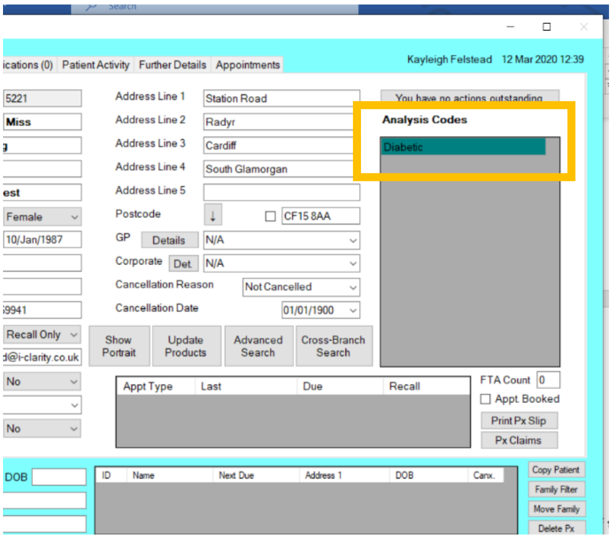
Patient Record set up

i-Clarity Version 3.2.9

Contents

Analysis codes



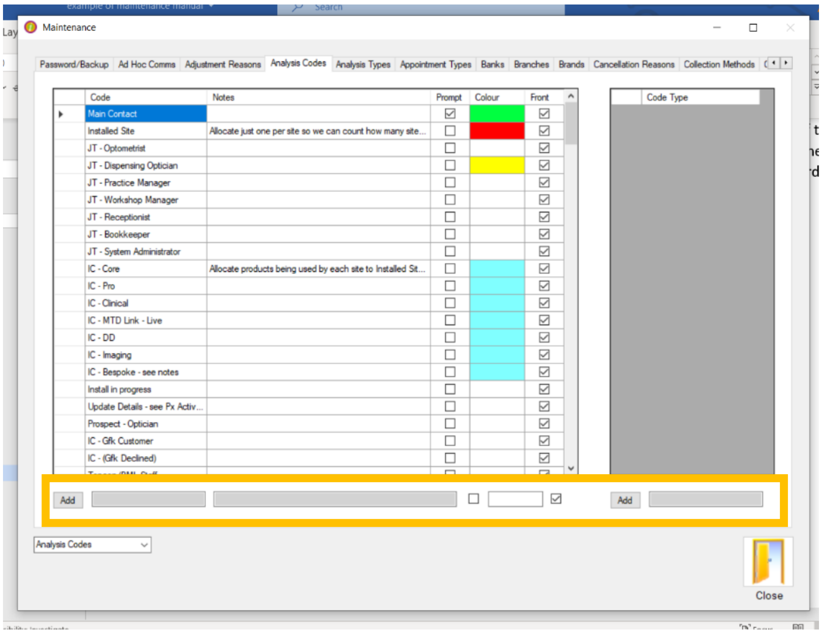
Analysis codes are common headline information that you want to add to the front page of the patient's record. E.g. if a patient is on a direct debit, or is diabetic, or part of a loyalty scheme.

You can also filter patients by analysis codes in the marketing module. By default, any code assigned to a patient will be displayed on the front page of their record.

Open the maintenance module

Navigate to the Analysis Codes tab.

Adding a new analysis code



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

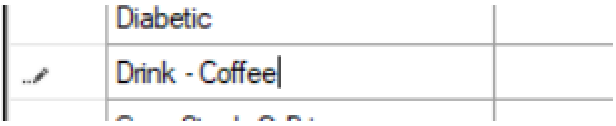
1. Name of the code as you want it to appear in the patient record.
2. The next box is for any notes.
3. When an analysis code with a prompt is selected, the system will pop up a dialog box when you open the appointments page, as a reminder that the patient has this analysis code. If you would like a prompt for patients with this code, you can check this box.
4. Double click in the white box to open the colour palette and select a colour if you want to highlight the analysis code.
5. All analysis codes show up on the front page of the patient's record by default. If you would like an analysis code that can be assigned to patients records but does not show up on the front page you can uncheck the last checkbox. This is useful for filtering patients out in marketing without having the code appear with the patient's headline information. These codes will be visible in the further details tab on the patient's record.

