



Processing a Spectacle Order

i-Clarity Version 3.3.2

The spectacle order form for a patient can be opened by clicking on the orders icon at the bottom of the main patient form.



Or by clicking on the 'Go To Ordering' button on the patient account form.



The order form will open with the patient's most recent order on the screen.

Ordering - Mr John Brian Crossland (0 orders not collected)

All Orders
 Uncancelled Orders
 Unprocessed Orders
 Outstanding Orders
 Overdue Orders
 Uncollected Orders

7564 - Mr John Brian Crossland (14 Aug 201) v
 Just This Patient
 Filter By Supplier:

Order ID: Frame Order: Lens Order:

Ordered Date:
 Received and Checked Date:
 Collected Date:
 Fitted By:

Dispenser: Joanne Sweeney
 Receive Scheme: N/A
 Collect Scheme: N/A

ID: **RE/S7564** Tray: Required Date:
 Patient: Mr John Brian Crossland Expected Date: 19 August 2019
 Specs Type: Distance DbL: Box Width (A): Box Depth (B): ED:
 Order Type: Frame enclosed Frame: 000455 Case
 Workshop: Birchgrove Optical

Right Lens: Orma 1.5 Sph Cz Easy UV Stock 70 BVD: Blank Size: 65 Stock If Poss: Use Surfaced: Custom Desc:
 Left Lens: Orma 1.5 Sph Cz Easy UV Stock 70 BVD: Blank Size: 65 Stock If Poss: Use Surfaced: Custom Desc:

Lens Notes: Dispensing Notes:

Lenses From: Rec Frame From: Rec

	Sph	Cyl	Axis	Add	Dist Prism	Nr Prism	DVA	NVA
Right	+0.75	+0.00	0	0.00			6/9.5	10+
Left	+1.00	-0.75	80	0.00			6/7.6-	8+

D PD: Right 32.5 Left 32.5 NPD: Right 0.0 Left 0.0 Height: Right 0.0 Left 0.0 Direction: Right Above Rim Left Above Rim
 PD Nearest PD Exact Face Form Angle: Pantoscopic Tilt:
 Price Paid: £6.75 Working Distance (cm):

Changing which order is displayed

When you open an order the selection 'all orders' and 'just this patient' are selected with the most recent order displayed. To change which order is displayed you can either click on the drop-down arrow and select an alternative order from the list or use the arrows to flick through the patient's orders.

You can filter the orders that are displayed in the list by selecting a different order status.

Uncancelled orders are orders anywhere in the order process that have not been cancelled. Unprocessed Orders are orders that do not have a date in the order field i.e. are still waiting to be ordered. Outstanding Orders are orders that have an order date but have not been received and the required and expected date of the order are still in the future. Overdue orders are orders that have an order date, have not been received and the required or expected date is in the past. Uncollected orders are orders that have been received but not yet collected.

Removing the tick from the 'just this patient' filter will show orders of the selected status for all patients.

You can also search for, and display, a single specific order by typing the order ID, Frame Order number, or Lens order number in the corresponding fields and pressing enter on the keyboard.

Checking and printing an order

Check the details of the order are correct.

Order ID: RE/S7564 | Patient: Mr John Brian Crossland | Expected Date: 19 August 2019 | Frame Type: Unassigned

Specs Type: Distance | Order Type: Frame enclosed | Workshop: Birchgrove Optical

Right Lens: Orma 1.5 Sph Cz Easy UV Stock 70 | Left Lens: Orma 1.5 Sph Cz Easy UV Stock 70

	Sph	Cyl	Axis	Add	Dist Prism	Nr Prism	DVA	NVA
Right	+0.75	+0.00	0	0.00			6/9.5	10+
Left	+1.00	-0.75	80	0.00			6/7.6	8+

D PD: 32.5 | NPD: 0.0 | Height: 0.0 | Direction: Above Rim | Price Paid: £6.75

Order ID: RE/S7564 | Patient: Mr John Brian Crossland | Expected Date: 19 August 2019 | Frame Type: Unassigned

Specs Type: Distance | Order Type: Frame enclosed | Workshop: Birchgrove Optical

Right Lens: Orma 1.5 Sph Cz Easy UV Stock 70 | Left Lens: Orma 1.5 Sph Cz Easy UV Stock 70

	Sph	Cyl	Axis	Add	Dist Prism	Nr Prism	DVA	NVA
Right	+0.75	+0.00	0	0.00			6/9.5	10+
Left	+1.00	-0.75	80	0.00			6/7.6	8+

D PD: 32.5 | NPD: 0.0 | Height: 0.0 | Direction: Above Rim | Price Paid: £6.75

Confirm your order type is correct and amend if required. The available order type options are Supply frame, Reglaze enclosed, Frame enclosed, await receipt of frame, Prepare and Advise, Remote edging, repair enclosed, Uncut.

