# *i*-Clarity

# Patient Communications set up

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# Patient Communication

Before starting this communication section, we recommend that you:

- 1. Decide on all your recall schemes. This is the expiry date of the patient's prescription and when the patient is due for another appointment.
- 2. Decide how many stages each of these recall schemes will have. Stages manage the time intervals of the patient's reminders.
- 3. Decide the order for your preferred communication types. Communications allow you to individualise your reminders to different groups of patients and allows you to assign alternative modes of communication if your preferred communication is not viable.

You should also have any word documents for letters saved and ready.

Your recall 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:

If the word document, you are saving is a recall letter the file location where you need to save the document is the Recall Communications Path:

all Letters\
an Leuers (

If it is any other communication, such as a marketing letter, the file location where you need to save the document is the Adhoc Communications Path:

Adhoc Communications Path	C:\Temp\Ad Hoc Docs\	
Recall Communications Path	C:\Temp\Recall Letters\	
Branches ~		

# Document set up

When you have your content for each of your patient letters saved in the correct folder, as shown on the previous page, 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.

Mrs Jan Morgan	Patient Communications (1)	Patient Activ	ity	Further Details	A	pointments	
Selected An	alysis Codes		Ava	ailable Analysi	s C	odes	Joi
		F	100	% Optical 2018		^	NH

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

Remove >>	Classroo Classroo Details U	m Training - 20 m Training - 20 lodated	18 19 Et	hnicity	Unknown
	Complete	Sample merge file	s created at C:	) Temp\	<
bal System	ID:			ОК	
nent Crea	ate Sample	Sales	Anonymis	se	

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 from step 3.

Select Data Source				
- → × ↑ 🚺 > This I	PC > Windows-SSD (C:) > Temp	v Ü v	earch Temp	
Organize 👻 New folder			j ·	. (
S This PC	Name	Date modified	Туре	Size
3D Objects	AdhocMergeFields	04/03/2020 10:30	Text Document	
Desktop	AdhocSampleMerge	13/03/2020 12:23	Microsoft Excel Co	
Documents	RecallSampleMerge	13/03/2020 12:23	Microsoft Excel Co	
Downloads				
📲 Galaxy A5 (2017)				
Music				
E Pictures				
Videos				

7. Select the merge file you are working on. Either RecallSampleMerge for recall letters or AdhocSampleMerge for ad hoc communication. Then click open.

This PC	Name	Date modified	Туре	Size
3D Objects	2	04/03/2020 10:30	Text Document	
Desktop	AdhocSampleMerge	13/03/2020 12:23	Microsoft Excel Co	
Documents	RecallSampleMerge	13/03/2020 12:23	Microsoft Excel Co	
Downloads				
📲 Galaxy A5 (2017)				
Music				
E Pictures				
Videos				
Uindows-SSD (C				
Uindows-SSD (C				
<ul> <li>Windows-SSD (C</li> <li>clarityfiles (\\icl.</li> <li>Network</li> </ul>	<			1
€ Windows-SSD (C iclarityfiles (\\icl. Network	< New Source			1
Uindows-SSD (C iclarityfiles (\\icl. Network	< New Source e: RecallSampleMerge	<b>v</b>	All Data Sources	

This will open a new window.

8. Click OK

File Conversion DecallCompletion			2	~
Pile Conversion - Recalisamplewie	ige		1	^
Select the encoding that makes your d	ocument readable.			
Text encoding:	-			
○ Windows (Default) ○ MS-DOS	Other encoding:	Turkish (Windows)		~
		Ukrainian (Mac)		
		Unicode (Big-Endian)		
		Unicode (UTF-7)		
		Unicode (UTF-8)		· ·
Preview:				
"PatientId" "BranchI	d" "DateOfBir	th" "SchemeName" "Su	irname"	^
"Pathdd2" "	Patàdd3" "Pa	tadd4" "PatPosto	ode"	
"BranchAdd1" "	BranchAdd2" "Br	anchAdd3" "BranchAd	d4"	
"BranchPostCode	"BranchPho	ne" "BranchInfo"		
"IntervalToNext	" "PositionI	in8		
1 1001 10110000				

9. In "mailings" go to "insert merge fields" and select the field you want from the list.



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.



# Patient recalls

i-Clarity recalls can be separated into three sections: schemes, stages, and communications. The function of the recall schemes is to manage the expiry date of the patient's prescription and when the patient is due for another appointment. Stages manage the time intervals of the patient's reminders. Communications allow you to individualise your reminders to different groups of patients and manage the order of your communication type preferences.

