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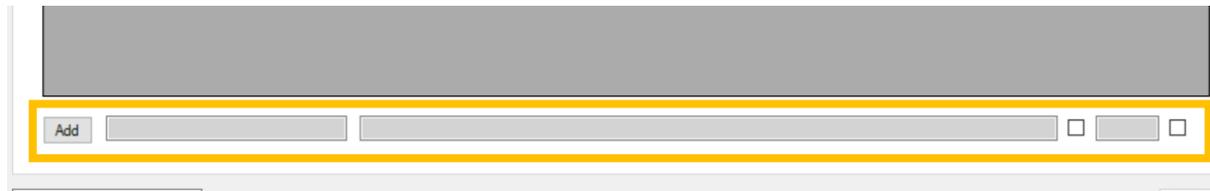
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Clinical Set Up

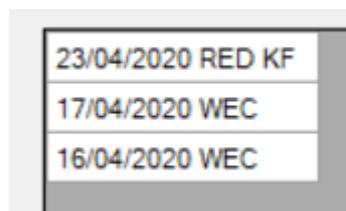
Exam Types

You can add different types of supplementary exams. These types are then made available in the non-sight test section of clinical records.

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.

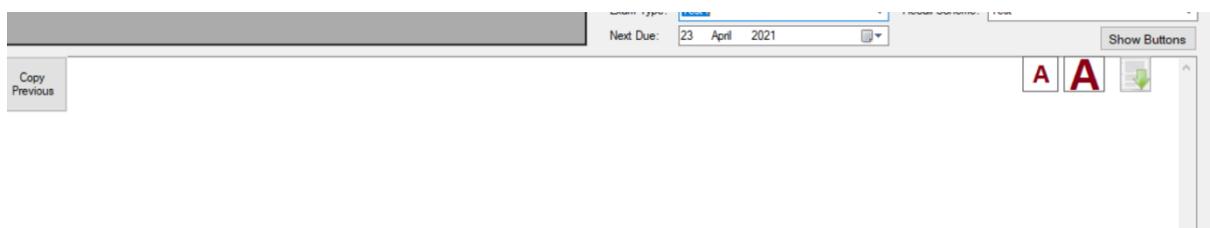


23/04/2020	RED KF
17/04/2020	WEC
16/04/2020	WEC

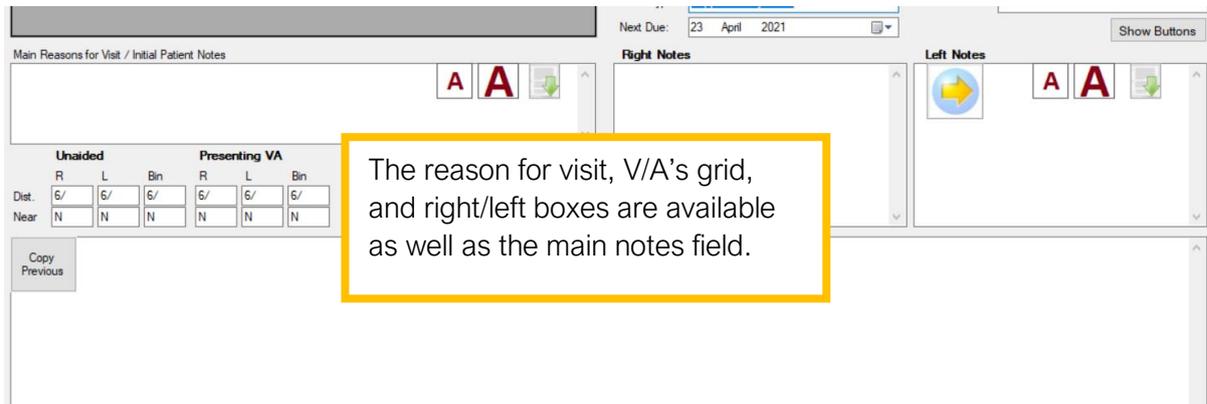
In the non-sight test area of the clinical module, you can easily see what each of the exams was by looking at the abbreviations.

