



Patient Communications set up

i-Clarity Version 3.2.9

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Patient Communication

Before starting this communication section, we recommend that you:

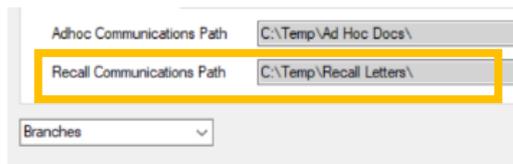
1. Decide on all your recall schemes. This is the expiry date of the patient's prescription and when the patient is due for another appointment.
2. Decide how many stages each of these recall schemes will have. Stages manage the time intervals of the patient's reminders.
3. Decide the order for your 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.

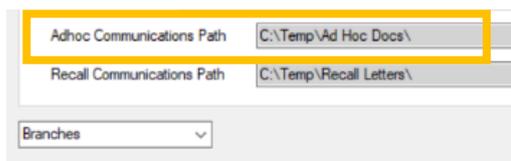
Your recall letters should be saved in the appropriate folder ready to be attached in the communications tabs.

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:



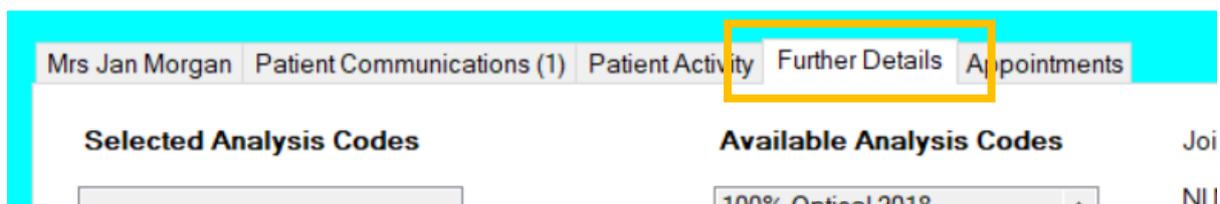
If it is any other communication, such as a marketing letter, the file location where you need to save the document is the Adhoc Communications Path:



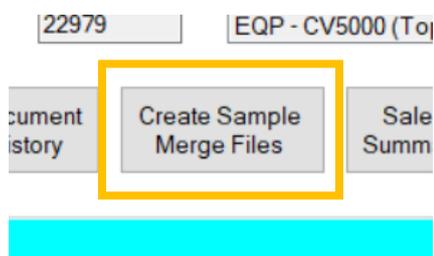
Document set up

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.

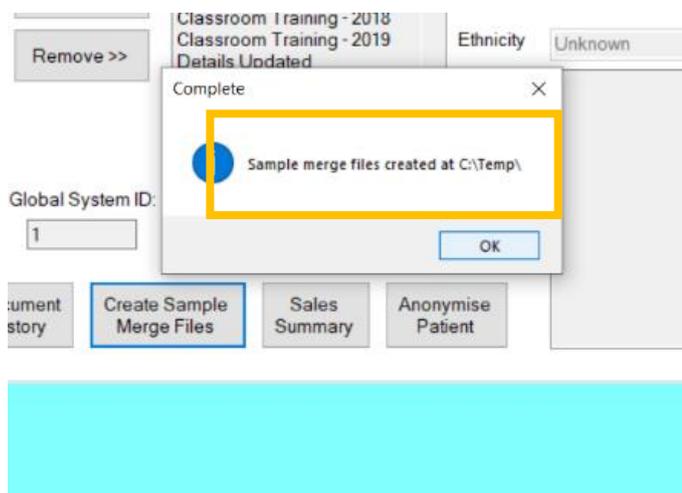
1. Log in to i-Clarity and go to the “further details” tab in patient records.



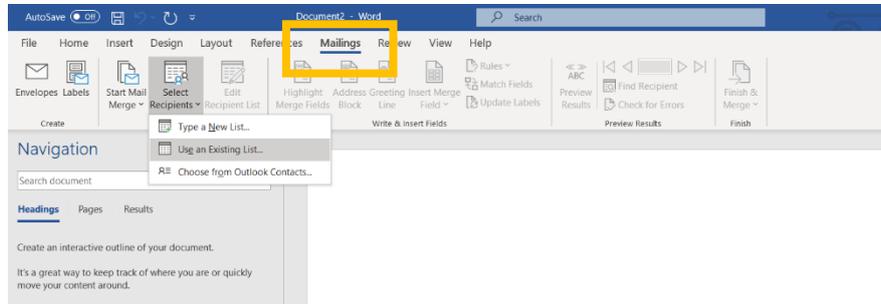
2. Click on the “Create Sample Merge Files” button at the bottom of the page.



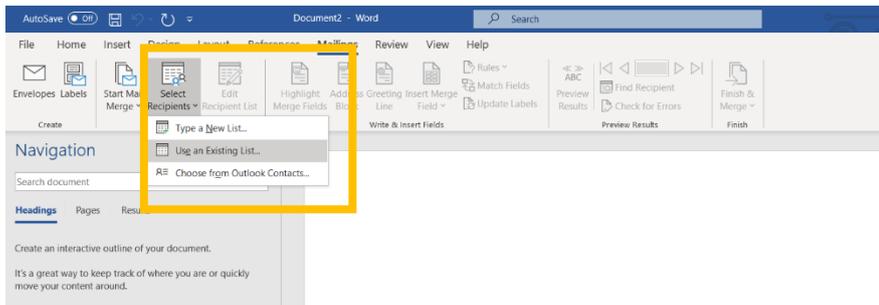
3. Take a note of the file path that the file has saved to from the pop-up message



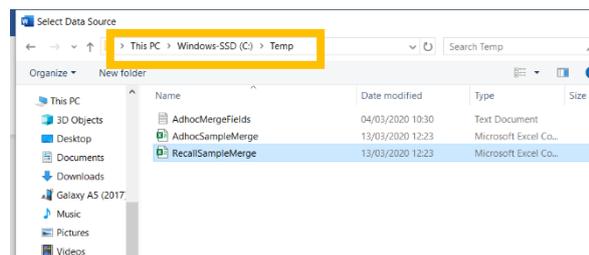
- Go to your word document that contains your letter, click on “mailings”.



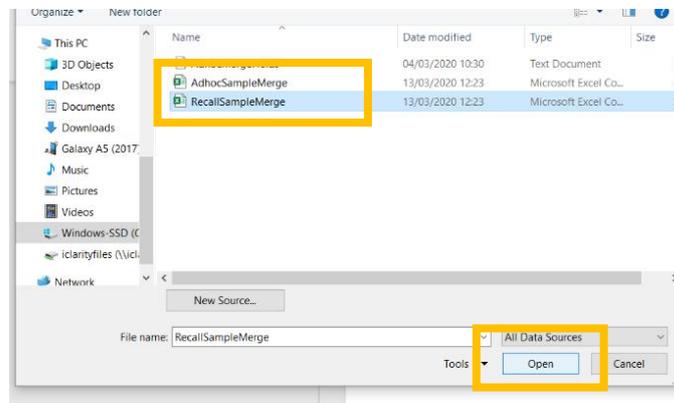
- Click “select recipients” then “use existing list”



- Find the file using the file path you noted from step 3.

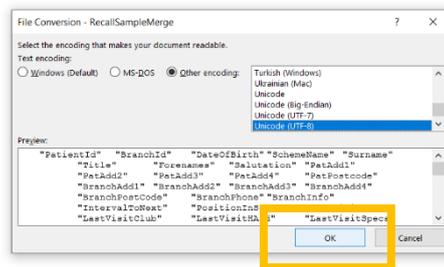
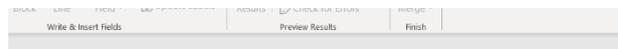


7. Select the merge file you are working on. Either RecallSampleMerge for recall letters or AdhocSampleMerge for ad hoc communication. Then click open.