# **Recall Schemes**

Navigate to the Recall Scheme tab in the maintenance module.

Working in the top half of the screen, you need to add each of the schemes that you want available for use, filling in the boxes from left to right.

	Scheme Name		Notes	Months	Expiry	Appt	Scheme Type		Obsolete	1
•	CEC C Lens Weare	r	Cardiff Eyecare Contact Lens Reminder	12	12		CL Visit	$\sim$		
	CL12			15	16		CL Visit	$\sim$		
	CL24		Si Hy 2yr recall	24	24		CL Visit	~		
	CL6			6	12		CL Visit	~		
	OS CL Wearers (E)	(eplan)	OS CL Wearers (Eyeplan)	1	1		CL Visit	~	$\checkmark$	1
	OS CL Wearers (Sa	auflon)	Optic Shop DD patients (Sauflon)	1	1		CL Visit	$\sim$		
	OS CLs 1 Year		Optic Shop CLs 1 Year	12	12		CL Visit	$\sim$		
	CL Trials 1st Time	Wearer	Scheme to track trials wearers	1	0		None	$\sim$		
Add							CL Visit		~	] [
	Sequence No	Days To Send	Communication Stage Name							1
•	1	360	CEC CL Stage1							1

Misc 4 Misc 5 Misc 6 Misc 7 Occupations Password Protection Patient Sources Price Lookup Product Grid Products Promotions Recall Communications Recall Schemes Re

- 1. Insert scheme name E.g. CL 6 months in the first box.
- 2. Add any notes in the next box.
- 3. Add the time before the patient is due to return in months in the next box along.
- 4. Add the expiry of the prescription. So E.g. you may want the patient to return in 6 months for a contact lens check, but the prescription will be valid for supply for 12 months. This will allow the system to supply contact lenses for 12 months even after the patient's 6-month return period.
- 5. If a patient has a recall communication due, but already has an appointment booked in, i-Clarity will not generate the communication. If you would like this recall to generate even if the patient has an appointment booked, you can tick the appointment checkbox. Finally, you need to assign a scheme type. Eye Exam scheme types should be assigned to recalls that need to be available for selection from the spectacle prescription or main Clinical Record form. Contact Lens schemes should be assigned to recalls that need to be available from the CL Rx or Contact Lens Clinical Record. Scheme type other should be used for any recalls you would like to select from the Other/Supplementary Clinical Record (Clinical record users only). Scheme type none should be assigned to recalls that do not fall into any of the above categories. Please note, you can only assign a patient one eye exam, contact lens and other recall but you can assign a patient multiple recalls attached to the scheme type none. CL Rec or Specs Rec should be assigned to recalls that you wish to automatically send to inform patients that their contact lenses or spectacles are ready to collect. Recalls of this scheme type go out automatically when you receive jobs in on the system. Choose the Spec Coll scheme if you are setting up a recall that you want to send to follow up with patients after they have collected their spectacles. Recalls of this scheme type go out automatically a pre-set number of weeks, of your choosing, after you have collected the spectacles off the system.

Click add.

Once you have added your scheme to the list you can add "Stages" to it. Each stage indicates the time interval of when recalls and follow up recalls are sent for each of the schemes.

1. Highlight the scheme you want to add stages to by clicking on the line in the top half of the screen. The arrow indicates which line you are editing.

	Scheme Name		Notes	Months	Expiry	Appt	Scheme Type		Obsolete	
Þ	CEC C Lens Wea	rer	Cardiff Eyecare Contact Lens Reminder	12	12		CL Visit	~		
_	0212			10						4
	CL24		Si Hy 2yr recall	24	24		CL Visit	~		1
	CL6			6	12		CL Visit	~		1
	OS CL Wearers (E	Eyeplan)	OS CL Wearers (Eyeplan)	1	1		CL Visit	~	$\checkmark$	1
	OS CL Wearers (S	Sauflon)	Optic Shop DD patients (Sauflon)	1	1		CL Visit	~		1
	OS CLs 1 Year		Optic Shop CLs 1 Year	12	12		CL Visit	~		1
	CL Trials 1st Tim	e Wearer	Scheme to track trials wearers	1	0		None	~		
Add							CL Visit		~	]
	Sequence No	Days To Send	Communication Stage Name							1
b.	1	360	CEC CL Stage1							1