Click add.

Amending an analysis code

If you would like to edit an analysis code you can do so in the analysis code tab in the maintenance module.

1. Find the analysis code you would like to edit in the analysis code tab in maintenance.



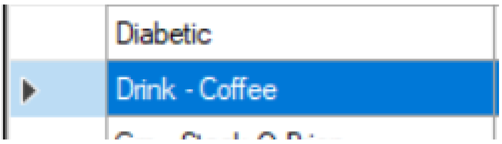
2. Click in the box to highlight the analysis code, and then again to edit.
3. Type in the new name of the analysis code and then click out of the box to commit the changes.

Please note: The analysis code will be renamed throughout the system. So, any patient that has the code you edited assigned will now display the edit.

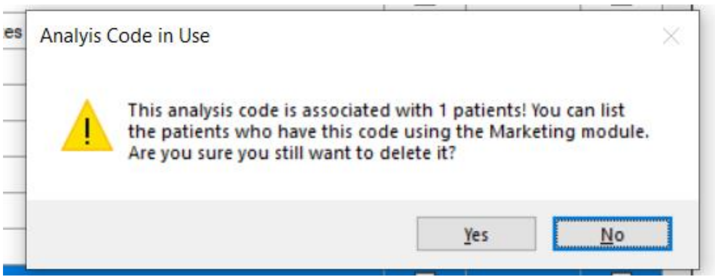
Deleting an analysis code

You can delete analysis codes from the system.

1. Find the analysis code you would like to delete in the analysis code tab in the maintenance module.
2. Click on it to highlight. The arrow shows which analysis code you are editing.



3. Press the delete button on your keyboard.
4. You will see a warning if the analysis code is assigned to patients

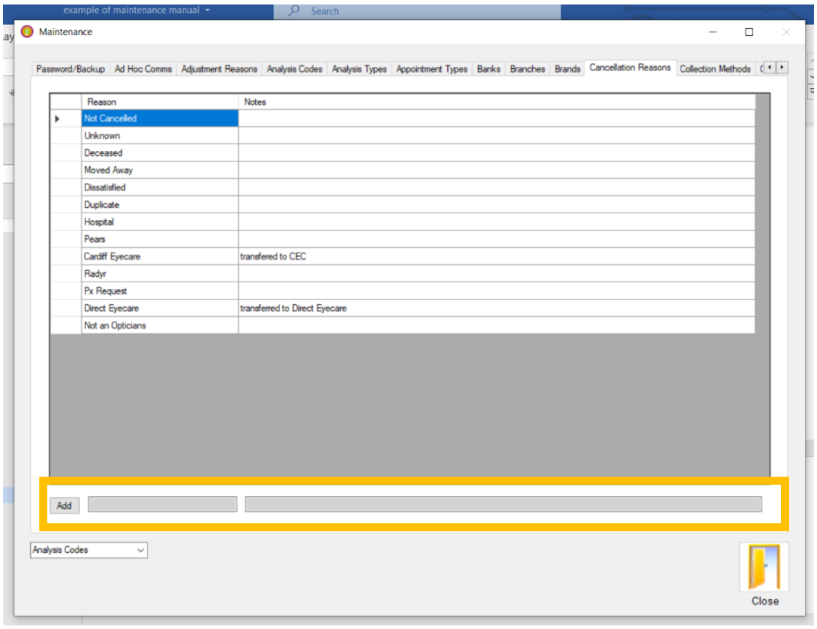


5. If you click yes, the analysis code will be deleted and removed form all patients that have previously been assigned the code.
6. If you click no, the analysis code will not be deleted.

Cancellation reasons

This is where you can populate reasons a patient record may be cancelled. A cancelled patient's record will not allow any appointments to be booked, no transactions to go through, and no communications to be sent.

Go to the cancellation reasons tab in the maintenance module and fill in the boxes at the bottom of the page from left to right.



