

## Banks

When you are setting up a direct debit for a patient and you enter their bank details, i-Clarity can pull through the bank's address based on the sort code entered. You can populate a list of banks and addresses in the Banks tab in the maintenance module.

Fill in the boxes at the bottom of the page from left to right.

110140	Halifax	Capitol Centre	Queen Street	Cardiff					
110539	Halifax								

Add

1. Type the sort code of the bank in the first box.
2. Type the name of the bank in the next box.
3. The next three boxes are address boxes and the fourth is the post code box.
4. You can add the branch telephone number in the next box.
5. The email address for the bank can go in the final box.

Click add.

## Collection Method

You can set different ways for direct debit / standing order money to be collected. You may offer a third party eyecare plan as well as allowing patients to set up standing orders or collect your own direct debits. You can set a list of different collection types in the collection method tab in the maintenance module. When you set up a mandate for a patient, these options will be available to select in the mandate.

Fill in the information at the bottom of the page.

Type	<input type="text" value="SO"/>	Comments	<input type="text"/>
Bank	<input type="text" value="111111"/>		
Account Number	<input type="text"/>		
Name	<input type="text"/>		
Address Type	<input type="text"/>	Stop Auto Collection	<input type="checkbox"/>
Address	<input type="text"/>	Save Online With FCC	<input type="checkbox"/>
Address Account	<input type="text"/>		
Address Password	<input type="text"/>		

Add

1. Select the collection type of this method. Either Direct Debit or Standing Order. A direct debit is when you are in control of taking money from the patient's bank account. A standing order is when the patient tells their bank to send you money on a monthly basis, you have no control over the payments, it is all down to the patient and their bank.

2. Select your bank from the dropdown list.
3. Put in the account number of the account that will receive the patient's money.

## Communications

### Direct debit / standing order communication

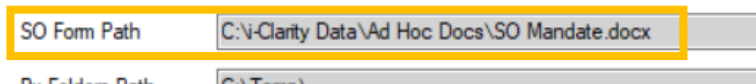
When you set up a direct debit for a patient you can get them to sign an agreement, or the mandate for a direct debit.

### Document set up

You should create a word document containing the information you want to include on your mandate / agreement.

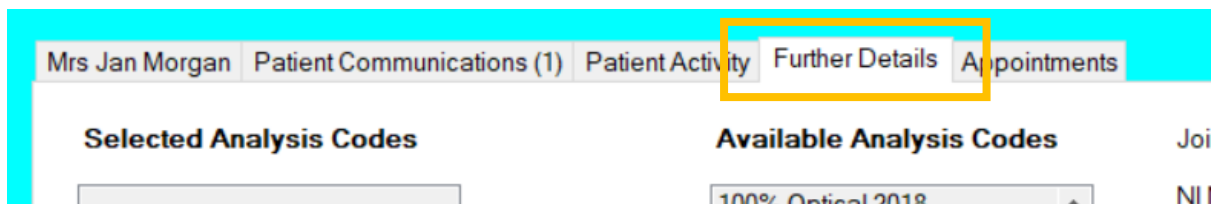
Your letters should be saved in the appropriate folder ready to be attached in the communications tabs.

You can find the folder location in the "Branches" tab:

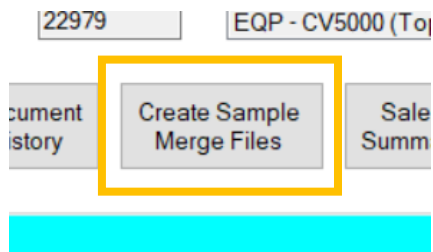


When you have saved your content for each of your direct debit communications in the correct folder, you need to input "placeholders" in order that the patient's details will be mail merged into the document. You need to export a sample mail merge file from i-Clarity to use in your document.