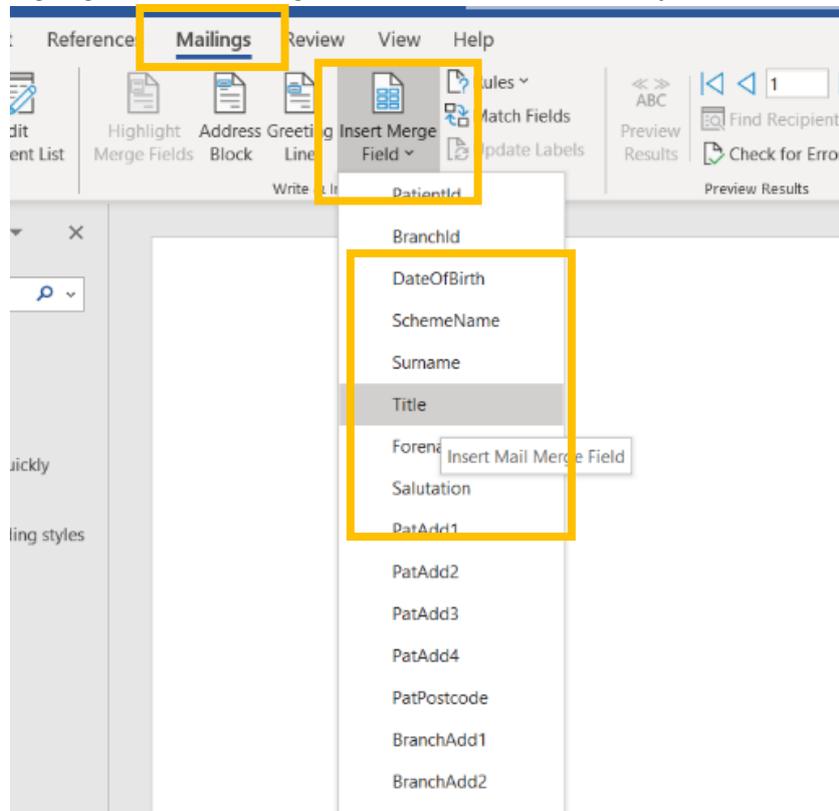


This will open a new window.

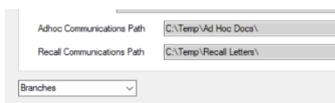
8. Click OK



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



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
CEC C Lens Wearer	Cardiff Eyecare Contact Lens Reminder	12	12	<input type="checkbox"/>	CL Visit	<input type="checkbox"/>
CL12		15	16	<input type="checkbox"/>	CL Visit	<input type="checkbox"/>
CL24	Si Hy 2yr recall	24	24	<input type="checkbox"/>	CL Visit	<input type="checkbox"/>
CL6		6	12	<input type="checkbox"/>	CL Visit	<input type="checkbox"/>
OS CL Wearers (Eyeplan)	OS CL Wearers (Eyeplan)	1	1	<input type="checkbox"/>	CL Visit	<input checked="" type="checkbox"/>
OS CL Wearers (Sauflon)	Optic Shop DD patients (Sauflon)	1	1	<input type="checkbox"/>	CL Visit	<input type="checkbox"/>
OS CLs 1 Year	Optic Shop CLs 1 Year	12	12	<input type="checkbox"/>	CL Visit	<input type="checkbox"/>
CL Trials 1st Time Wearer	Scheme to track trials wearers	1	0	<input checked="" type="checkbox"/>	None	<input type="checkbox"/>

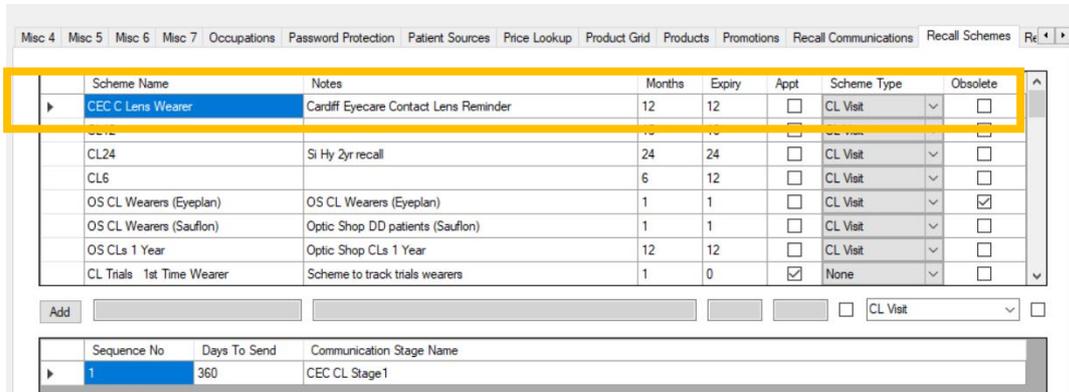
Sequence No	Days To Send	Communication Stage Name
1	360	CEC CL Stage1

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.

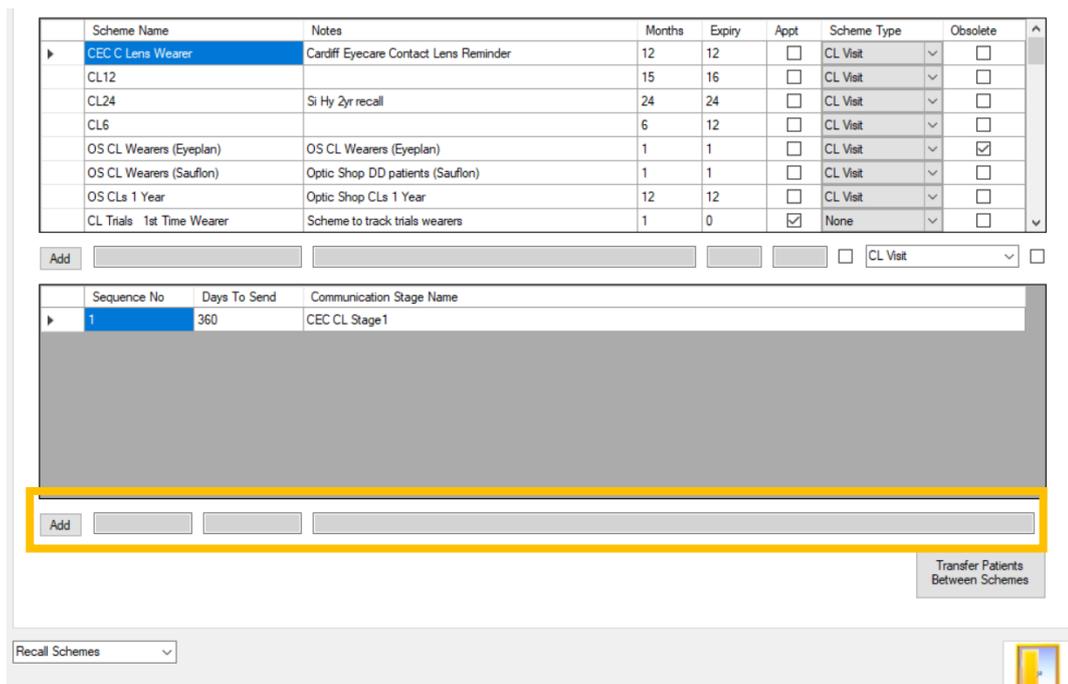
Click add.

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.



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



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
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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”:

<input checked="" type="checkbox"/> Arrival resets recall
<input type="checkbox"/> Test branch

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:

2. Fill in the boxes in the first column

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

- 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.

- c. If you want to divide the stage into different age groups, you can put the maximum age of the group in this next box down.

- 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

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. **Please note** 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	<input type="text"/>
Email Subject	<input type="text"/>
Marketing	<input type="checkbox"/>
Communication Type	<input type="text" value="DocMail"/>

<input type="text" value="Cymraeg"/>

- a. Add any notes to the top box.