1. Fill in the name of the reason in the first box.
2. There is another free text box for any notes.

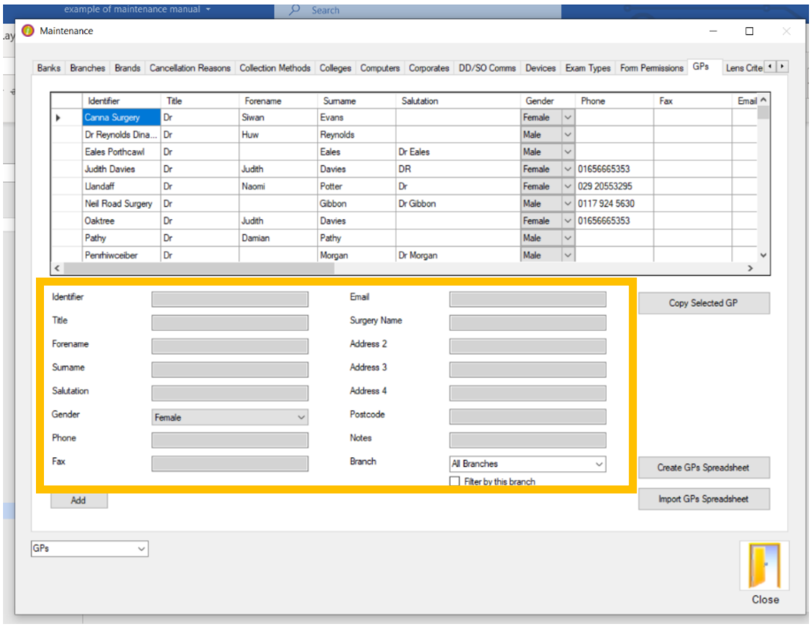
Click add.

GPs

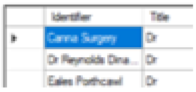
In the maintenance module, go to the GP tab.

This is where you can populate the GP's in your area that can then be added to a patient's file, i-Clarity will use this to fill in NHS forms etc

Fill in the GP's detail in the boxes at the bottom of the page.



<u>Top tip</u> You can copy GP's from one practice to another. Click on the GP you want to copy in the grid. The arrow shows which GP you are copying.



Then click the "Copy Selected GP" button.

This will autofill the GP's details into the boxes, change the branch details and then click add.

Editing GPs

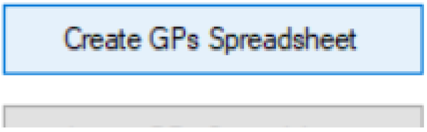
You can allow users to modify GP records even if they do not have maintenance access. This is in the Misc. tab “Allow users to modify GP records” checkbox.

If this is checked then users will be able to modify the details of a GP for all patients assigned to that GP from a patient’s record.

Replacing GP’s

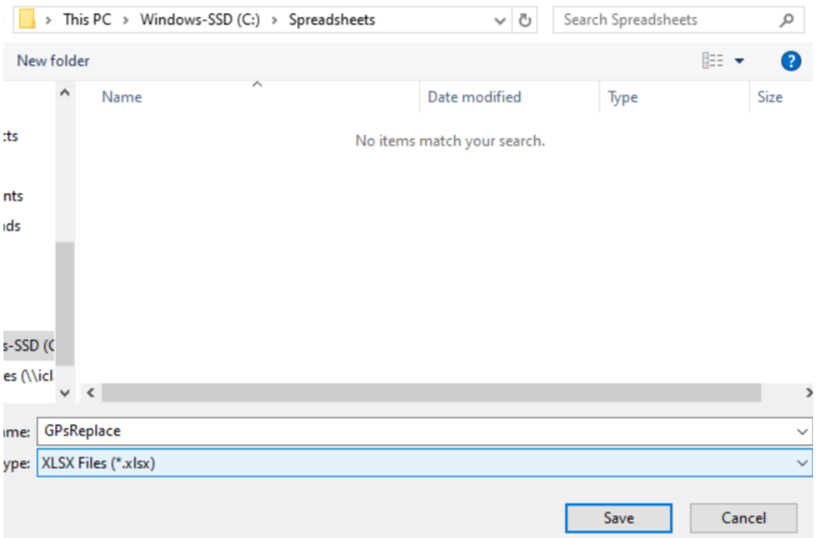
In order to keep your GP list tidy, when a GP retired or leaves a practice, we suggest that you use the spreadsheet function in the GP tab in maintenance to replace the GP with another GP at the practice.