2. In the bottom half of the screen, fill the boxes in from left to right.

	Scheme Name		Notes	Months	Expiry	Appt	Scheme Type		Obsolete	^
•	CEC C Lens Wear	er	Cardiff Eyecare Contact Lens Reminder	12	12		CL Visit	$\sim$		
	CL12			15	16		CL Visit	~		
	CL24		Si Hy 2yr recall	24	24		CL Visit	$\sim$		
	CL6			6	12		CL Visit	$\sim$		
	OS CL Wearers (E	yeplan)	OS CL Wearers (Eyeplan)	1	1		CL Visit	$\sim$	$\checkmark$	
	OS CL Wearers (S	auflon)	Optic Shop DD patients (Sauflon)	1	1		CL Visit	$\sim$		
	OS CLs 1 Year		Optic Shop CLs 1 Year	12	12		CL Visit	$\sim$		
	CL Trials 1st Time	e Wearer	Scheme to track trials wearers	1	0	$\checkmark$	None	$\sim$		
Add							CL Visit		~	] [
	Sequence No	Days To Send	Communication Stage Name							
•	1	360	CEC CL Stage1							1
Add		]								
Add								T Be	ransfer Patien tween Schen	ts

- 3. Insert the sequence number, E.g. 1 for the first time you want the patient to be contacted, into the first box.
- 4. In the next box type how many days between communications. Sequence number 1 should be how many days after the appointment you want the communication to be sent, all further sequences should be how many days after the previous communication was sent.

5. Communication stage name will be pulled through to the "Recall Communication" tab and so needs to be explanatory, E.g. Scheme Name + Stage number

	Add	1	360		12 Months Stage 1
--	-----	---	-----	--	-------------------

6. Click add.

#### Arrival resets recall

If you do not use the clinical module, you can set the system to reset the patient's recall when they are marked on the system as arrived for their appointment.

In the Branches tab in the maintenance module, check the box named "Arrival resets recall":



Now, when you mark a patient as arrived, their recall will reset.

#### **Recall Communications**

The communication defines the content of the recall the patient receives and how they receive the recall. It also allows you to breakdown each communication stage into age groups so that you can send different content to each group in different ways.

In the maintenance module, go to the Recall Communications tab.

1. Select the recall scheme you want to add communications to, from the dropdown list.

Filter by Recall Scheme:

12 months

2. Fill in the boxes in the first column

Filter by: Communication Stage Communication Name Maximum Age Preference Order Content	12 months Stage 1 ~	]	Notes Email Subject Marketing Communication Type
Add	Filter by Recall Scheme:	12 mo	nths
Recall Communications 🗸			

a. Select the Stage you want to add communications to from the dropdown list

Filter by:			
	Communication Stage	12 months Stage 1	$\sim$
	Communication Name	12 month Stage 5 12 months Stage 1	
	Maximum Age	12 months Stage 2 12 months Stage 3 12 months Stage 4	
	Preference Order		_

b. Enter the name of the communication in the next box down. We recommend
"Scheme name, stage number, age, communication type" E.g. 3-month, stage
1, U16, Email. To make attaching content easier later.

	Communication Name		
C.	If you want to divide the stag maximum age of the group i	ge into different age groups, you can put n this next box down.	the
		L	



d. When sending recall letters i-Clarity will always send by your chosen mode of communication. Because your chosen mode of communication may not be suitable for all of your patients, E.g. if you choose email and not all of your patients have an email address, you can choose multiple types of communication and order them by preference. i-Clarity will look to see if a recall can be sent by the type marked as preference 1, if that type of communication is

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not available for a patient i-Clarity will look to see if the recall can be sent by the type marked as preference 2 and so on. <u>Please note</u> Please make sure that each stage includes a letter or telephone communication. If you only have email and/or SMS set up and a patient doesn't have an email address or mobile telephone number they will NOT receive a recall, nor will they be moved to the next stage of communications and so their recall will be lost.

- e. The contents box depends on the communication type. This is explained in more detail further down the document. The content can be added in after the communication has been added.
- 3. Move across to the second column of information to fill in.

Notes	
Email Subject	
Marketing	
Communication Type	DocMail ~
Cymraeg	$\sim$
a. Add any notes to the	top box.
Notes Email Subject	

b. You can type the email subject in the next box down, if your communication is to be an email.

