Due Date and Recall Communications

Located in the middle of the front tab of the patient record is a summary of the patient's last visits.

If the patient has a spectacle prescription created at an appointment, or a clinical record is completed, then a summary line will be created in this box. It will display the type of the appointment 'Eye Exam' followed by the date the patient was seen to create this prescription, the date the patient is due for another visit and the recall scheme this patient was put on.

If the patient has a contact lens appointment where a prescription or a contact lens clinical record is created, then another line will appear in this box. It will start with the type of the appointment which will be 'CL Visit' followed by the date this contact lens clinical record or prescription was created, then the date the patient is due to be seen again and the recall scheme this patient was put on.

If the patient comes in for an appointment that is neither an eye exam nor a contact lens visit for example a dry eye check and a clinical record of type 'other' is created then this will also be summarised in this box.

When a patient becomes overdue for an appointment then the due date of that appointment type will be pink.

The due date of the patient's next eye exam is also displayed in the search box, this date will also go pink if the patient is overdue this appointment.

More information about the patient's recall can be viewed on the patient communications page. To navigate to this page, click on the 'Patient communications' tab at the top of the record. The number displayed next to this tab title shows the number of recall communications that are active on this patient.

All the available recall schemes a patient can be assigned to are displayed in the left-hand column. The recall schemes the patient has been assigned to are highlighted in green.

Preceding the name of the recall scheme is an abbreviation of the type of recall the patient is on.

- [ST] is added to the front of eye examination or sight test recalls.
- [CL] precedes all the contact lens recalls.
- [OTH] precedes recalls that are assigned to other exams such as dry eye.
- [MISC] precedes recalls that are assigned to none of the above schemes.

The patient can only be assigned to one sight test, one contact lens and one 'other' recall but they can be assigned to multiple misc recalls.

The top right-hand box on this page shows the next communication that is due to go out to the patient for each of their assigned recall schemes.

Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[CL] CL12	1	04/Dec/2018	CL12 Stage 1
[ST] 24 months	1	21/Jun/2020	24 months Stage 1 (2 years)

Communications Sent   Show Due Date

Each line shows the following

1. The recall scheme name.
2. Sequence No. This is the number of the stage they are on for their recall reminders – Sequence No. 1 would be their first stage so, the first communication to be generated from the system to remind the patient they are due for an appointment. Sequence No. 2 would be the second stage, so the second communication that the system generates to remind the patient they are due for an appointment and so on.
3. Send Date, this is the date the communication is due to go out. Because this is the send date of the recall rather than the due date of the appointment it is normal for this date to be slightly different to the due date shown on the front of the patient record.
4. Communication Stage- this is the name the stage has been given in the maintenance of your i-Clarity system.

If need be this stage number and date can be manipulated.

Single click in the stage number field or the send date field until a cursor appears or the text becomes highlighted. Then you can amend to a different stage or a more appropriate send date.

Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	1	26/Apr/2020	12 months Stage 1
[CL] CL6	1	21/Oct/2020	CL6 Stage 1

The main reason to manipulate a send date is after a patient has received their first communication and may want to delay their second reminder due to a holiday or hospital appointment.

The communications sent box shows information about the communications that have already been sent to the patient.

Communications Sent   Show Due Date

Recall Scheme	Sequence No	Date Sent	Communication
[ST] 12 months	1	26/Jun/2018	12 Months Stage 1 SS Phone
[MISC] Specs Ready	1	13/Dec/2017	Specs Ready 1st SMS

Copy Patient
Family Filter

There are two ways to stop i-Clarity sending recalls to patients.

One way to stop i-Clarity from sending recalls to a patient is by ticking the 'stop all recalls' box, whilst this box is ticked no recalls will be sent out from the system. It is worth noting that this tick box is never automatically unticked by the system. So, all future recalls will be stopped until the box is unticked.

☐ Stop All Recalls

You can check at any time which patient records have this boxed ticked by running a patient report.

Open the report module. Leave the patients report option selected.