Notes	<input type="text"/>
Email Subject	<input type="text"/>

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

<input type="text"/>	
Email Subject	<input type="text"/>
Marketing	<input type="checkbox"/>

- 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

- 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:

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
- Communication Name
- Maximum Age
- Preference Order

12 months Stage 1

15

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.

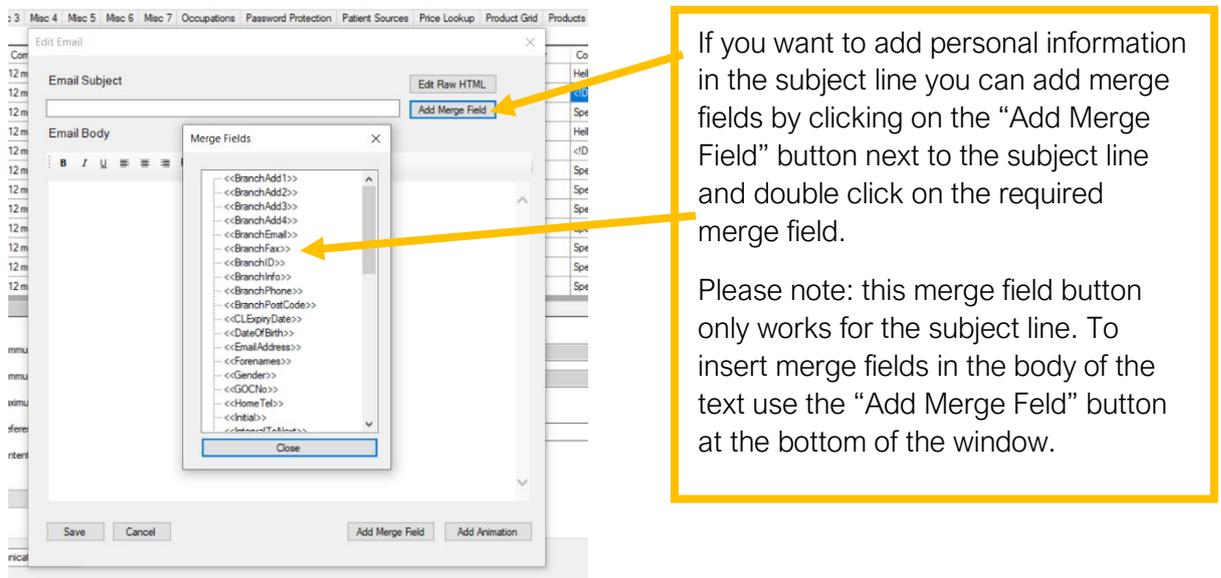
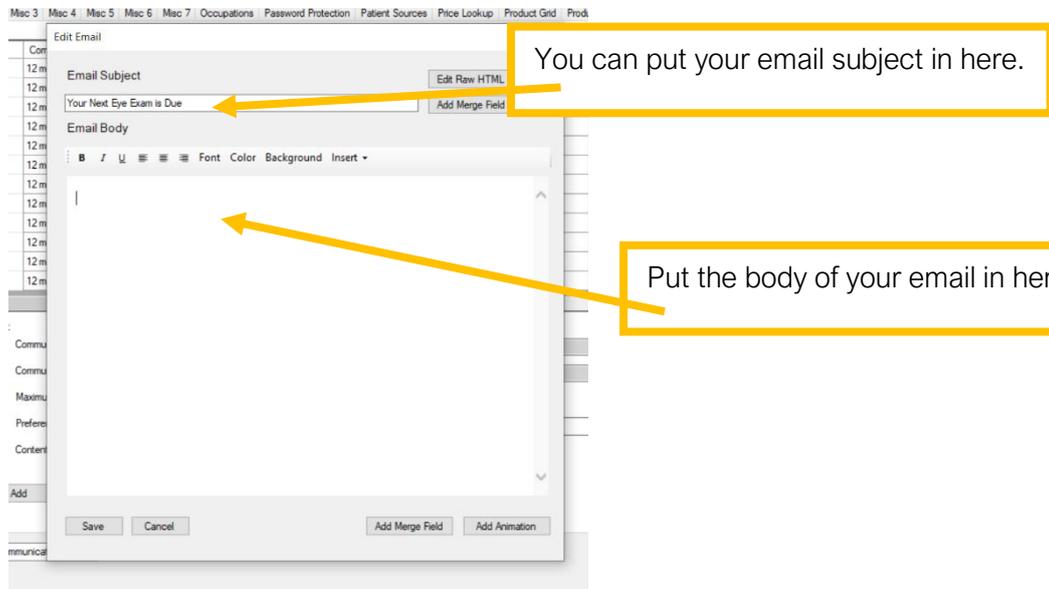
To add your content double click on the empty contents box of the communication you are editing

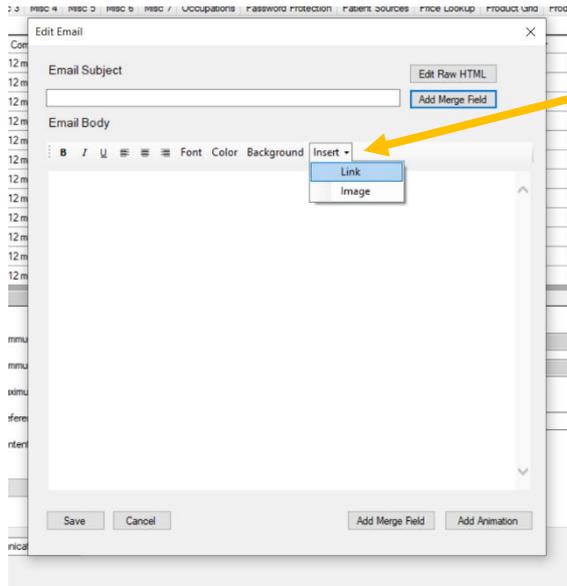
Communication Stage	Communication Name	Max Age	Pref. Order	Content	Notes
12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh e...	15	1	<!DOCTYPE HTML PUBLIC "-//...	
12 Cymraeg Stage 1	12 Cymraeg Stage 1 U16 Letter	15	1		
12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh.d...	15	2	CYM Specs 12 Month S1 Child.d...	
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.