Email Subject	
Marketing	

c. If this communication is not expected to generate appointment bookings, you can tick this marketing box. This stops the communication being included in the recall response report. E.g. If you are setting up a specs collected recall.

Marketing	

d. Select the communication type from the dropdown list.

Communication Type	DocMail	~

- i. Choose "Email" if you are using i-Clarity email services.
- ii. Choose "Export" if you are using a mailing/email/text service outside of i-Clarity and you need a list of patient communication details.
- iii. Choose "Letter" if you print the letters in practice or are using the i-Clarity mailing service.
- iv. Choose "Phone" if you want to make a phone call. The recalls assigned as phone will appear in your task list as a task.
- v. Choose "SMS" if you are using the i-Clarity SMS service.
- 4. Click add.

#### Adding content

Once your communication has been added you can add the content.

If you have added lots of communications, you can filter the lists to make the lists more manageable.

1. You can first select the recall scheme you would like to work on

Filter by Recall Scheme: 12 months ~

2. And filter by stage number, age, and communication preference by checking the box the filter you would like to use and selecting from the dropdown list or typing in the box

Filter by:		
	Communication Stage	12 months Stage 1 V
	Communication Name	
	Maximum Age	15
	<sup>p</sup> reference Order	1

E.g. you may choose to update all 12 months recall scheme communications that are preference 1, then move on to the preference 2. This will keep your lists very short and avoid confusion.

To add your content double click on the empty contents box of the communication you are

	Communication Stage	Communication Name	Max Age	Pref. Order	Content	Notes
	12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh e	15	1	HTML PUBLIC "-//</th <th></th>	
•	12 Cymraeg Stage 1	12 Cymraeg Stage 1 U16 Letter	15	1		
	12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh.d	15	2	CYM Specs 12 Month S1 Child.d	
	12 Cymraeg Stage 1	Specs_12_Month_Welsh.docx	59	1	Specs_12_Month_Welsh.docx	
	12 Cymraeg Stage 1	Specs_12_Month_SC_Welsh.docx	110	1	Specs 12 Month SC Welsh docx	
	12 Cymraeg Stage 2	Specs_Child_W_2m later-rem.docx	15	1	Specs_Child_W_2m later-rem.docx	
	12 Cymraeg Stage 2	Specs_W_2m later.rem.docx.docx	59	1	Specs_W_2m later-rem.docx	
	12 Cymraeg Stage 2	Specs_SC_W_2m later.docx	110	1	Specs_SC_W_2m later.docx	
	12 Cymraeg Stage 3	Specs_Child_W_general-rem.docx	15	1	Specs_Child_W_general-rem.docx	
	12 Cymraeg Stage 3	Specs_W_general-rem.docx	59	1	Specs_W_general-rem.docx	

This will open a different window depending on what communication type is selected.

# Email

If your communication type is an email the following window will open:





idit Email	×	You can add links to your email by
Email Subject	Edit Raw HTML Add Merge Field	clicking on "insert" then "link". This w
Email Body		open a new window.
B J U ≡ ≡ ≡ Font Color Background Inset - Lini Ima		
	Ē	
Save Cancel	Add Merge Field Add Animation	

Edit Email		× _
m Email Subject	Edit Raw HTML Add Merge Field Use the blank m for a single line	merge field
$\mathbf{B}$ $I \ \underline{\cup} \equiv \equiv \equiv$ Font Color Background Insert -		
in i	((BranchAdd1)) ((BranchAdd2)) ((BranchAdd3)) ((BranchAdd3)) ((BranchAmail) ((BranchPax)) ((BranchD)) ((BranchD)) ((BranchPostC ((CLExpiryDate ((DateOBirth)) ((ErailAddres: ((Forenames)) ((Gender)) ((GorNo)) ((HomeTel))	)) )) )) )) e)) () () () () () () () () ()
24		You can add merge fields to the body of your email by clicking on this add merge field button and dragging the appropriate field across to the main body of the email.

# <u>SMS</u>

If the communication type is an SMS, the following window will open:



#### Phone

If the communication type is phone you can type directly into the contents box.



# <u>Letter</u>

Type the file name of the document, including the file extension, directly into the contents box. You can find the file name by following these steps:

Open the file location but do not open the document.