Reports

Forename		Rx From	☐ 29
Surname		Rx To	☐ 29
Age	To	CL From	☐ 29
		CL To	☐ 29

Please select a report: Patients

Without	☐ 100% Optical 2018	Canx After	April	2020	
Recalls Stopped	☑ Yes	Canx Before ☐ 29	April	2020	
Scheme	☐ 12 Cymraeg				

Run Report

Tick the box next to the criteria 'Recalls stopped' and make sure yes is selected.

Click Run Report.

Another way to stop a recall from sending is to remove it from the communications pending box, you can do this by double clicking on the recall line you do not want to send. If this box is empty then there is no recall to send, however when the patient attends their next appointment and a new recall is assigned to their record this box will be repopulated and the patient will receive a recall when they are next due.
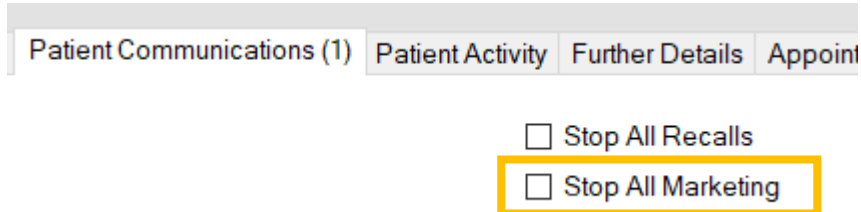
Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	1	26/Apr/2020	12 months Stage 1
[CL] CL6	1	21/Oct/2020	CL6 Stage 1

Double click here to remove

Also, on the patient communications tab is a tick box labelled 'Stop All Marketing'.

Ticking this box will stop the patient appearing in the marketing module for all communication types.
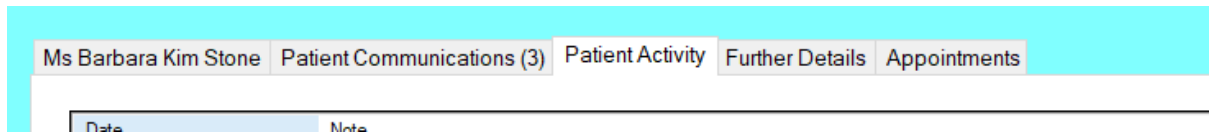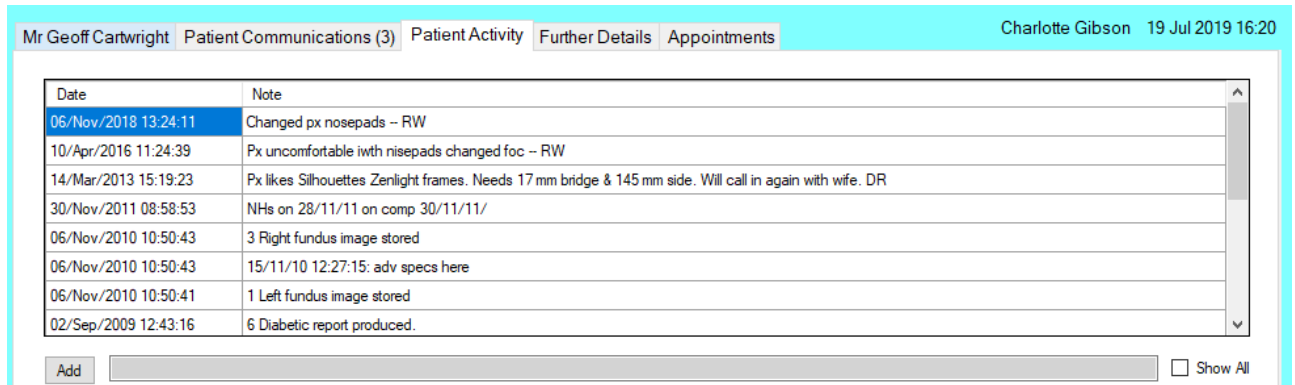

Except when the 'search patient database' and 'ignore communication preference' options are selected in marketing.