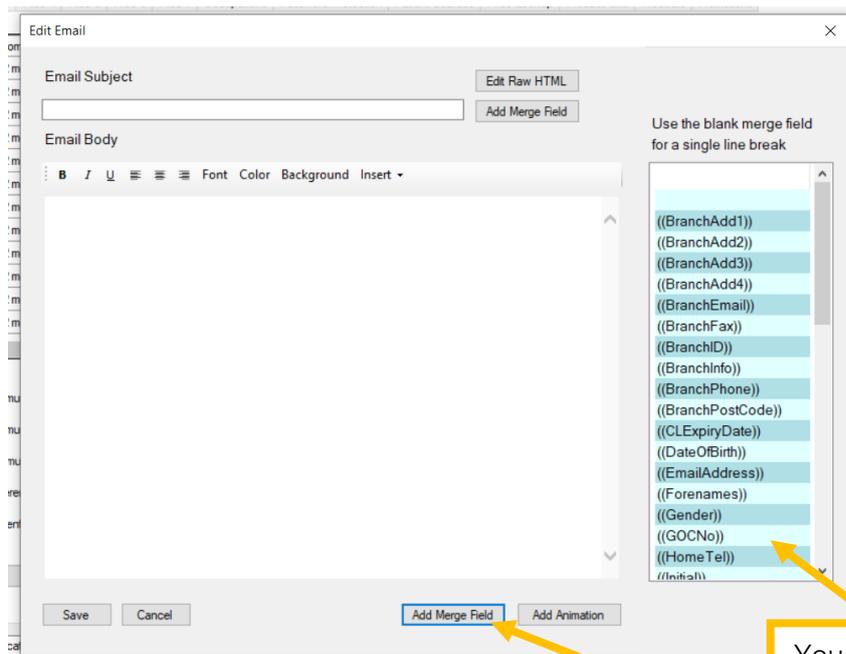
Email

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





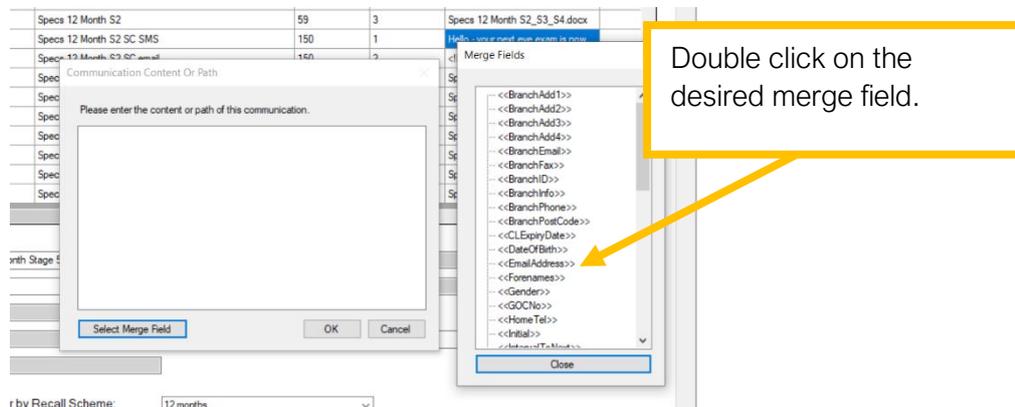
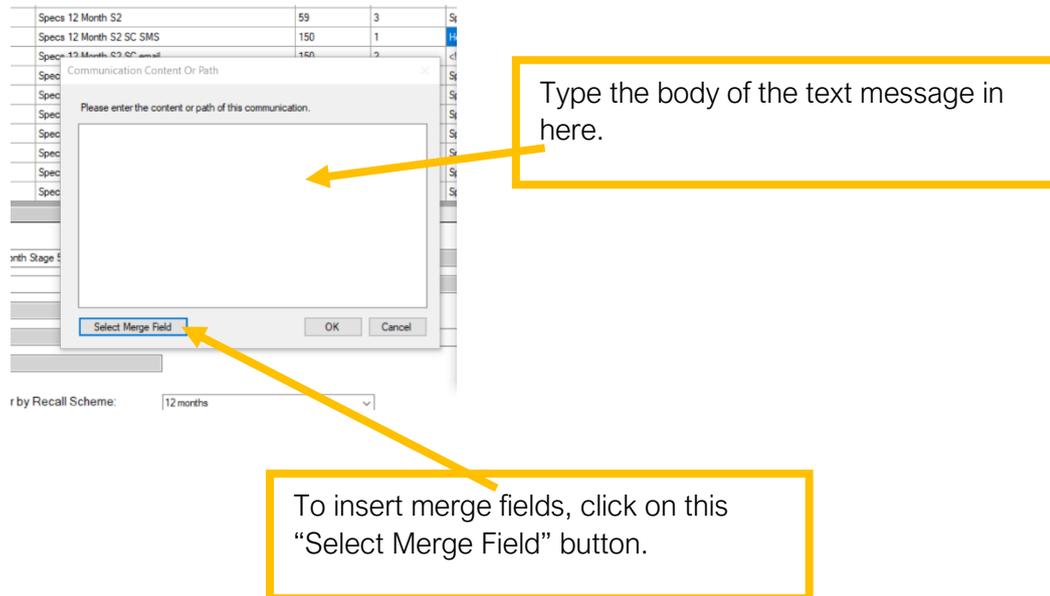
You can add links to your email by clicking on "insert" then "link". This will open a new window.



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.

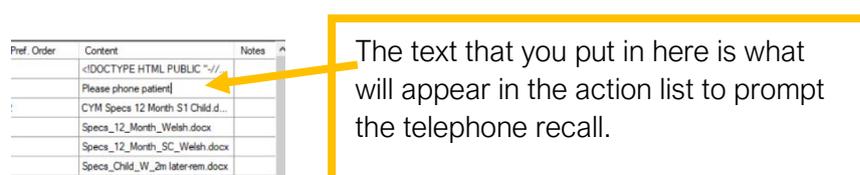
SMS

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



Phone

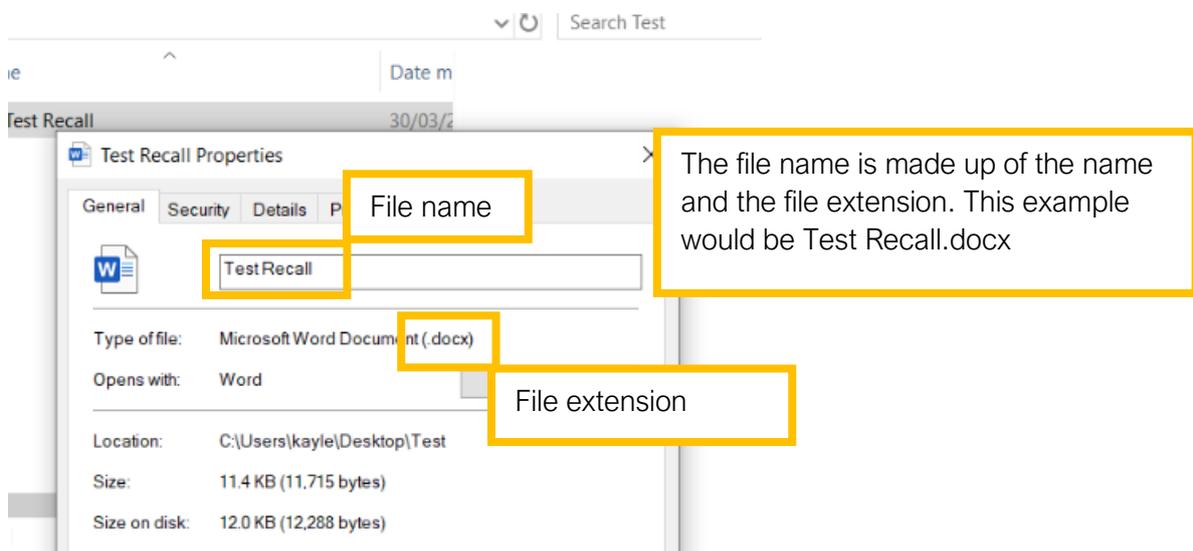
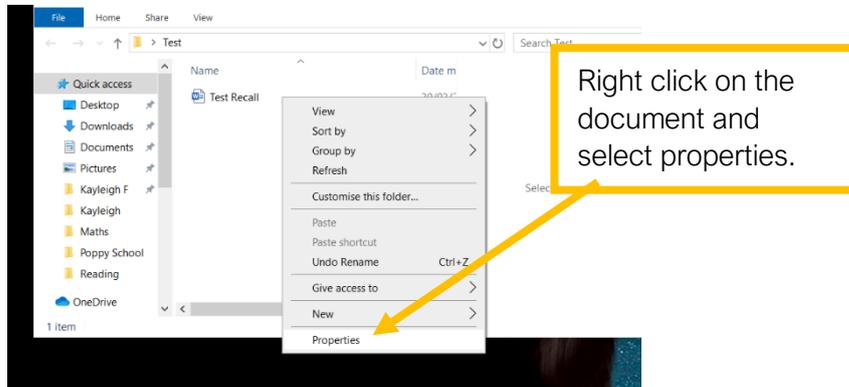
If the communication type is phone you can type directly into the contents box.



Letter

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.