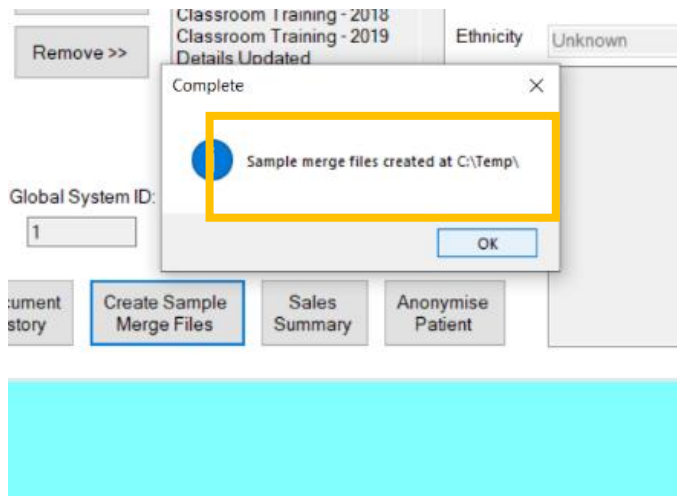
1. Log in to i-Clarity and go to the "further details" tab in patient records.



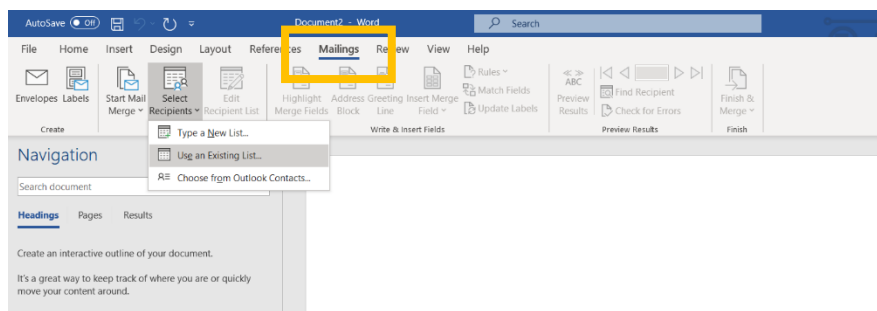
2. Click on the "Create Sample Merge Files" button at the bottom of the page.



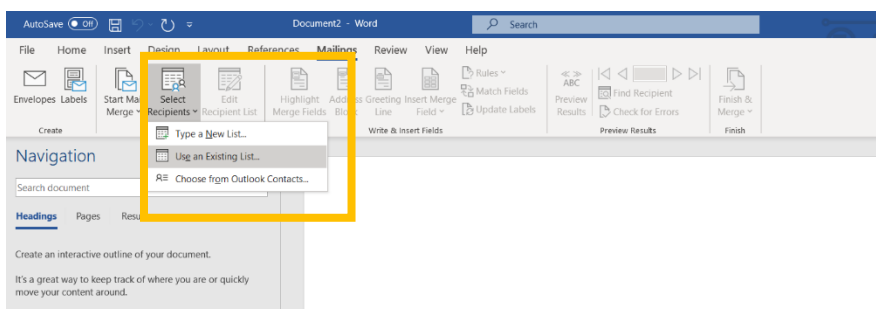
3. Take a note of the file path that the file has saved to from the pop up message



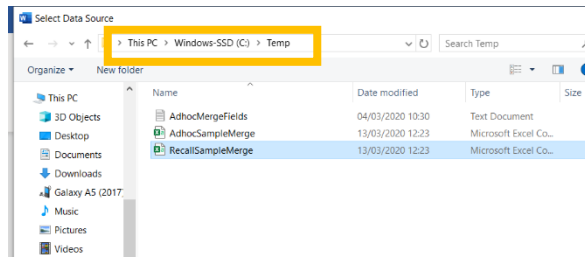
4. Go to your word document that contains your letter, click on “mailings”.