1. Navigate to the GP tab in the maintenance module.
2. Click on the Create GP spreadsheet button.



This will open a new window

3. Choose where you would like the spreadsheet to save and rename it if you wish.

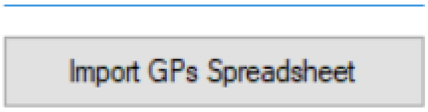


4. Navigate to where you have saved the spreadsheet and open it.
5. Insert the Identifier of the GP you wish to use to replace the old GP into the “replace with” column next to the GP you are trying to remove.

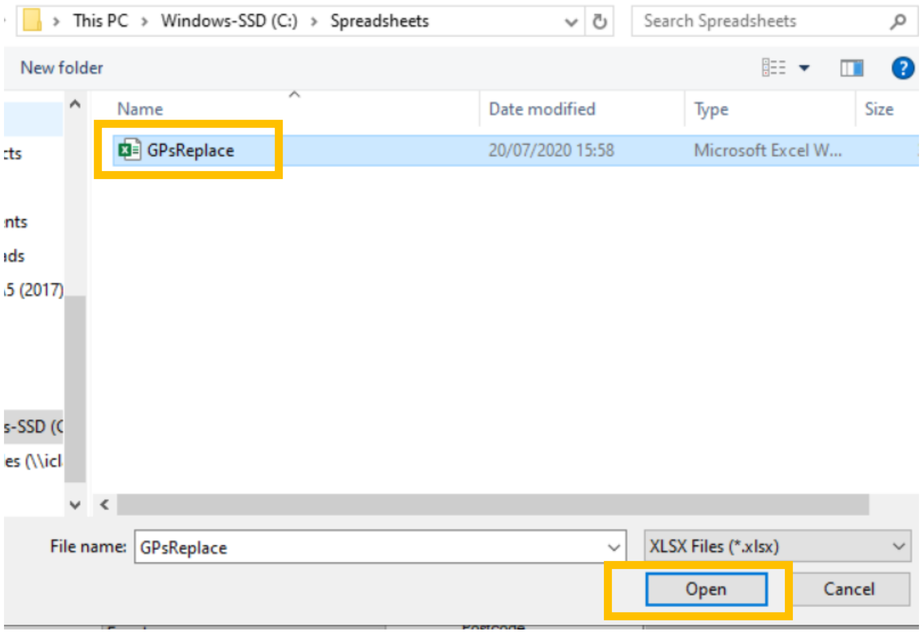
Identifier	Forename	Surname	Address 1	Postcode	Branch	Replace With
Aberman Surgery Wardrop	John	Wardrop	Aberaman Surgery	CF44 6SR	Bristol Eyecare	Aberman Surgery Smith
Aberman Surgery Smith	AG	Smith	Aberman Surgery	CF44 6SR	Glasgow Eyecare	

E.g. Dr John Wardop has left Aberman Surgery, so we are replacing him with Dr Smith.

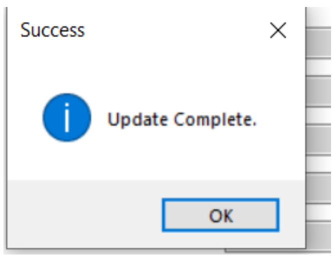
6. Save the changes to the spreadsheet.
7. Go back to the GP's tab in the maintenance module and click on the "import GP spreadsheet" button.