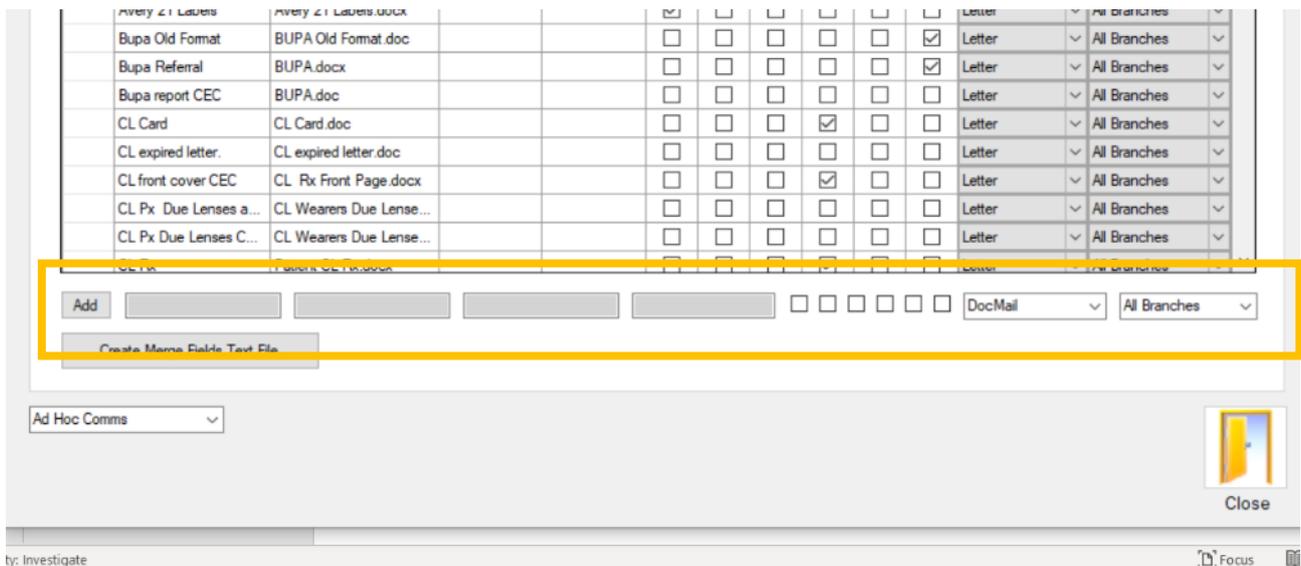


Ad Hoc Comms

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 [document set up](#) 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.



- 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.
 - Mktg** This will allow the document to be sent from the Marketing module.
 - Px** This will make the document available  from the send note button in patient records.
 - Rx** This will make the documents available from the prescription module
 - CL** This will make the documents available from the contact lens module
- 4) Choose what you would like to happen when a word document is generated.
 - Print** 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.
 - Save** 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:

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:

<input checked="" type="checkbox"/>	Communication Stage	<input type="text" value="12 months Stage 1"/>
<input type="checkbox"/>	Communication Name	<input type="text"/>
<input checked="" type="checkbox"/>	Maximum Age	<input type="text" value="15"/>
<input checked="" type="checkbox"/>	Preference Order	<input type="text" value="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.

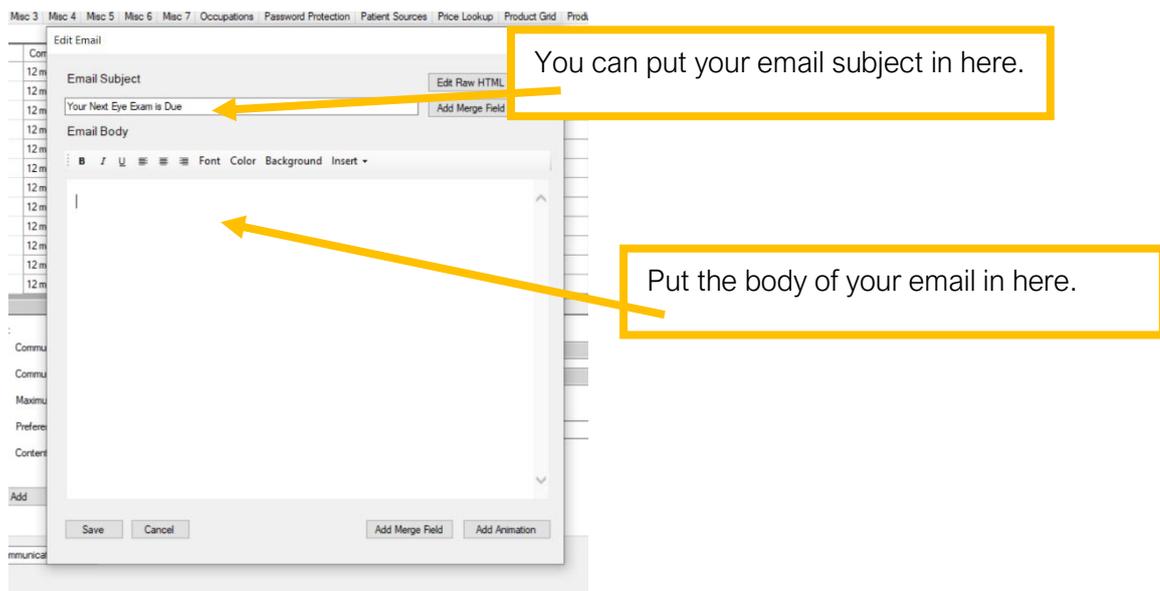
To add your content double click on the empty contents box of the communication you are editing.

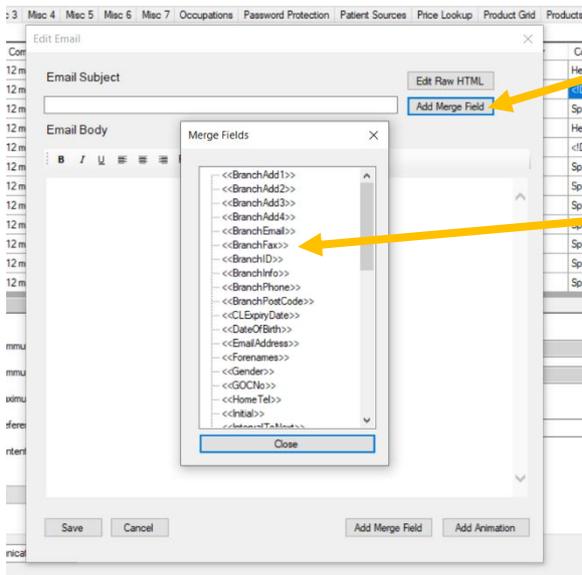
Communication Stage	Communication Name	Max Age	Pref. Order	Content	Notes
12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh e...	15	1	<!DOCTYPE HTML PUBLIC "-//...	
12 Cymraeg Stage 1	12 Cymraeg Stage 1 U16 Letter	15	1		
12 Cymraeg Stage 1	Specs_12_Month_Child_Welsh.d...	15	2	CYM Specs 12 Month S1 Child d...	
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

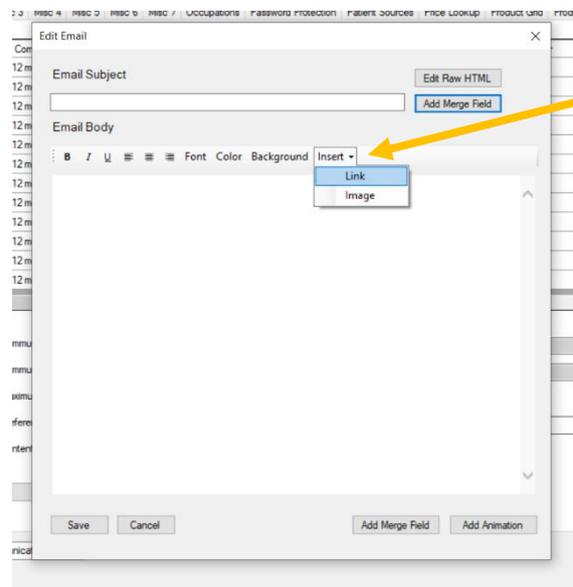
If your communication type is an email the following window will open:





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.