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 just have a notes field:



If you check this box, when you select this exam type the record will show additional Rx and notes fields:



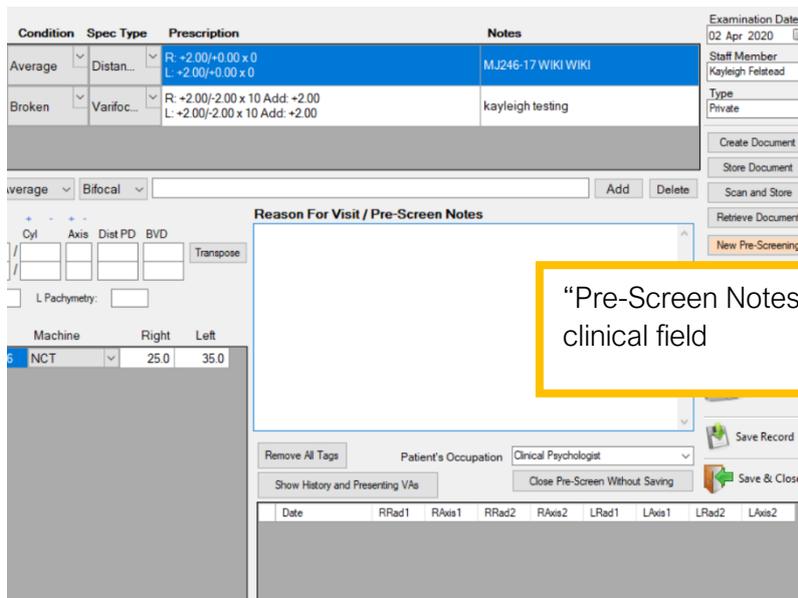
6. Click add.

Clinical Record Templates

There are several clinical records in i-Clarity that you can create templates for. You can create as many templates as you need for each section, E.g. you may have 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.

An example of the layout of each of the clinical records can be seen on the next few pages so that you can visualise how you may want your templates to look before you start.

Pre screen



Eye Exam

The screenshot shows a software interface for an eye exam. It includes sections for 'Previous RX', 'Main Reasons for Visit / Initial Patient Notes', 'Presenting VA', 'Ocular History', 'Medication', 'Prescriptions', and 'Clinical Notes'. Two yellow boxes with arrows point to specific fields: one points to the 'Main Reasons for Visit' section, and the other points to the 'Right Notes' and 'Left Notes' sections.

“Rx Reasons for visit” clinical field

“RX Right/Left/General” clinical fields

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: Ball/ Left: Ball/
 15/03/2020 Right: Plano/ Left: Plano/

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

Over-refract: NVA Transpose

Right Exam Notes Left Exam Notes

“CL current lenses” clinical field

“CL Right/Left” clinical fields

“CL outcome this visit” clinical field

Subjective Vision Sph Cyl Axis VA Add NVA

Right Left

Wearing Modality: <<WearingModality>>

Recall Scheme: N/A Use For Recall

Visit Type: Aftercare

Expiry Date: 02 April 2020

Next Visit Due: 02 April 2020

Outcome This Visit

Trial Lenses Supply Supply + Order Lenses Collected

Save Exit

Contact Lens Trials

Double click on a trial lens to load:

Created	ID	Lens	Vision	Sph	Cyl	Axis	VA	Add	NVA

Right ID: Left ID: Optician: Kayleigh Felstead Copy Right to Left

Over-refraction

Right Vision Left Vision

Right Parameters Left Parameters

Right Comments Left Comments

R collected on L collected on R confirmed on L confirmed on

Dominant Eye

New Trial Lenses Duplicate Trial Lenses Save Trial Lenses Order Trial Lenses Create New CL Record Overwrite CL Record Delete Trial Lenses Remove All Tags Close

“CL Trial Notes”

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

Instrument	R 1	R 2	R 3	R Av	L 1	L 2	L 3	L Av
31/Mar/2020 10:26 NCT				25.0				35.0

Exam Type: Test1 Recall Scheme: N/A

Next Due: 31 March 2020

Copy Previous

A A

You can create templates for this area. This record would be used for all enhanced and miscellaneous tests.