8. Navigate to where the form was saved, select the spreadsheet, and click open.



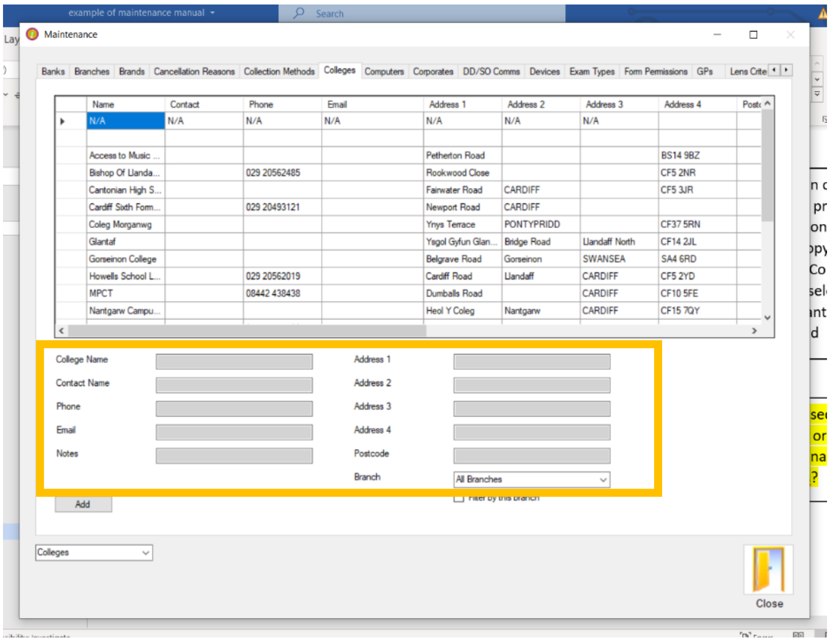
9. You will see the following message when the spreadsheet imports successfully,



Colleges

In the maintenance module, go to the Colleges tab. This is where you can add the colleges that are local to your practice to add to patients files. i-Clarity will use this to fill in NHS form etc.

Fill in the college information into the boxes at the bottom of the page.



Click add.

Editing Colleges

You can allow users to modify college records even if they do not have maintenance access. This is in the Misc. tab “Allow users to modify college records” checkbox. If this is checked then users will be able to modify the details of a college for all patients assigned to that college from a patient’s record.

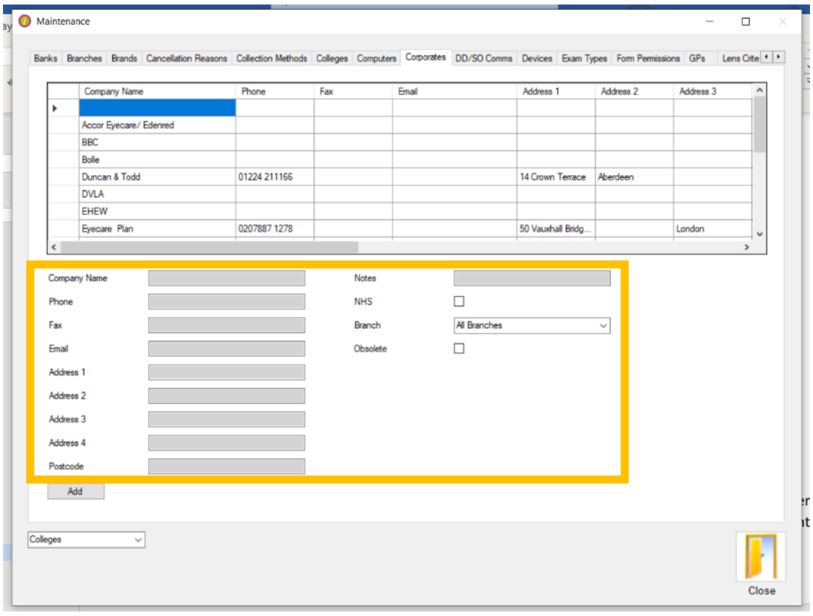
Corporates

When someone else is paying for services or products on behalf of the patient, the balance is cleared off the patient's record as they do not owe any money. The balance to be paid goes into the deferred payments module, so that you can track what is owed.