File Home Share View		
$\leftarrow \rightarrow \lor \uparrow  $ > Test	✓ Õ Search	Test
^ Name	^ Date m	Pight click on the
Quick access	20/02/5	
Desktop 🖈 🔄 Test Recall	View >	document and
🖶 Downloads 🖈	Sort by	
Documents *	Group by	coloct proportios
Network Pictures 🖈	Refresh	select properties.
📜 Kayleigh F 🖈	Customise this folder Selec	
Kayleigh		
Maths	Paste	
Poppy School	Paste shortcut	
Reading	Undo Rename Ctrl+Z	
Reading	Give access to	
<ul> <li>OneDrive</li> <li></li> </ul>	Nau	
1 item	/	
	Properties	

	✓ O Search Tes	st
ie D	ate m	
Test Recall 3	0/03/2	
Test Recall Properties	e name	The file name is made up of the name and the file extension. This example would be Test Recall.docx
Opens with: Word	File extension	ion
Location: C:\Users\kayle\Desktop	\Test	
Size: 11.4 KB (11.715 bytes)		
Size on disk: 12.0 KB (12,288 bytes)		

# Ad Hoc Comms

This is where you can set up any kind of communication other than a recall. You will need to create a sample merge file to set up your documents with the correct merge fields. Please go to <u>document set up</u> for instructions on how to do this.

Once you have set up any word documents you need you can add them to i-Clarity in the Ad Hoc Comms tab.

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

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	Avery 21 Labers	Avery 21 Labels.docx					Letter	~	All branches	~
	Bupa Old Format	BUPA Old Format.doc				$\checkmark$	Letter	~	All Branches	$\sim$
	Bupa Referral	BUPA.docx				$\checkmark$	Letter	~	All Branches	$\sim$
	Bupa report CEC	BUPA.doc					Letter	~	All Branches	$\sim$
	CL Card	CL Card.doc			$\checkmark$		Letter	~	All Branches	$\sim$
	CL expired letter.	CL expired letter.doc					Letter	~	All Branches	$\sim$
	CL front cover CEC	CL Rx Front Page.docx			$\checkmark$		Letter	~	All Branches	$\sim$
	CL Px Due Lenses a	CL Wearers Due Lense					Letter	~	All Branches	~
	CL Px Due Lenses C	CL Wearers Due Lense					Letter	~	All Branches	~
Add							DocMail		<ul> <li>All Branches</li> </ul>	~
Add	nate Merrie Fielde Text Fi	de la					DocMail		<ul> <li>✓ All Branches</li> </ul>	~
Add	este Marse Balde Tevt Fi	ža					DocMail		✓ All Branches	~
Add Ca oc Comr	nata Marra Fields Taut Fi	3m					DocMail		V All Branches	
Add Co oc Comm	nste Merre Fielde Test Fi	34					DocMail		V All Branches	Clos

- 1) Type communication name in the first box.
- 2) The next box is the contents box. The contents box depends on the communication type. This is explained in more detail further down the document. The content can be added in after the communication has been added.
- 3) Select the tick box for where you would like to communication to be accessible from.
   <u>Mktg</u> This will allow the document to be sent from the Marketing module.
   <u>Px</u> This will make the document available records.

**<u>Rx</u>** This will make the documents available from the prescription module

<u>CL</u> This will make the documents available from the contact lens module

 Choose what you would like to happen when a word document is generated. <u>Print</u> If this box is ticked, when you open the document, it will automatically send to print. This is useful for things such as GOS forms.

<u>Save</u> This will trigger the document to automatically save to patient files. If it is something that needs to be edited, such as a Dr referral letter, it can be opened and re-saved from within i-Clarity

If you do not select either of these options, the word document will open and merge the patient details and you can choose what to do with it from there.

5) Select the communication type from the dropdown list.

Choose "Email" if you are using i-Clarity email services.

Choose "Export" if you are using a mailing/email/text service outside of i-Clarity and you need a list of patient communication details.

Choose "Letter" if you print the letters in practice or are using the i-Clarity mailing service.

Choose "Phone" if you want to make a phone call. The recalls assigned as phone will appear in your task list as a task.

Choose "SMS" if you are using the i-Clarity SMS service.

- 6) If the communication is specific to one branch you can select that branch from the dropdown list.
- 7) Click add.

You can now add your communication content.

Once your communication has been added you can add the content.

If you have added lots of communications, you can filter the lists to make the lists more manageable.