Rx CL Rx

Summary

Audit Record

Remove All Tags

Supervisor Sign-off

Imaging

Save

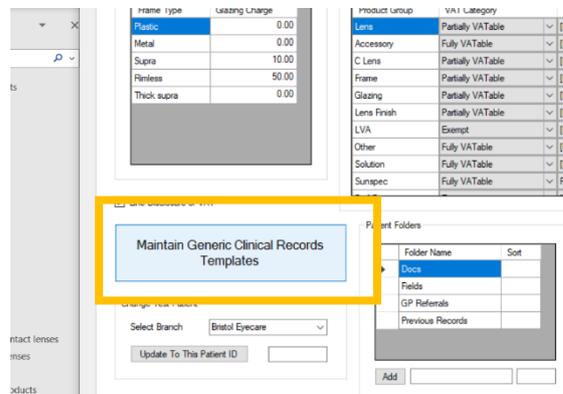
Exit

Edit/Create clinical record templates

Adding tags and answers

To create your templates, go to the Misc. 4 tab in the maintenance manual:

Click on the Maintain Generic Clinical Records Templates button. This will open a new window.



You can first create your tags.

We will be working on the right-hand side of the screen at the bottom:

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

Tag Text	Tag Answer
<<allergies>>	none.
<<Anterior>>	Ant quiet, VH 0.
<<CLWear>>	Never considered it
<<CLWear>>	Not interested
<<CLWear>>	Would like further details
<<Colour>>	Ishihara all seen
<<Colour>>	Ishihara, mixed plates-
<<Conj>>	3 and 9 o'clock staining.
<<Conj>>	Conjunctival chemosis.
<<Conj>>	Conjunctival injection-mild.
<<Conj>>	Healthy
<<Conj>>	Pinguecula temporal and nasal.
<<Conj>>	Sub conjunctival haemorrhage.
<<Comea>>	Clear
<<Comea>>	Comea clear.
<<Comea>>	Inferior dry eye staining.
<<Comea>>	No staining
<<Comea>>	Superficial punctate staining.
<<Cover>>	ORTHO D&N with and without
<<Cover>>	ORTHO distance, slight EXO near
<<Cover>>	C/T NO Rx DIST: <<Cover>> NEAR: <<Cove...
<<Cover>>	Dist ortho, near slight exo.
<<Cover>>	ESO large
<<Cover>>	ESO small
<<Cover>>	EXO large
<<Cover>>	EXO small
<<Cover>>	L/R

The top shows a list of tags and answers already in the system.

Review Template Delete Template Copy Generic Templates

separate eye-specific from general notes.

Add Show All Tags

Personal Documents Export Tags Import Tags Close

1. Enter the tag name, surrounded by chevrons <<for example>>, into the first box. The tag name is the text that will appear on your clinical records, indicating that some pre-defined options are available E.g. <<Medication>>
2. In the next box enter one of the options you would like to be available anywhere where the tag name appears.
3. Click add.
4. You can now repeat this process with the same tag name, 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.

Templates

Now, on the left-hand side of the screen you can create the template:

BVDs
 Pressures
 Sign Off
 D PDs

Double click

Compliance

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

Media: <<Media>>
 Disc: <<Disc>>
 Vessels: <<Vessels>>
 Macula: <<Macula>>
 Fundus: <<Fundus>>

Drops: <<Drops>>
 Post dilation Icare @: R: L: mmHg
 >>>> VA own Rx:
 Cover Test <<Cover>> Motility: <<Motility>> NPC: cm.