Patient Activity

The next tab along the top of the patient record is Patient activity.

The page is split into two sections, the top section is used to record past and present notes about the patient journey e.g. Patient rang to request we order some more drops for them.

To add a note, you type in the long grey box and then click the add button.
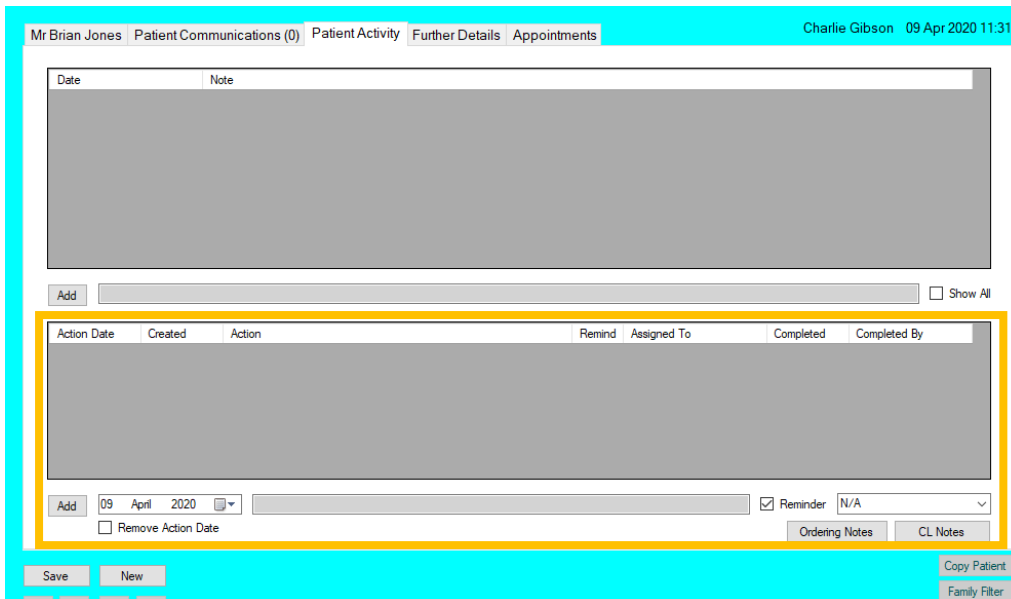

This will add the note to the top of the patient activity grid with a time and date stamp. Also, the initials of the staff member logged in to the system when the note was added.
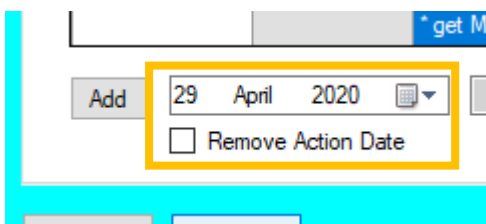
Patient Actions

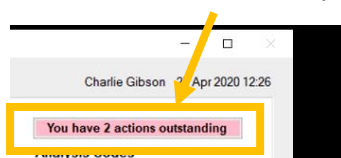The bottom section of the patient activity page is called the patient actions.

In this section you can record items that need to be done in the future e.g. call patient to follow up on new contact lenses or information about the patient that needs to be flagged when they next contact the practice.
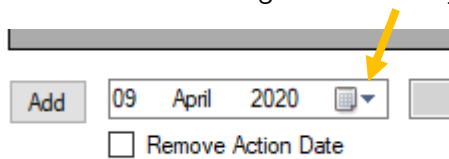
Action Date

This is the date you would like the action to be completed, and therefore it is the date the action will appear on the action list.

(The action list is a list of patient actions that are due or overdue and can be accessed from a button on the top right corner of the main screen.)

You can select the action date by clicking on the arrow next to the date to open a calendar and clicking on the date you would like the action to be done.