Payments due for GOS forms on the NHS are already set up to go to deferred payments, but you may have other third party payers such as eden red, or a local company that uses your services for their employees.

You can add the details of any corporate clients that you use for their eye care, and third party national corporate schemes. This can then be added to a patient's record and when a corporate fee goes through the till the fee will go into the correct corporate file in deferred payments. You can also use a corporate to automatically pay a product off into the correct deferred payment folder. E.g. you can have an Eden Red eye exam fee and when this is selected it will not go through to the till page, it will automatically pay off to the deferred payments module under the Eden Red heading.

1. Fill in the corporate company's details in the boxes at the bottom of the page.



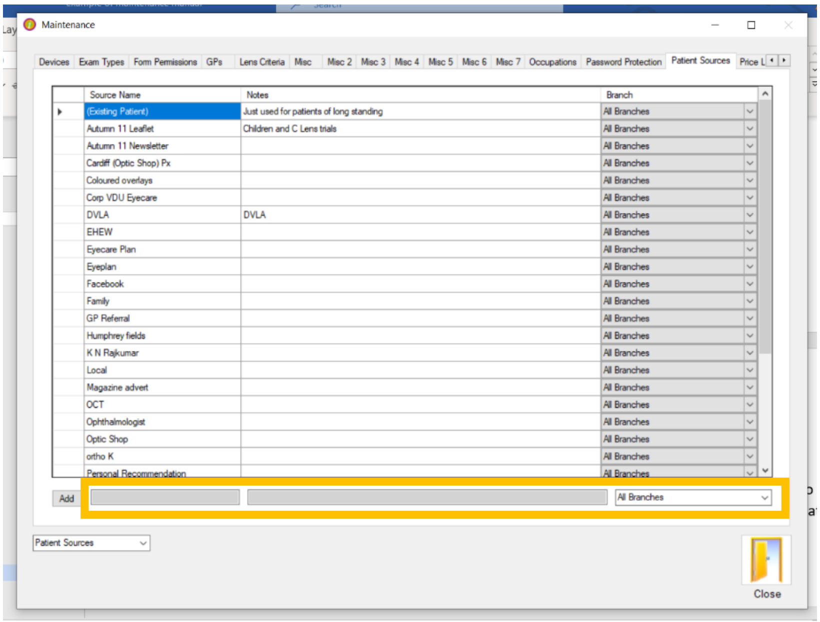
2. Click add.

Patient Sources

This is where you can add options of how your patients may have heard of you and add it to their record. This list is also used in the attendance reason drop down list when you are booking appointments. This is useful for recording how successful marketing campaigns are or how many patients have been recommended to your practice using the reports in i-Clarity.

Go to the Patient Sources tab in the maintenance module.

1. Fill in the boxes at the bottom of the page, from left to right, with the name of the source, any notes, and the branch from the dropdown list.