OMB Dist: Near: Fixation Disp Dist: Near:
 Accom: D. Colour:<<Colour>> Fields:<<Fields>> Notes:<<Notes>>

Import Template

with this name:

Preview Template

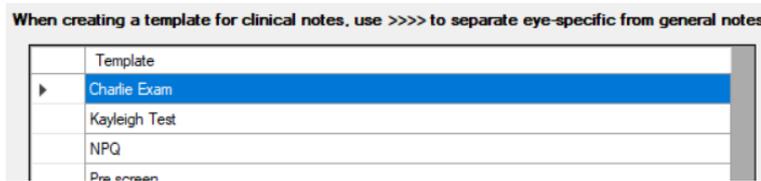
Delete Template

Copy Generic Templates

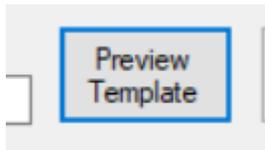
When creating a template for clinical notes, use >>>> to separate eye-specific from general notes.

	Template
▶	Charlie Exam
	Kayleigh Test
	NPQ
	Pre screen
	Std/Extended Eye Exam
	Test
	test 2
	test delete me

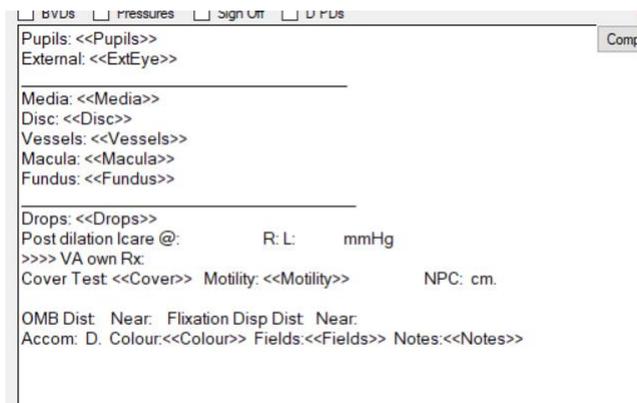
1. Highlight the template you want to edit by clicking on it once. If you want to make a new template, select any template from the list.



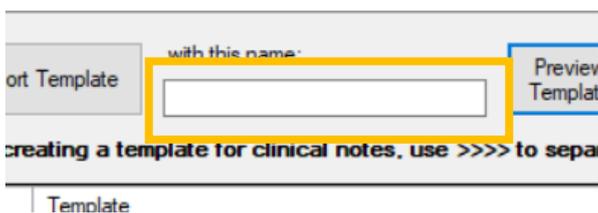
2. Click on preview template.



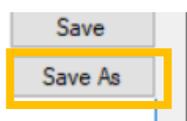
3. Write out the contents of your template in the space. Where you would like a list of tag answers to show type the tag text including the <<chevrons>>. This must match you tag answers added to the list exactly, including capitals and spaces.



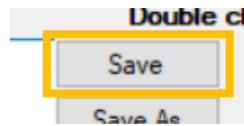
4. Type the name of your template in the “with the name” box at the bottom of the space.



5. Click on save as.



- If you are editing an old template, rather than making a new one, you can miss out set 4 and 5 and just click save instead.



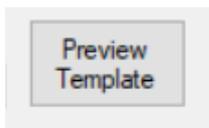
Choose compliant options

Once a template has been saved you can mark parts of it as “compliant”. If any section that is marked as compliant is not filled in a warning message will appear when the clinician tried to exit the record. You can also run a clinic outcomes report which will show you which records are, or are not, compliant.

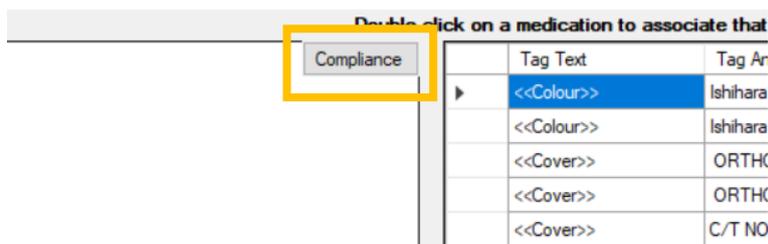
- Highlight the template you want to edit by clicking on it once.