Remove Action Date, ticking this box will remove the date associated with this patient action. If a patient action has no date it will not appear on the action list. It will just pop up when a user opens the patient record. *(Patient information pop up on 6)*

Reminder

If the reminder box is ticked, then the patient action will pop up when a user opens the patient record.

Removing the tick from the reminder box will stop the patient action from popping up on the opening of the patient record.

Assigned To

This drop-down list allows you to select which user's action list the action appears on.

Leaving the 'Assigned To' as N/A will mean the action appears on all users' action lists.

Selecting a staff member from the list will mean the action only appears on that user's action list.

You can select a user from the assigned to drop-down here.

Once the action has been added you can see who the action has been assigned to in this column.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	☑	N/A ⌄		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	☑	N/A ⌄		N/A
13/Oct/2019	08/Oct/2019	new action 2 – Test	☑	N/A ⌄	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action – Test	☑	N/A ⌄	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	☑	Test User ⌄	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test – Test	☑	Test User ⌄	02/Oct/2019	Test User

Add | 20 April 2020 ▦▾ | | ☑ Reminder N/A ⌄

Date Completed

For actions that have yet to be completed this box will be empty.

Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	☑	N/A ⌄		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	☑	N/A ⌄		N/A
13/Oct/2019	08/Oct/2019	new action 2 – Test	☑	N/A ⌄	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action – Test	☑	N/A ⌄	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	☑	Test User ⌄	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test – Test	☑	Test User ⌄	02/Oct/2019	Test User

Add | 20 April 2020 ▦▾ | | ☑ Reminder N/A ⌄

Completed actions will have a date in this field and will no longer appear on the action list.
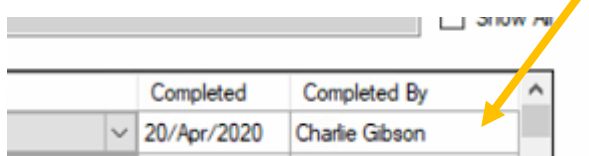
Action Date	Created	Action	Remind	Assigned To	Completed	Completed By
	07/Nov/2019	Ensure patient signs voucher on collection.	☑	N/A ⌄		N/A
	27/Nov/2019	This patient has been assigned to another recall scheme. See the p...	☑	N/A ⌄		N/A
13/Oct/2019	08/Oct/2019	new action 2 – Test	☑	N/A ⌄	12/Nov/2019	Test User
08/Oct/2019	08/Oct/2019	new action – Test	☑	N/A ⌄	09/Oct/2019	Sam Ward
08/Jul/2019	19/Jul/2019	Ensure patient signs voucher on collection.	☑	Test User ⌄	02/Oct/2019	Test User
26/Jul/2019	26/Jul/2019	test test – Test	☑	Test User ⌄	02/Oct/2019	Test User

Add | 20 April 2020 ▦▾ | | ☑ Reminder N/A ⌄

To enter a completed date, you can either double click on the date completed field, this will enter todays date, or you can single click in the field until you see cursor appear and then type in the date the action was completed.

	Completed	Completed By
⌄	20/Apr/2020	N/A
	20/Apr/2020	Charte Olson

Once saved the completed by field will automatically populate with the name of the user that completed the action within i-Clarity.

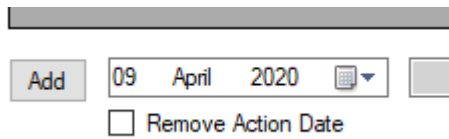*Actions will be listed in this box with uncompleted actions at the top and completed actions underneath these. Completed actions will be ordered by the date completed with the most recent date at the top.*

Adding a Patient Action

Select the date you would like the action to be completed/appear on the action list or tick the remove action date box.
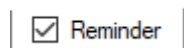

Enter details of the action to be done.

Untick the reminder box if appliable

If applicable select an i-Clarity user to assign the action to.

Click add.

The action will be saved in the main section with an automatically populated created date.

Examples of using the patient action facility.

General Action

A patient action should be added in this way when you want a note to appear on the action list for a particular day and the patient action can be completed by anyone. For example, please call patient to see how they are getting on with their new contact lens prescription.