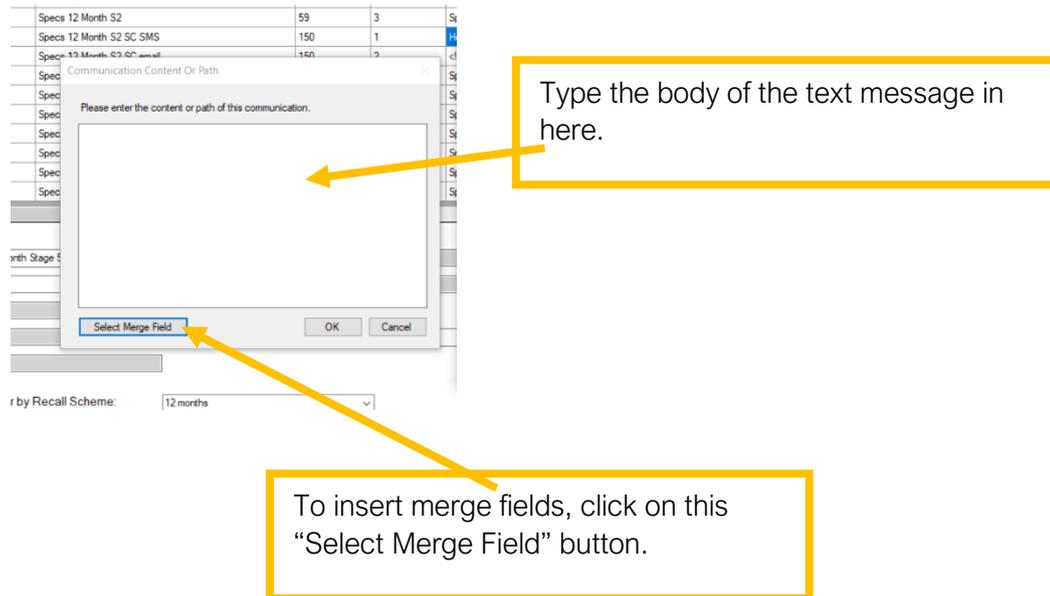
Please note: this merge field button only works for the subject line. To insert merge fields in the body of the text use the “Add Merge Field” button at the bottom of the window.



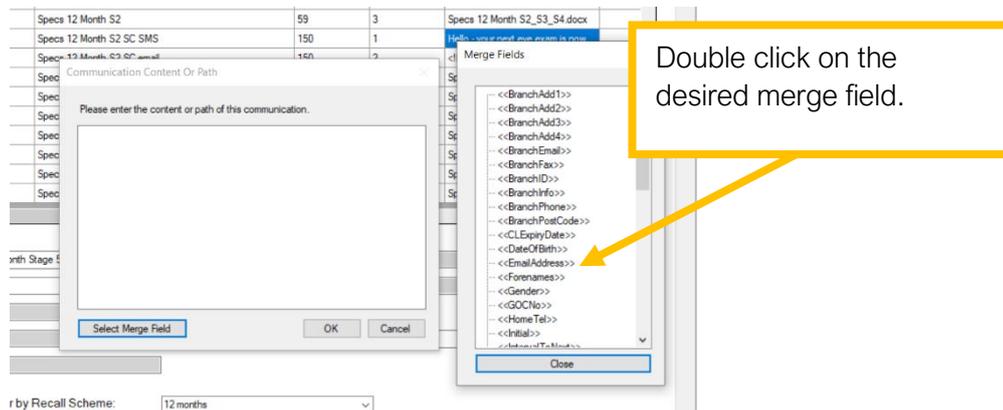
You can add links to your email by clicking on “insert” then “link”. This will open a new window.

SMS

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



To insert merge fields, click on this "Select Merge Field" button.



Phone

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

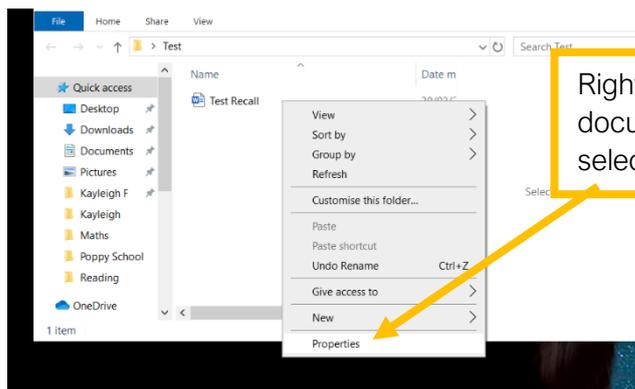
Prof. Order	Content	Notes
	<!DOCTYPE HTML PUBLIC "-//	
	Please phone patient	
	CYM Specs 12 Month S1 Child d...	
	Specs_12_Month_Welsh.docx	
	Specs_12_Month_SC_Welsh.docx	
	Specs_Child_W_2m laterrem.docx	

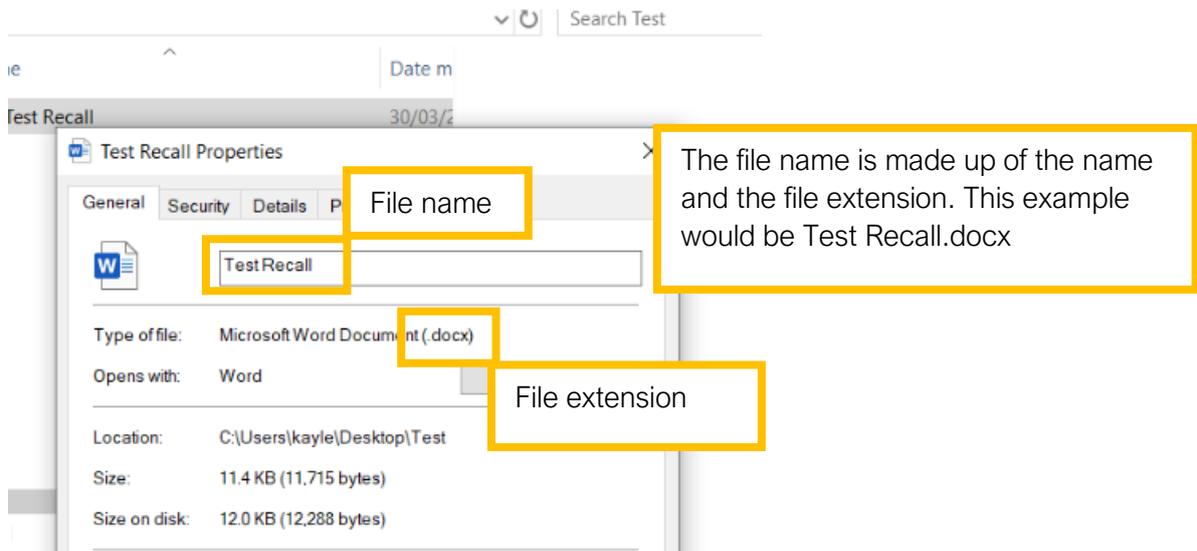
The text that you put in here is what will appear in the action list to prompt the telephone recall.

Letter

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.





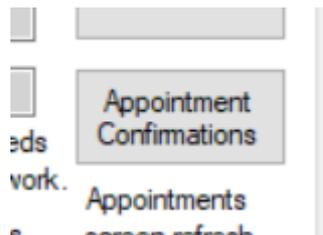
Automatic messages

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

Appointment Confirmations

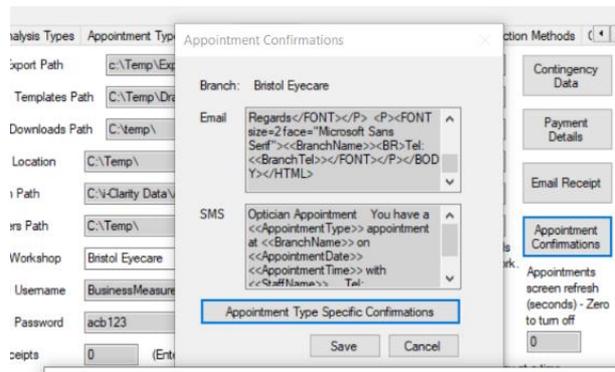
In the Branches tab:

- 1) Click on the Appointment Confirmations button.