- Click on “Preview template”

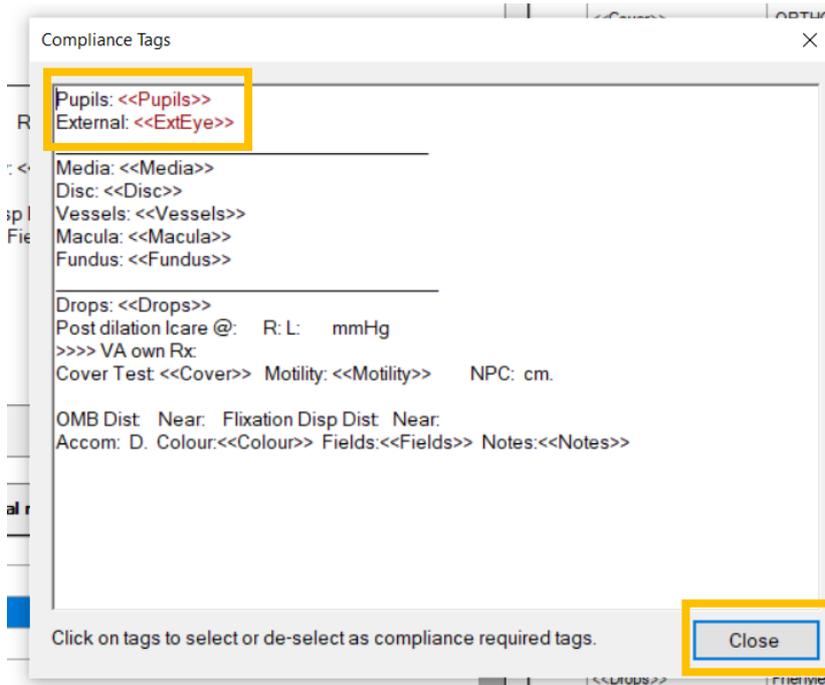


- Click on “Compliance” in the top right-hand corner of the template.

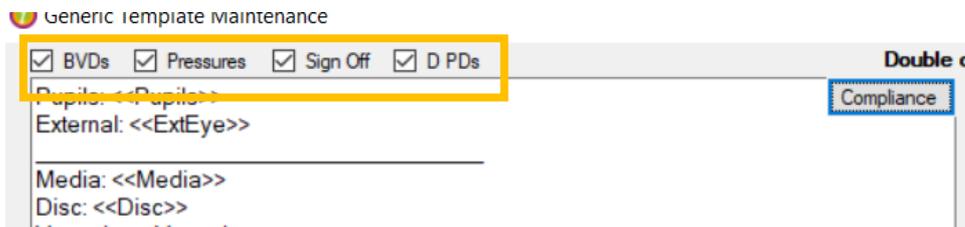


This will open a new window with your template details.

- 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.



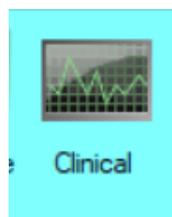
5. If you would like to make BVD's, Pressures, Sign-off and D PD's to be compliant areas you can tick the check boxes at the top of the template.



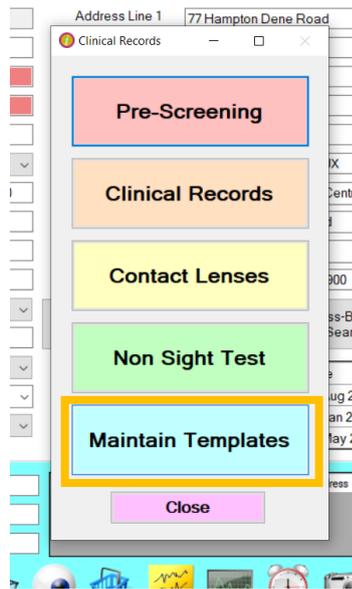
Create user specific clinical record templates