Enter the date you would like the action to be completed.

Enter details of the action that needs to be completed.

Depending on the content and importance of the action tick or untick the reminder box e.g. if the patient phones before this date does the staff member talking to the patient need to know this information immediately. If yes, then the reminder box should be ticked.

Click Add.

Personal Action

A patient action should be added in this way when you want a note to appear on your action list for the day. For example, Ring patient to follow up on the adjustment I made to patient's spectacles.

Enter the date you would like the action to be completed.

Enter details of the action that needs to be completed.

Depending on the content and importance of the action tick or untick the reminder box e.g. if the patient phones before this date does the staff member talking to the patient need to know this information immediately. If yes, then the reminder box should be ticked.

From the 'Assigned To' drop down select your name.

Click Add.

Action for another staff member

An action point should be added in this way when you want a note to appear on another member of staff's action list. For Example, please read the GP letter that has been scanned into the patient record.

Enter the date you would like the action to be completed.

Enter details of the action that needs to be completed.

Depending on the content and importance of the action tick or untick the reminder box e.g. if the patient phones before this date does the staff member talking to the patient need to know this information immediately. If yes, then the reminder box should be ticked.

From the 'Assigned To' drop down select the name of the staff member who needs to complete the action.

Click Add.

Patient information Pop up

A patient action should be added in this way when you want a pop up to appear on a patient's record every time it is opened but the content of the action does not have an expiry date so does not need to appear on the action list. For example, Patient is hard of hearing.
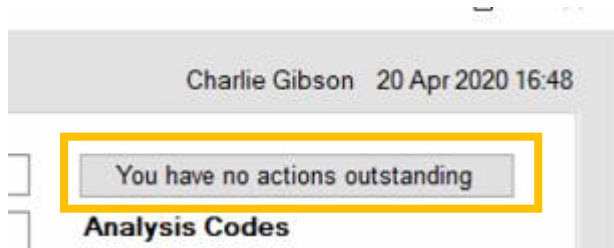
Tick to remove the action date.

Enter the information you would like to appear on the pop up.

Ensure the reminder box is ticked.

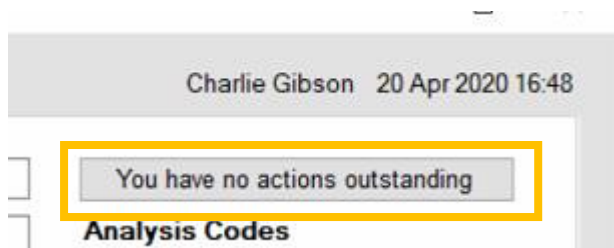Click Add.

Viewing Actions To Do

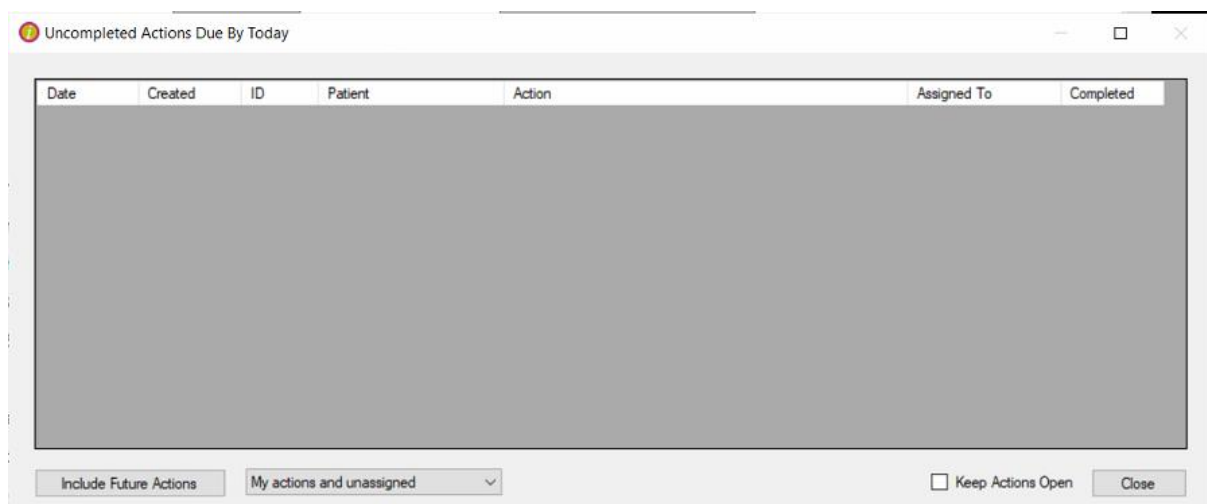On the top right of the main screen is the notification button.

