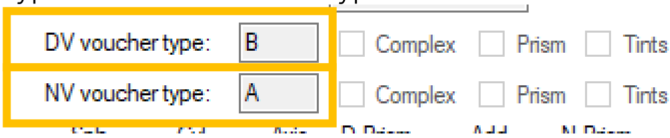
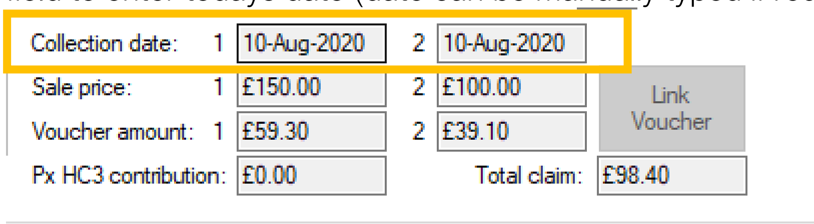


| | |
|---|---|
| | Complete this process for a contact lens prescriptions and other optometrists as required. |
| 3063 | A new merge field has been created for recall letters and emails called<br>**«PromotionalText»**<br><br>This merge field corresponds to a field on the Misc 7 tab of Maintenance.<br><br><br><br>*This merge field can be added to all recall letters and emails. If the field in maintenance is empty, then when the recall letters are generated the merge field text will be removed from the recall. If the field in maintenance contains text, then it will be entered onto the recall in place of the merge field when generated. This will allow you to add temporary information to recalls with out having to edit each individual communication.* |

| Maintenance Enhancements | |
|---|---|
| **ID** | **Description** |
| 3223 | A scroll bar has been added to the SMS field on the Misc 2 tab if the content goes over the current viewable space. |
| 3325 | A new product maintenance spreadsheet has been added to the system, called 'Create Misc Spreadsheet'<br><br>This spreadsheet will allow you to add products of type Accessory, C Lens, Glazing, Lens Finish, LVA, Solution, Prof Fee and H Aid to i-Clarity |
| 3180 | Receipt name field has been added to the lens spreadsheet |
| 3181 | Receipt name field has been added to the product spreadsheet |
| 3222 | The ability to search by description of product has been added to the PLU code maintenance.<br><br> |
| 3333 | A new column has been added on the frame import spreadsheet, SCU code.<br><br><br><br>This will allow you to add frames with a specific SCU code rather than having to have the auto generated SCU code.<br><br>This field does not have to be completed, if left blank an automatic SCU code will be generated for the frame on import. |
| 3336 | The requirement for a lunch start time when creating a user has been removed. |
| 3337 | Rota Maintenance:<br>If you now mark a user as left in maintenance, it will ask if you want to remove all entries of this user from the rota past this left date. |

| | |
|---|---|
| |  |

| Multi Branch Enhancements | |
|---|---|
| ID | Description |
| 3331 | A new field has been added to the system database called ‘internal branch name’<br><br>This will allow you to have a different branch name shown internally e.g. when you select a branch to log in, to the branch name that is merged into documents, emails, and text messages.<br><br>This is aimed at multibranch practices that would like all branches to go by the same name publicly but need different branch names internally so users can log into the correct branch. |
| 3346 | The field for frame label name has been changed from company level to branch level. This will allow multibranch practice to have the individual branch name printed on the label rather than a company name.<br><br>No change will be automatically made to your system. The current data in this field has been copied to the new frame label name field. |
| 3352 | Branch payment date was updated individually on login of a computer at each branch, all branch payment dates will now update at the same time |

| eGOS Fixes and Enhancements | |
|---|---|
| ID | Description |
| | Complex GOS3 vouchers will submit successfully |
| | First voucher type and second voucher type fields have been renamed to DV voucher type and Near voucher type<br><br>The voucher type for any distance or mulitvision spectacles should be entered in the DV voucher type field.<br><br>The voucher type for any near spectacles should be entered in the NV voucher type field. |
| | A collection date for spectacles now needs to be entered in GOS3 claims.<br>When completing the final part of a GOS3 claim double click on the Collection date field to enter todays date (date can be manually typed if required)<br> |
| | Change of layout on the GOS1 for the voucher type information.<br>The tick box for complex is now in line with the voucher type field |
| | Change of wording on the GOS1 for the prescription outcome. |

| Fixes | | |
|---|---|---|
| | | |
| 2940 | General | A process is run to prevent the system config error that occurs and prevents log in to i-Clarity. |
| 3045 | General | An extra check is now in place to reduce occurrence of i-Clarity uninstalling on log in when internet connection is poor. |
| 3208 | CL Rx/Clinical | DD Calculator was showing non-current products. |
| 3307 | General | i-Clarity was not compatible with a 64 bit version of word. |
| 3308 | English eGOS Claims | The character limit of the contractor name in England eGOS has been increased to 255 characters |
| 3309 | Scotland: Px Record | Scotland. If there was a space at the beginning of the CHI number no changes to the patient record could be made but the error message did not state clearly the reason for the error. Error message has been changed to explain the issue so it can be resolved more easily. |
| 3310 | Clinical | When clinical records locked automatically, if another user logged in it would let them take over the system, but they could not do anything because the system kept telling them to close clinical records. |
| 3311 | Purchase Order Processing | When receiving purchase orders, there was no locking mechanism, which meant a purchase order could be received multiple times from the different computers, if it was opened on one and left unconfirmed. |
| | | Payment type 'Other card' was showing as style on reports |
| 3312 | POS | Walk In.<br>If you ticked a sale and then clicked refund selected sale but cancelled on the enter payment screen the whole process was not cancelled leaving an outstanding sale that could not be paid or removed. |
| 3314 | Maintenan ce | Frame import spreadsheet. If the frame import spreadsheet started with products that did not have any alphabetical characters, then frames further down the spreadsheet that do have words will be entered as blank product descriptions |
| 3315 | CL MGT/Cash-up | Payments against DD/SO automatically makes a negative DD/SO Adjustment in Banking, and BACS automatically makes a positive Credit Transfer in Banking, but BACS payments against DD/SO did not make both auto corrections and should have.<br><br>n.b. also corrected for Online Payment |
| | Marketing | Spelling mistake on new field 'Ignore communicate perferences' |
| | Claims | There is a discrepancy in the prescription type filter between 'Bring GOS3 up to date' and the default population of the MostRecentPrescriptionID from the stored procedure |
| 3319 | Maintenan ce | If you double click on the email subject in ad hoc documents, it opens an edit email form. Any text entered in the subject field won't be saved. |

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| | | JF – only on a new email just added with blank subject. Same issue fixed in a few other places. |
| 3321 | Purchase Orders | After selecting an order, you can click on retrieve multiple times, it will populate the order multiple times<br><br>JF – this was by design, we thought it was the lesser evil. What would you expect to happen if, for example, you selected it once, marked the items as none to receive, then selected it again?<br><br>CG's solution – disable button on clicking, and re-enable on reselection of order |
| 3322 | Purchase orders | 'Dispatch note ref' should not be applied to items that have a zero quantity it the retrieve products form |
| 2967 | Scottish Claims | Scotland: If you load optom details in claim form and then switch to a different exam type the optom details should clear so you have to reload optom details again.<br>To prevent you putting a claim form through with the wrong optom name (might need to check |
| | Spectacle Orders | If a height was entered on to a single vision order the height direction was not printing on the order |
| | Clinical | If you were editing an existing clinical record with the warning feature turned on it would remind you ever time the clinical record auto saves. The warning now only appears once when initially starting to edit the clinical record |