Users can also create personal templates from within the clinical module:

1. Go to the clinical module:

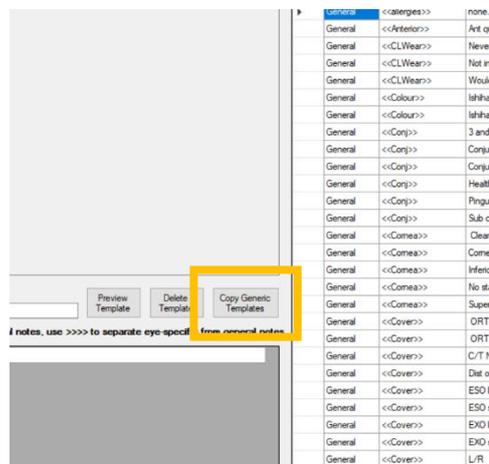


2. Click on Maintain Templates



This will open the template maintenance as shown in clinical set up.

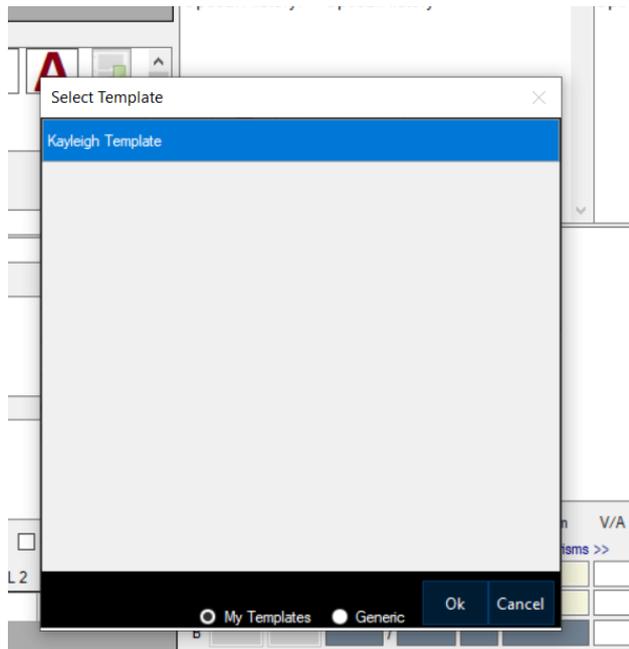
3. Click on the Copy Generic Templates button.



This will move the generic templates into your own profile. You can edit these templates and save them as new ones by following the steps in the [Templates](#) section on page 8.

Any generic templates that you do not need in your personal profile can be deleted by highlighting them and clicking on “delete template”. 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 clinical record:



Assign clinical record templates to users

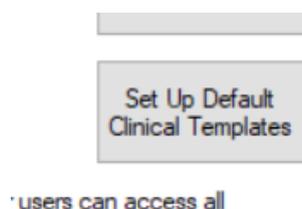
These personalised templates and any generic template made in maintenance will be available for clinicians to select from within the clinical module when they have appointments. They will need to select the template in each clinical field each time they fill in a new record. Alternatively, you can personalise the clinical module. You can assign each clinical field a template depending on user. This means when a user opens a new clinical record the template will automatically load the template assigned to that user for that field.

In maintenance go to the user’s tab:

1. Click on the user you would like to edit. The arrow shows which user you are currently editing.



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

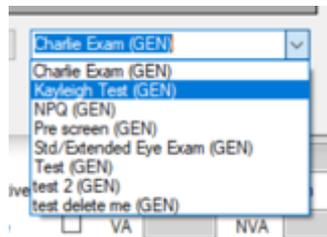


This will open a new window.

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



4. 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.