Clicking on this button will show you a list of the actions due or overdue.

This button has 3 different states depending on the actions in the list and the user logged in.

1. You have no actions outstanding.

This state means that there are no unassigned actions due or overdue to be completed and there are no actions due to be completed by the user logged in.
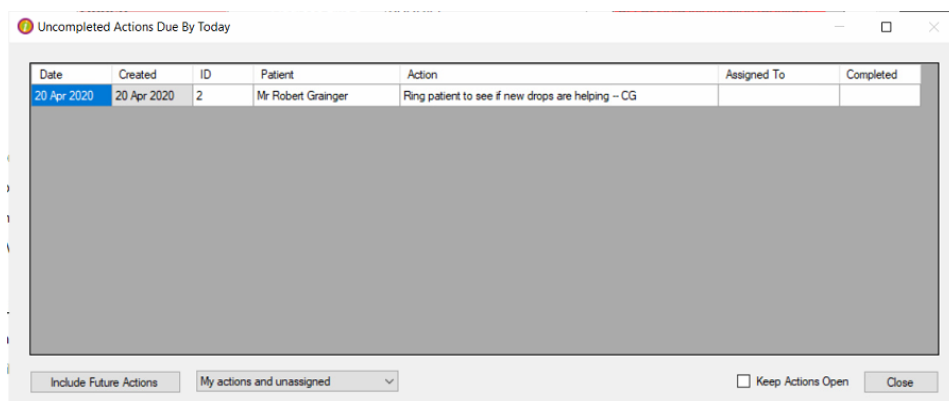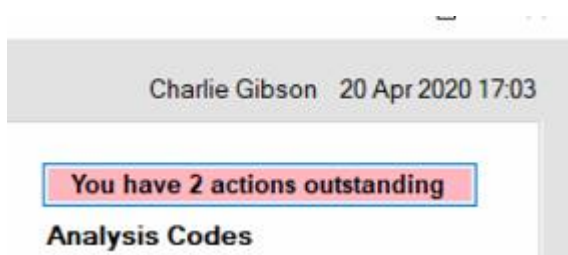
2. You have unassigned tasks pending

This state means there are unassigned tasks that need to be completed but for the user logged in there are no actions due that are assigned to them.

The number will change to represent the number of unassigned actions in the list.

3. You have actions outstanding

This state means that the logged in user has actions outstanding that are assigned to them specifically.

The name of the logged in user is shown above the button. The number will also change to represent the number of assigned actions outstanding. Please note, there may also be unassigned actions outstanding.

Date	Created	ID	Patient	Action	Assigned To	Completed
20 Apr 2020	20 Apr 2020	3	Miss Hannah Dubberley	Chase patient spectacles – CG	Charlie Gibson	
20 Apr 2020	20 Apr 2020	4	Mrs Myfanwy Maylin	Specs uncollected, please chase patient – CG	Charlie Gibson	

The Action List

By default, the action list shows patient actions that are due today or overdue and actions that are assigned to all users and the user logged in.

Actions assigned to the logged in user are highlighted green.

When actions become overdue, they become highlighted red on the patent record.

You can change the view of the action list by amending the selection in the drop-down list and by clicking on the future action button.