1. You can first select the recall scheme you would like to work on

Filter by Recall Scheme: 12 months ~

2. And filter by stage number, age, and communication preference by checking the box the filter you would like to use and selecting from the dropdown list or typing in the box

Filter by:		
	Communication Stage	12 months Stage 1 $\sim$
	Communication Name	
	Maximum Age	15
	Preference Order	1

E.g. you may choose to update all 12 months recall scheme communications that are preference 1, then move on to the preference 2. This will keep your lists very short and avoid confusion.

To add your content double click on the empty contents box of the communication you are editing.

	Communication Stage	Communication Name	Max Age	Pref. Order	0.1.1	Notes .
	12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh e	15	1	HTML PUBLIC "-//</td <td></td>	
•	12 Cymraeg Stage 1	12 Cymraeg Stage 1 U16 Letter	15	1		
	12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh.d	15	2	CYM Specs 12 Month S1 Child.d	
	12 Cymraeg Stage 1	Specs_12_Month_Welsh.docx	59	1	Specs_12_Month_Welsh.docx	
	12 Cymraeg Stage 1	Specs_12_Month_SC_Welsh.docx	110	1	Specs_12_Month_SC_Welsh.docx	
	12 Cymraeg Stage 2	Specs_Child_W_2m later-rem.docx	15	1	Specs_Child_W_2m later-rem.docx	
	12 Cymraeg Stage 2	Specs_W_2m later.rem.docx.docx	59	1	Specs_W_2m later-rem.docx	
	12 Cymraeg Stage 2	Specs_SC_W_2m later.docx	110	1	Specs_SC_W_2m later.docx	
	12 Cymraeg Stage 3	Specs_Child_W_general-rem.docx	15	1	Specs_Child_W_general-rem.docx	
	12 Cymraeg Stage 3	Specs_W_general-rem.docx	59	1	Specs_W_general-rem.docx	

This will open a different window depending on what communication type is selected.

# <u>Email</u>

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If your communication type is an email the following window will open:





If you want to add personal information in the subject line you can add merge fields by clicking on the "Add Merge Field" button next to the subject line and double click on the required merge field.

Please note: this merge field button only works for the subject line. To insert merge fields in the body of the text use the "Add Merge Feld" button at the bottom of the window.



# <u>SMS</u>

If the communication type is an SMS, the following window will open:





# <u>Phone</u>

If the communication type is phone you can type directly into the contents box.



#### <u>Letter</u>

Type the file name of the document, including the file extension, directly into the contents box. You can find the file name by following these steps:

Open the file location but do not open the document.





# Automatic messages

You can set the system to automatically send appointment confirmations and reminders.

# Appointment Confirmations

In the Branches tab:

1) Click on the Appointment Confirmations button.



This will open a new window.

2) Double click in either the email or SMS box to edit the message content.

halysis Types	Ap	pointment T	YP Appointm	ent Confirmations	ction Methods (
xport Path Templates P	ath	c:\Temp\ C:\Temp\	Exp Branch:	Bristol Eyecare	Contingency Data
Downloads P	ath	C:\temp\	Email	Regards <p><font size=2 face="Microsoft Sans Serif"&gt;&lt;<branchname>&gt; Tel:</branchname></font </p>	Payment Details
Location Path	C:\	i-Clarity Dat	aV	< <branchtel>&gt;Y&gt;</branchtel>	Email Receipt
rs Path	C:\	Temp\	SMS	Optician Appointment You have a < <appointment type="">&gt; appointment at &lt;<branchname>&gt; on</branchname></appointment>	Appointment Confirmations
Vorkshop Usemame	Brit	stol Eyecare sinessMeas	ure	< <appointmentdate>&gt; &lt;<appointmenttime>&gt; with &lt;<staffname>&gt; Tel:</staffname></appointmenttime></appointmentdate>	rk. Appointments screen refresh
Password	aci	b123	Ap	pointment Type Specific Confirmations	(seconds) - Zero to turn off
nainte	0	(F	inte	Save Cancel	0

This will open a new window

3) Depending on which communication box you click on a different window will open:

# <u>Email</u>





If you want to add personal information in the subject line you can add merge fields by clicking on the "Add Merge Field" button next to the subject line and double click on the required merge field.

Please note: this merge field button only works for the subject line. To insert merge fields in the body of the text use the "Add Merge Feld" button at the bottom of the window.



# <u>SMS</u>

If the communication type is an SMS, the following window will open:



Please note: There is also an appointment confirmations button in the "Appointment Types" tab. This will update the appointment confirmation communication for the branch you are logged in to only.