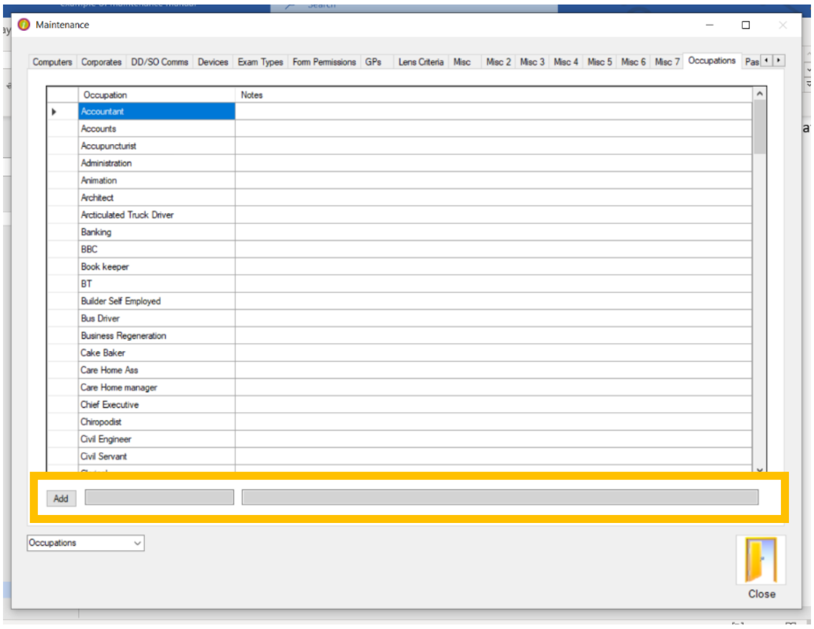


2. Click add.

Occupations

You can create a list of occupations to record in a patient's record. There will be a list of common occupations already in i-Clarity, but you can add more in the Occupations tab in the maintenance module.

1. Add the occupation and any notes in the boxes at the bottom of the page.

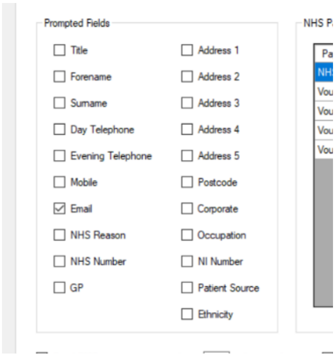


2. Click add.

Prompted fields

You can select certain fields in patient records as prompted fields. This means that if this field is not filled in, when the user leaves the patient record a warning message will show up. To set these fields go to Misc. 2 tab in the maintenance module.

Tick the box of the field you would like to have a prompt for

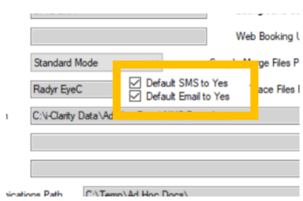


Additional patient record configuration options

Default communication preferences

In patient records, there are dropdown lists for email and SMS communication options to help with GDPR rules. The customer can choose to accept or decline receiving email updates, and, if they are happy to receive SMS messages, recall only, or phone only on their mobile. You can set the default for the lists in the branches tab in the maintenance module

If the checkbox is ticked the dropdown will default to “Yes” for the SMS section, if unticked it will default to recall only.

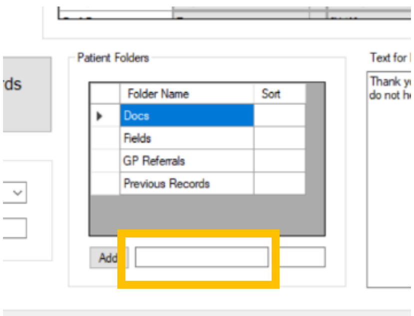


If the checkbox is ticked the dropdown will default to “Yes” for the email section, if unticked it will default to No.

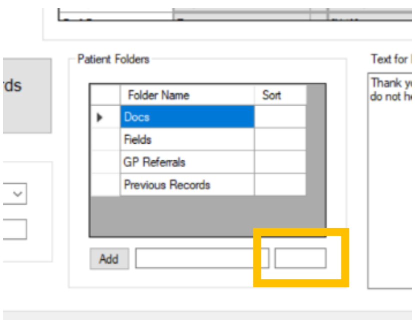
Patient Folders

You can add documents to patients records such as hospital letters, field results, previous records etc. You can separate the documents out into different folders to make it easier to find what you are looking for when you retrieve them. If you wish to add any extra patient folders, such as PEARS/MECS paperwork in their own folder, you can do so in the Misc. 4 tab:

Insert the name of folder in the text box.



You can choose the order that the folders appear in the list by putting the number in the box.



This will order the folders so that the most popular ones are at the top. Otherwise they will be displayed in alphabetical order.

Click add.

Show patient notes

i-Clarity creates a number of system notes in patient activity for when appointments are booked, changes are made to the patient front page, communications are sent etc. You can choose how long these notes stay in the system for to keep the patient activity tab tidy.

Enter the number of days you would like to keep the notes for in the box:

Please note: the notes are not permanently deleted and can be seen by checking the show all box in the patient activity tab.

Notes added by users are unaffected and will remain visible in the patient activity tab.