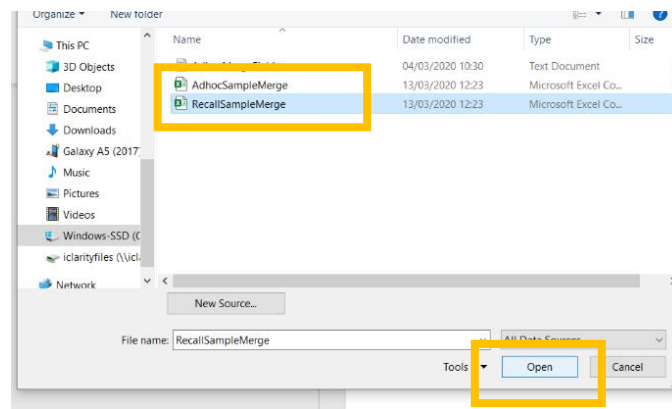
5. Click “select recipients” then “use existing list”



6. Find the file using the file path you noted.

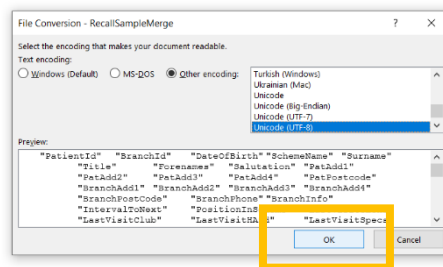


7. Select the AdhocSampleMerge file. Then click open.

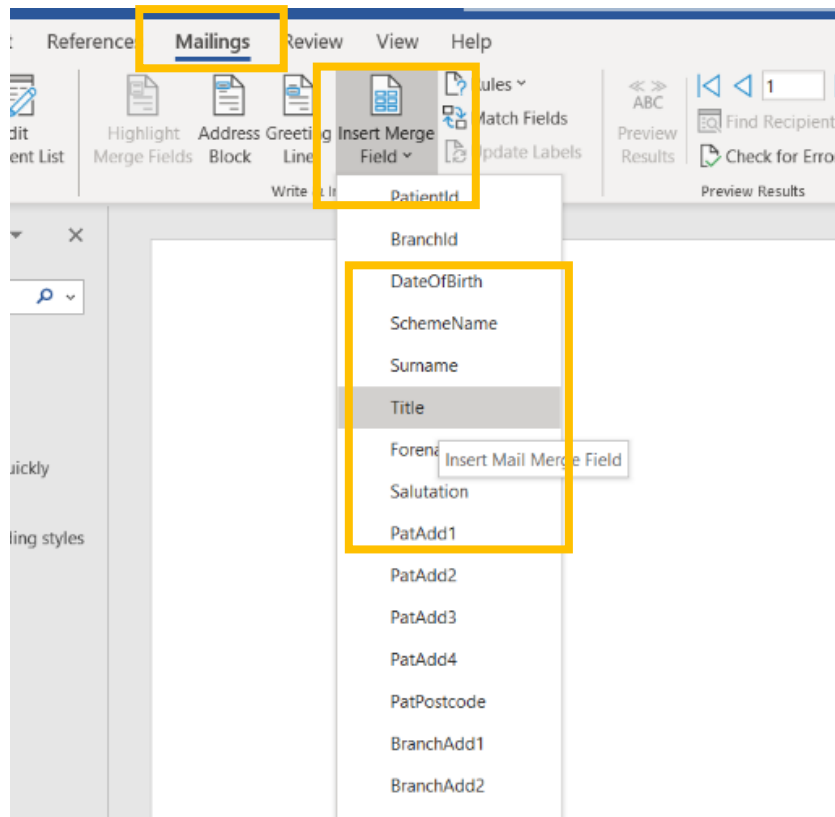


This will open a new window.

8. Click OK



9. In “mailings” go to “insert merge fields” and select the field you want from the list. For a full list of what information each merge field inserts see appendix 3



Once you have inserted all the information you can save your document. If you have not already done so, make sure that the document is in the correct folder, depending on the file path set out in the branches tab.