#### Appointment specific confirmations

You can create different messages for different appointment types, E.g. you may want to include a reminder to wear contact lens' for an aftercare appointment.

1) In the branches tab click on the Appointment Confirmations button.



This will open a new window.

2) Click on the Appointment Type Specific Confirmations button.



This will open a new window.

3) Select the appointment type from the dropdown list.



4) Select the communication type from the dropdown list.



- 5) Click add
- 6) Once the communication has been added to the list, double click in the content box to open the communication window.

	Appointment Type	Туре	Content
•	CL Checkup	SMS	Please remember to wear your contact lenses
	Sight Test Adult	SMS	

This will open a new window depending on which communication type you have selected.

#### **Reminders**

You can set appointment reminders in the maintenance module in the Misc. 2 tab.

Send SMS appointment reminders	days in advance
Enter reminder text below:	Select Merge Field
Hi, just a reminder you have an appt bo < <appointmenttime>&gt;. Please call &lt;&lt;</appointmenttime>	ooked tomorrow at BranchPhone>> if you

1) Check the "send SMS appointment reminders" box

Send	SMS	appointment reminders	
- 1	-		

2) Enter the number of days before the appointment you would like the reminder to be sent.

	days in advance
--	-----------------

3) Type your reminder message in the box. This will already have a generic message entered.



4) You can add merge fields by clicking on "Select Merge Field" button and selecting from the options.

Select Merge Field

If you are sending out automatic text message reminders, we recommend that you set a time to stop text messages going out at unsociable hours.

Don't send automatic SMS reminders before this time:	08:00	

Alternatively, if you would like to send manual appointment reminders you can check the "Use Manual Reminders" box instead. The message will then only be sent when someone in the practice triggers them.



# Additional communication configuration options SMS from

In the Branch tab there is a text box for you to type in what name you would like to appear as the sender on your SMS messages.

Appts Detail	Standard Mode
SMS From	Radyr EyeC
NHS Form Path	C:N-Clanty Data VAd Hoc Do
Rx Form Path	

# Email footer

You can add an email footer in each branch tab that will be added to the bottom of all emails sent through i-Clarity:

- 1) Double click on the text box
  - Email Footer <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Tran

This will open a new window

2) Type your email footer in the window.

Edit Email		×
PLEASE NOTE: U	K law requires private and public limited companies to include their Registration Address and VAT Number (if any) in any email footer.	
Email Body		
B <u>I</u> <u>U</u> ≡ ≡	a ≡ Font Color Background Insert -	l.
<b>i-Clarity Eyeca</b> 14 Station Road, 1 029 2084 2255	<b>re</b> Radyr, Cardiff, CF15 8AA	^
If you would like to am error, please contact	iend the way we communicate with you, or you believe you have received this email in the practice either by replying to this email or by the telephone number above.	
This email and any file or entity to whom the only for the individual not disseminate, distr	is transmitted with it are confidential and intended solely for the use of the individual y are addressed. This message may contain confidential information and is intended named. If you are not the named addressee (or parent/guardian of same) you should ribute or copy this e-mail.	
i-Clarity Eyecare is a c	ompany registered in England and Wales with company number 123456789.	
		~
Save Canc	el	

3) Click Save

#### Automatically delay multiple recalls

In Misc. tab there is a check box that will stop patients receiving multiple recalls. If you check this box, when a patient is due for a contact lens check and eye exam on the same day the contact lens recall letter will be delayed until the next recall run. This is to prevent the patient receiving two separate letters on the same day.



# Send long SMS without prompting

There is a character limit of 160 per SMS message. If you go over this character count, there will be additional charges.

In the Misc. 5 tab there is a "send long SMS without prompting" checkbox. If this checkbox is not checked, when sending mass communications such as recalls or marketing, the communications will fail to send if the SMS messages are over 160 characters.

If the box is checked, then the communications will send, even if the character limit has been exceeded, but you will be charged for additional messages.

Send Long SMS Without Prompting - PLEASE NOTE: THIS MAY INCUR ADDITIONAL COSTS
Z Desistand Optician Sign off Dequired for Under 16a

### SMS path

If you are using an external SMS messaging service, not provided by i-Clarity, you can put your SMS Exe Path in the Misc 6. Tab.

	1				1
SMS Exe Path					
		 • •	-	-	