Include future actions

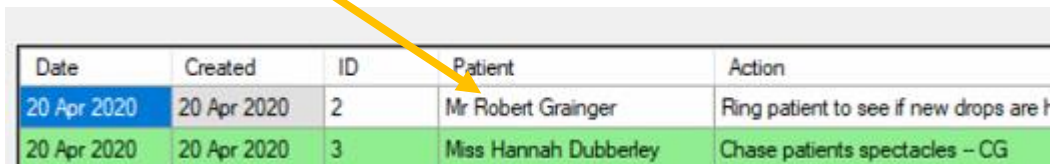Clicking this button, will add future actions to the action list.

My actions and unassigned drop-down list

The other available views on this drop-down list are; only my actions, only unassigned, and all actions.

i-Clarity will remember your last selection and reopen the list with this option already selected. When you log out and log back in the default selection of 'My actions and unassigned' will resume.
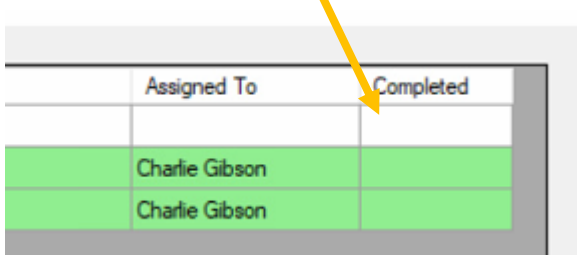
Patient Name

Double clicking on the patient name in the action list will open the patient record on the patient activity tab.

Completed Date

Double clicking on the completed date field in the list will enter today's date so that the action is completed.

Because the action list is editable, the first person in the practice to open this list will have edit rights and can complete patient actions from the list. Any other user opening the list whilst the first user still has it open will only have read rights. This means they cannot sign off patient actions from the list, but they can double click to open patient records and sign off actions directly from the record after they have been completed.

Keep action list open.

Ticking this box will keep the action list open, this means when you double click to view a patient record the action list does not automatically close.

Analysis Codes and the Further Details Tab

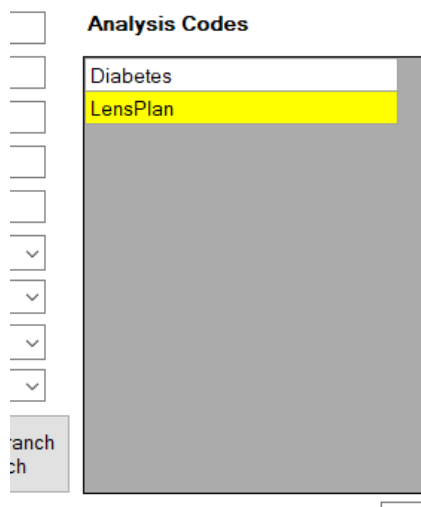On the front of the patient record there is a box which shows the analysis codes selected for this patient. Analysis codes are used as prompts to provide you with key information about the patient or marketing opportunities that patient may present.
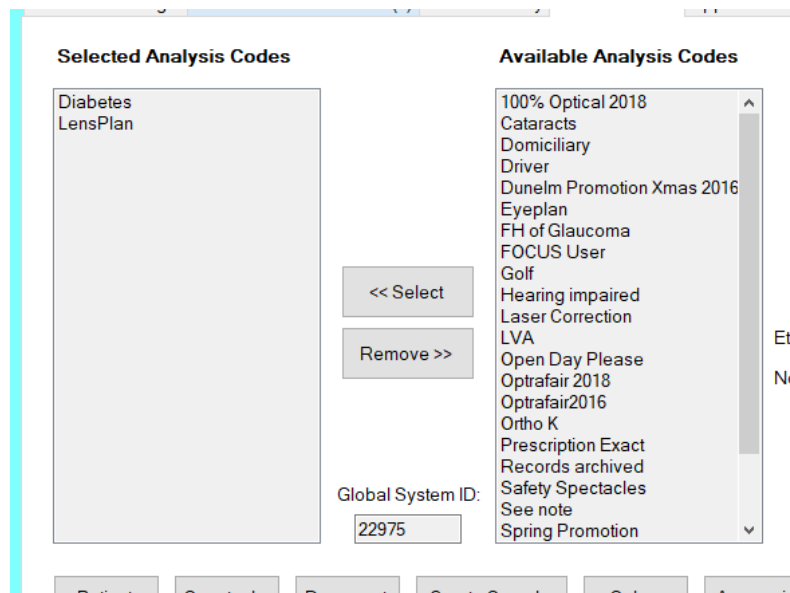