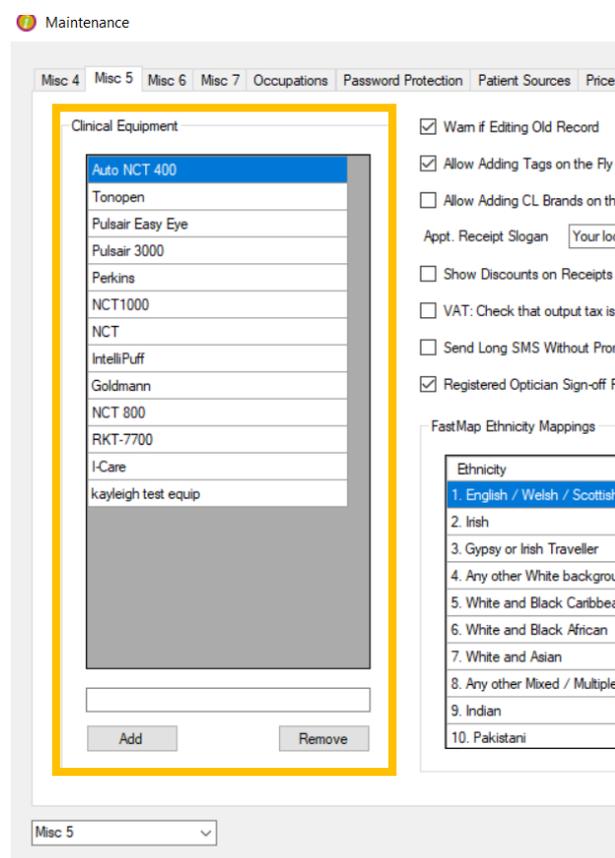


5. Click add

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

In clinical records there are sections, such as the IOP's section, where you may want to record the equipment used to take the measurement. You can select the equipment from the dropdown list, and this equipment can be populated in the Misc. 5 tab on the left-hand side:



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

A screenshot of a form with a text input field at the top. Below the text box are two buttons: 'Add' on the left and 'Remove' on the right.

2. Click add.

A single 'Add' button centered on the screen.

Fast map ethnicity mappings

You will find an extensive list of ethnicities linked to fast map mapping categories, and these can be edited in the Misc. 5 tab:

A screenshot of a software window titled 'FastMap Ethnicity Mappings'. It contains a table with two columns: 'Ethnicity' and 'FastMap Mapping'. The 'FastMap Mapping' column has dropdown menus for each row. A yellow box highlights the dropdown menu for the first row, which is currently open and shows options: 'Caucasian', 'Non categorized', 'African', and 'Asian'. The 'Caucasian' option is selected.

Ethnicity	FastMap Mapping
1. English / Welsh / Scottish / Northern Irish / British	Caucasian
2. Irish	Non categorized
3. Gypsy or Irish Traveller	African
4. Any other White background	Asian
5. White and Black Caribbean	Caucasian
6. White and Black African	Latino
7. White and Asian	African
8. Any other Mixed / Multiple ethnic background	African
9. Indian	Asian
10. Pakistani	Non categorized
	Asian

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 and, if you have your OCT machine connected to i-Clarity, the fast map mapping category will automatically be used by the OCT to set normal values based on the ethnicity selected and the category associated with it in the Misc. 5 tab.

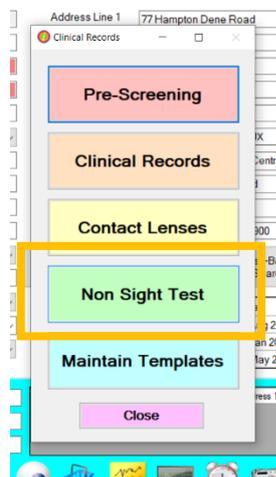
Additional clinical configuration options

Other Exam

You can choose what the other exams are known as by typing in the text box in misc. 6:

A screenshot of a configuration page for 'Misc. 6'. It contains several checkboxes and text boxes. The 'Other Exam Known as' text box is highlighted with a yellow box and contains the text 'Non Sight Test'. Other options include 'Standard Lens SCU Code for All-in Pricing', 'Print Patient Address on Slip', 'Show All Staff Initials', 'Allow Redemption of Gift Vouchers in Different Branch', 'Allow Prescriptions Open with Patients (ADVANCED USERS ONLY)', 'Enforce Adjustment Reasons in Dispensing Module', 'Use Global Patient Folder IDs', and 'Encrypt Account Numbers'.