This will open a new window.

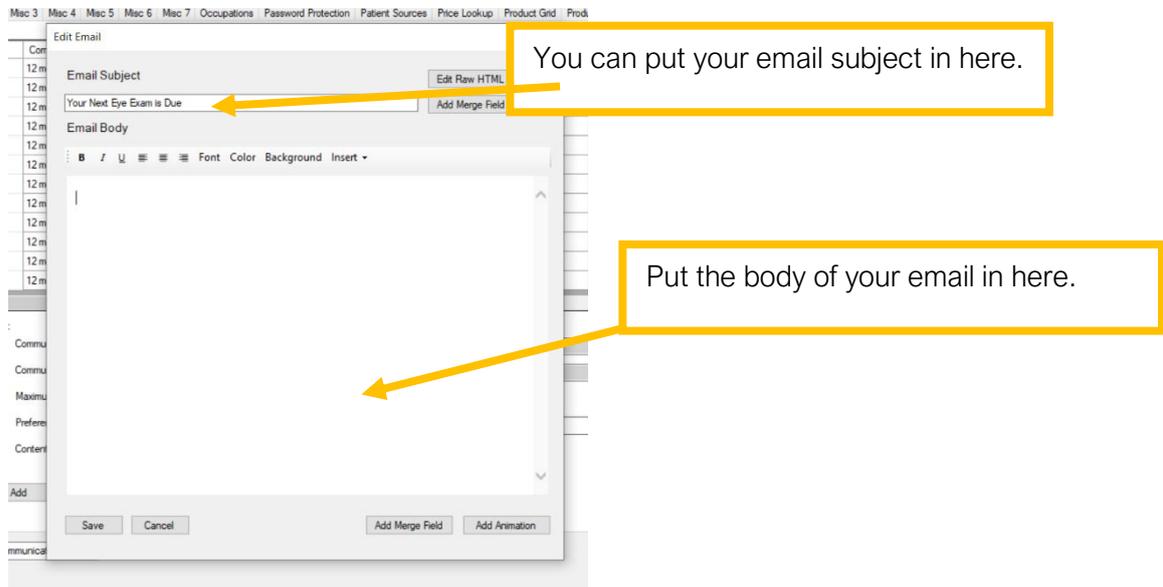
2) Double click in either the email or SMS box to edit the message content.

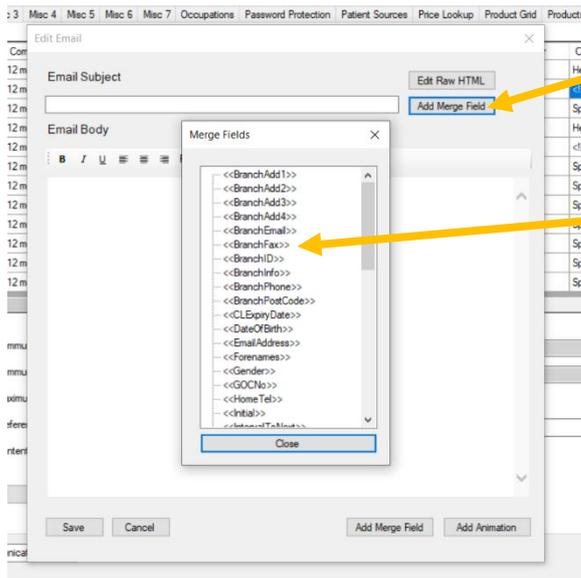


This will open a new window

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

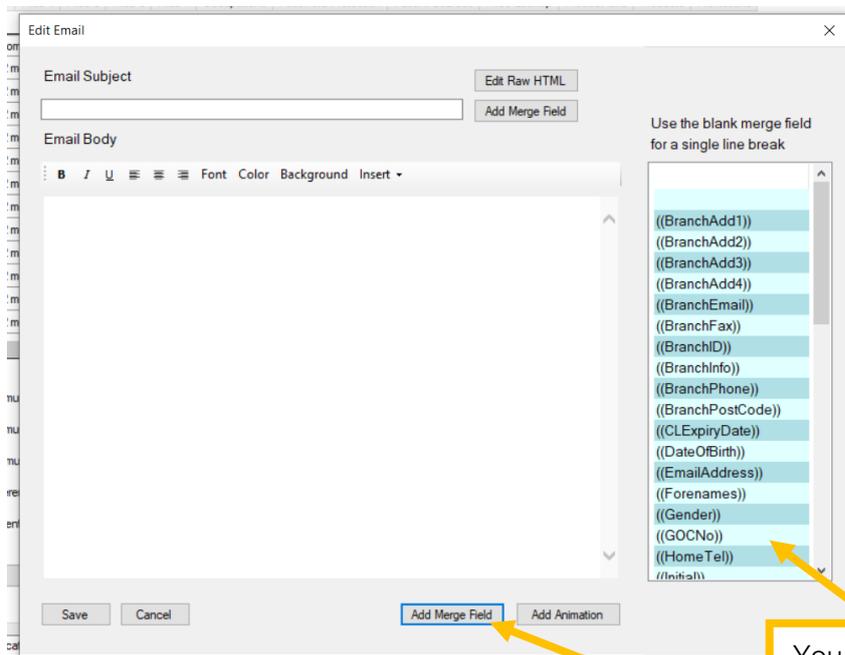
Email





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.

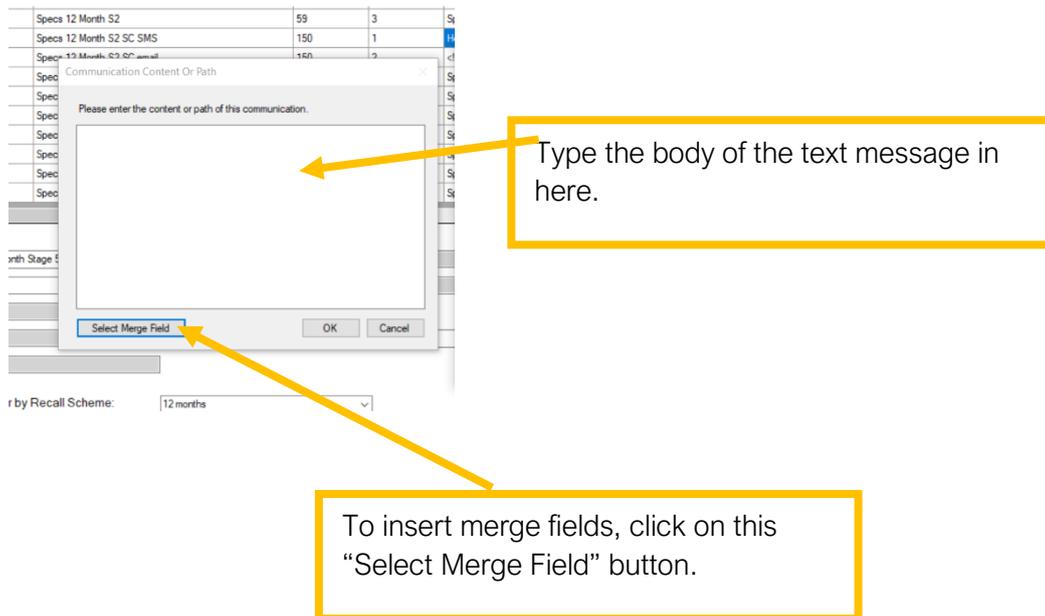
Please note: this merge field button only works for the subject line. To insert merge fields in the body of the text use the “Add Merge Feld” button at the bottom of the window.