These analysis codes are listed in the marketing module and can be used for targeted marketing communications.

You can add or amend the analysis codes selected for a patient from the further details page of their record. You can access this page by clicking on the further details tab or by double clicking on the analysis codes box.

On the further details tab the selected analysis codes appear in the left-hand column and the available analysis codes are in the right-hand column.

To add an analysis code to the front of the patient it needs to be listed in the selected analysis codes column, you can either move it across from the right to the left by double clicking on the code or by highlighting it with a single click and then clicking on the 'select' button.

You can use the same double click to move the analysis code from the left to the right column so that it is no longer on the front record. You can also single click and then click the remove button.

Join Date	25/Apr/2006
NI Number	
Patient Source	Family Recommendation
Occupation	Accountant
NHS Number	
College	Details	N/A
CLs Stopped on	☐
Ethnicity	Unknown
Notes	

Also, on the further details screen is an automatically generated date of when the patient record was created.

Along with a free text field for NI number, NHS number and Notes. The notes section can be used for extra information that might need to be known about the patient such as a GP outside the area or the family member that has Glaucoma.

You also have several drop-down lists on the further details page like Occupation, College and Patient Source. Patient source; this is the reason the patient registered at the practice e.g. family recommendation.

CLs Stooped on, this box should be ticked when the patient stops wearing contact lenses. When this box is ticked the due date for the contact lens prescription on the front of the patient record is removed and replaced with the word stopped.

Appt Type	Last	Due	Recall
CL Visit	29 Jan 2018 - KD	Stopped	N/A
Eye Exam	15 Apr 2018 -	15 Apr 2019	12 months

Along the bottom of the further details screen are 6 buttons.

| Patient History | Spectacle History | Document History | Create Sample Merge Files | Sales Summary | Anonymise Patient |

Patient History

The patient history button shows a grid of the changes that have been made to the patient record. The top line shows the information that was on the patient record before the last change was made, the line below that shows the information on the patient record before the change was made and so on.

Spectacle History

The spectacle prescription button brings up a form that allows you to add and then subsequently view spectacle history that is not stored in the patients i-Clarity record. For example, for a new patient you could enter the prescription of a focimetered pair of the patient's spectacles they purchased elsewhere.

Type in the date (or approximate date) that the spectacles were purchased, select the condition of the spectacles from the drop-down list, and the spectacle type. Then type any notes you may want to write about the spectacles. Then click add. This will add a line into the grid, you can now double click on the prescription field to bring up the prescription fields.

Document History

The Document History button displays a grid of the documents that have been created from or stored against the patient record.

Create sample merge files

Create sample Merge files, this is used to create merge files that are used when creating documents that you want to link to the maintenance of i-Clarity.

Sales summary

The sales summary button is a quick way to access the sales summary report, by default it opens with today's date as the filter so that you can see today's sales so far.

Anonymise Patient

Anonymise Patient, this will remove all the data from the patient record that makes it identifiable. We do not recommend this is done until the patient record has been transferred into the archive branch.

Appointments Tab

The last tab along the top of the patient record is the appointment tab. Clicking on this will open the appointment page of the patient record. Here you will see a list of the appointments the patient has attended in the past, failed to attend or has booked. This can be useful when you want to see which practitioners the patient has seen or appointment types that patient has had in the past.