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



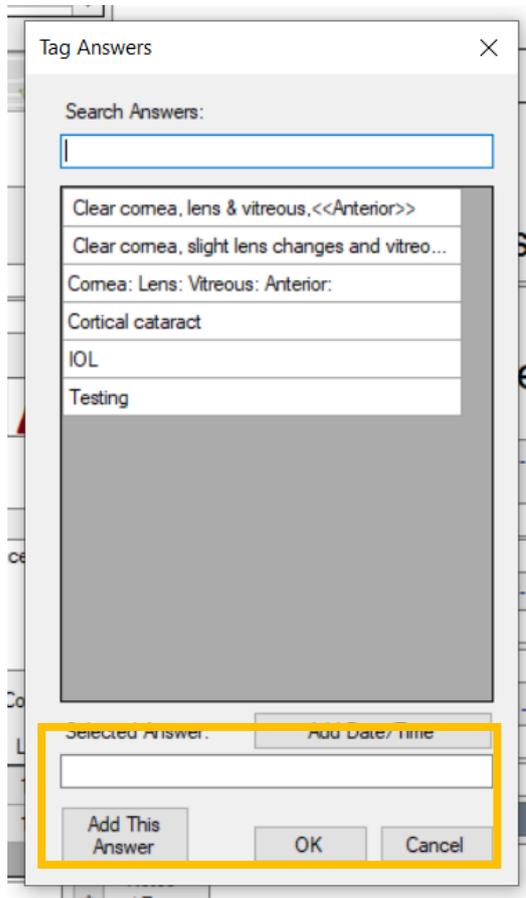
Edit record warning

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.

Warn if Editing Old 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, your clinician can add tag answers to the list from the options box:

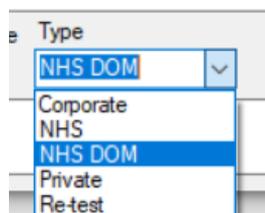


When the list of tag answers comes up, the clinician can add an alternative answers in the free text box at the bottom and click “Add This Answer” and the tag answer will then be available in this tag going forward.

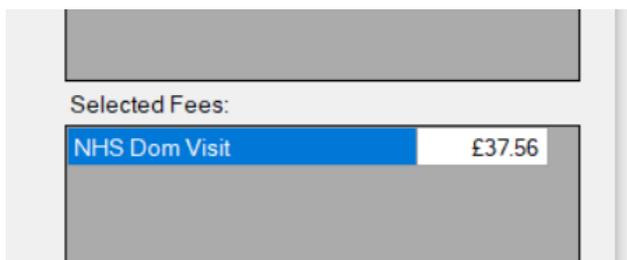
If the box is left unchecked, the clinician cannot add new answers to the list for future use.

Professional Fees

When a clinician has finished their exam, they are required to assign the correct fee for their appointment. You can set defaults depending on what prescription type is selected.



This means that, when the confirmation box appears at the end of a test, the appropriate fee will already be selected.



The clinician will have the option to change this fee if needed.

Navigate to the Misc. 7 tab in the maintenance module.

1. Click in the box next to the prescription type.

Prescription Types

Prescription Type	Use on New Rx	Default Fee
Corporate	<input checked="" type="checkbox"/>	
NHS	<input checked="" type="checkbox"/>	
NHS DOM	<input checked="" type="checkbox"/>	NHS_ST
Private	<input checked="" type="checkbox"/>	PVT_ST
Re-test	<input checked="" type="checkbox"/>	

2. Type in the product code of the fee you would like to set as the default, exactly as it is shown in the system.

Now, when you select the prescription type in the clinical records, this fee will automatically be selected upon exiting the record.