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.

SMS

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

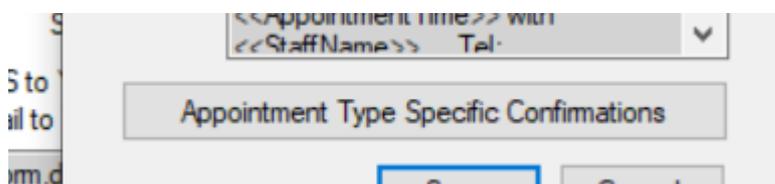
You can create different messages for different appointment types, E.g. you may want to include a reminder to wear contact lens' for an aftercare appointment.

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



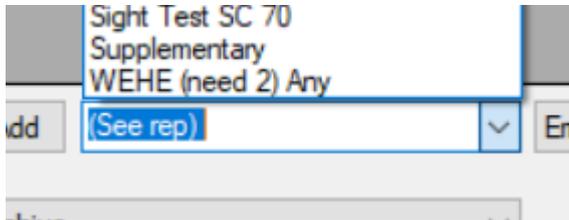
This will open a new window.

- 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

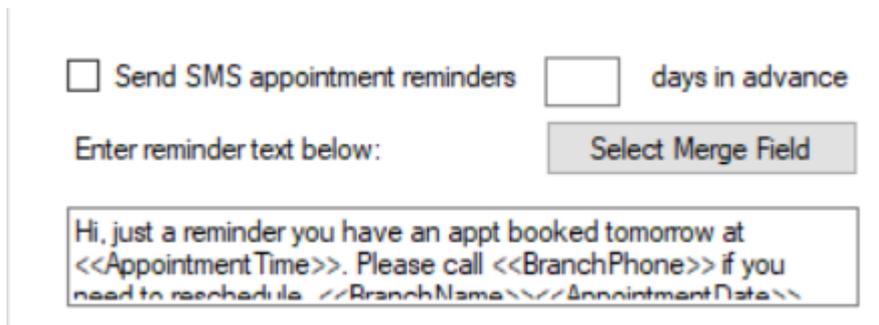
- 6) Once the communication has been added to the list, double click in the content box to open the communication window.

	Appointment Type	Type	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:

Hi, just a reminder you have an appt booked tomorrow at <<AppointmentTime>>. Please call <<BranchPhone>> if you need to reschedule. <<BranchName>> <<AppointmentDate>>

- 1) Check the “send SMS appointment reminders” box



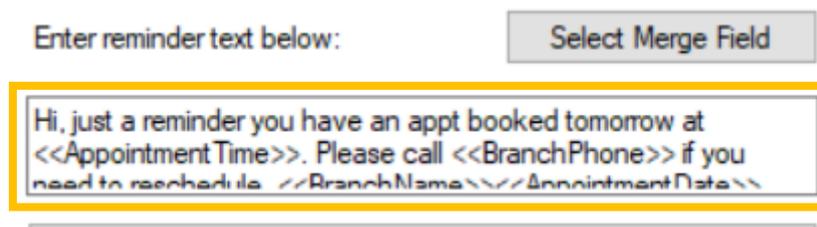
Send SMS appointment reminders |

- 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.



Enter reminder text below:

Hi, just a reminder you have an appt booked tomorrow at <<AppointmentTime>>. Please call <<BranchPhone>> if you need to reschedule. <<BranchName>> <<AppointmentDate>>

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



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:

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.

ethnicity

SMS appointment reminders days in advance Or: Use manual reminders

Enter text below:

Reminder you have an appt booked tomorrow at Also, pl

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.

Appointments Detail

SMS From

NHS Form Path

Rx Form Path

Email footer

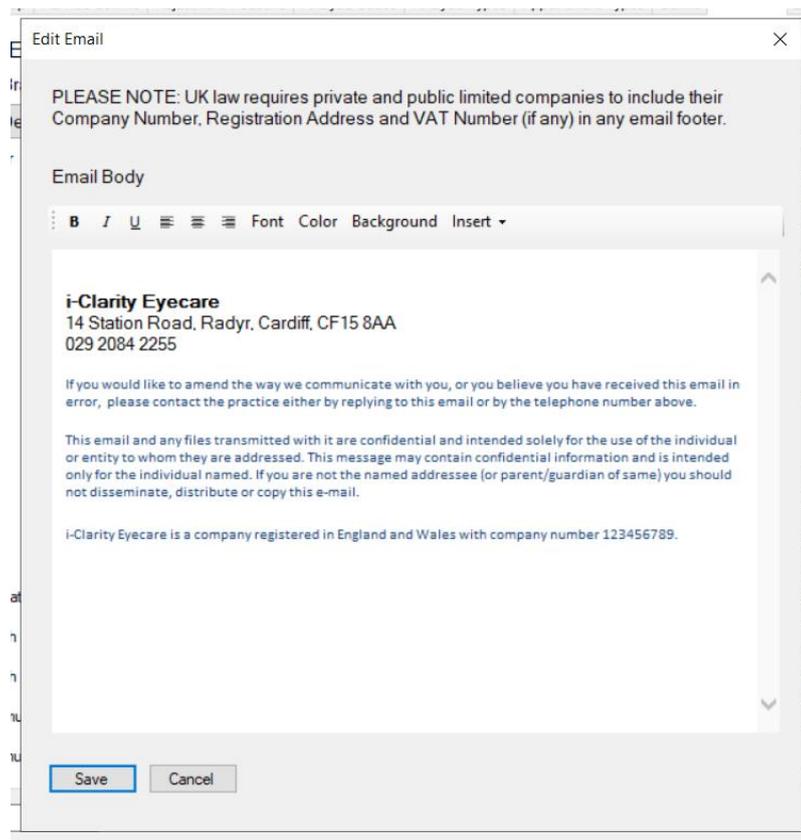
You can add an email footer in each branch tab that will be added to the bottom of all emails sent through i-Clarity:

- 1) Double click on the text box



This will open a new window

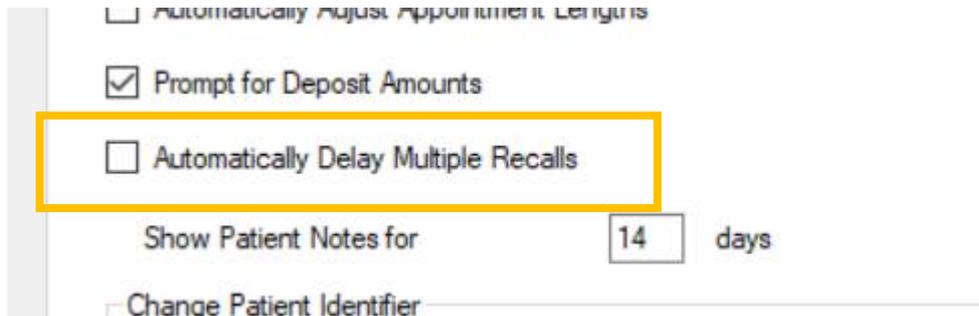
- 2) Type your email footer in the window.



- 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.



The screenshot shows a portion of a settings form. It includes several checkboxes: 'Automatically Adjust Appointment Lengths' (unchecked), 'Prompt for Deposit Amounts' (checked), 'Automatically Delay Multiple Recalls' (unchecked and highlighted with a yellow box), 'Show Patient Notes for' (with a text input field containing '14' and the word 'days' to its right), and 'Change Patient Identifier' (unchecked).

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.



The screenshot shows a portion of a settings form. It includes two checkboxes: 'Send Long SMS Without Prompting - PLEASE NOTE: THIS MAY INCUR ADDITIONAL COSTS' (unchecked) and 'Registered Optician Sign-off Required for Under 16s' (checked).

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.



The screenshot shows a portion of a settings form. It includes a text input field labeled 'SMS Exe Path' which is currently empty.