Order Type: Frame enclosed

Select the workshop. The workshop is considered the place that the job is finalised, therefore if you are ordering a remote edge or uncuts then the workshop is considered as your practice.

ID:	<input type="text" value="RE/S7685"/>	Tray:	<input type="text"/>
Patient:	<input type="text" value="Miss Kelly Carter"/>		
Specs Type:	<input type="text" value="Distance"/>		
Order Type:	<input type="text" value="Supply frame"/>		
Workshop:	<input type="text" value="Birchgrove Optical"/>		

ID:	<input type="text" value="RE/S7685"/>	Tray:	<input type="text"/>
Patient:	<input type="text" value="Miss Kelly Carter"/>		
Specs Type:	<input type="text" value="Distance"/>		
Order Type:	<input type="text" value="Remote edging"/>		
Workshop:	<input type="text" value="Cardiff Opticians"/>		

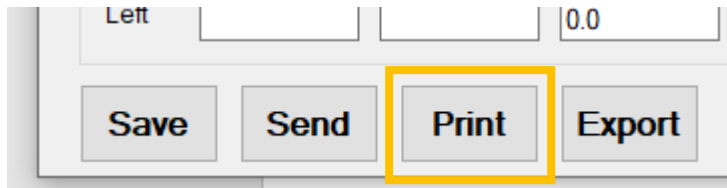
Lenses from: If you are ordering lenses from a separate supplier to the workshop, or you are doing a remote edge/uncut order, tick the box next to 'lenses from' and select the lens supplier.

Specs Type:	<input type="text" value="Distance"/>
Order Type:	<input type="text" value="Remote edging"/>
Workshop:	<input type="text" value="Cardiff Opticians"/>
Right Lens:	<input type="text" value="Core plastic Stock MAR coated"/>
Left Lens:	<input type="text" value="Core plastic Stock MAR coated"/>
Lens Notes:	<input type="text"/>
<input checked="" type="checkbox"/> Lenses From:	<input type="text" value="Rodenstock"/>

Frame From: If you are ordering a frame for this order that is not being supplied by the workshop, tick the box next to 'frame from' and select the frame supplier.

<input checked="" type="checkbox"/> Frame From:	<input type="text" value="Continental Eyewear"/>
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To generate an order, and generate a printout, click the print button.



This will open a new form with a print preview of the paper order.

Radyr Eyecare Glazing Order (029 2084 2255)

Cardiff Opticians (Phone: N/A / Fax: N/A)

Order ID: RE /S7685 Patient: Carter, Miss Kelly (ID 6271)
Date: 21 Aug 2020 Dispenser: Charlie Gibson
Required by: Remote edging Spec Type: Distance

Right Lens: BGC60 - Core plastic Stock MAR coated
Left Lens: BGC60 - Core plastic Stock MAR coated
Finishes: Misc Glazing Charge

Prescription	Sph	Cyl	Axis	Add	Dist. Prism	Near Prism
Right	-1.00					
Left	-0.75					

Click on the printer icon at the top of the form, select your printer and the number of copies you want to print.

This will print a paper order that can be sent with the frame and/or kept in the tray etc.

Clicking on the 'Print' button will have automatically entered an order date for this order.

Ordered Date: 21 August 2020

If the order is completed over the phone manually tick the box next to the order date.

Send and export. The send button will upload order information to the Hawkstone ordering platform, while the export button will export a file that can be imported into the Rodenstock winfit software. Please contact i-Clarity support if you would like to implement either of these features.

Order Numbers

A spectacles order can have up to three order references.

The reference for the workshop is located above the patient name.

The screenshot shows a form for creating a spectacles order. At the top, the ID field contains 'RE/S7685', which is highlighted by a yellow arrow. Below this, the Patient field contains 'Miss Kelly Carter'. The Workshop field is set to 'Cardiff Opticians'. The Right Lens and Left Lens fields both contain 'Core plastic Stock MAR coated'. At the bottom, the 'Lenses From' field is set to 'Rodenstock' and the 'Frame From' field is set to 'Continental Eyewear', both highlighted by yellow arrows. The form also includes fields for 'Expected Date' (12 August 2020), 'Order Type' (Remote edging), and various lens specifications like 'BVD', 'Blank Size', and 'Stock If Poss.'.

The reference for the lens and frame orders are located above their individual supplier selections.

Chasing an order

Spectacle orders have an expected date and possibly also a required by date.

Required Date:

Expected Date: 19 August 2019 ▾

The expected date is stored against the lens details in the maintenance of your i-Clarity but can be amended if necessary. A required date can be entered if the patient needs the spectacles by a certain date.

A spectacle order will be classed as overdue if the earliest of either of the required or expected date is in the past e.g. yesterday's date or older.

You can generate a list of orders that are overdue in either of the following ways:

Open the reports module of i-Clarity and click on the stock reports button.



Jobs on Order Report

As At: 21 August 2020

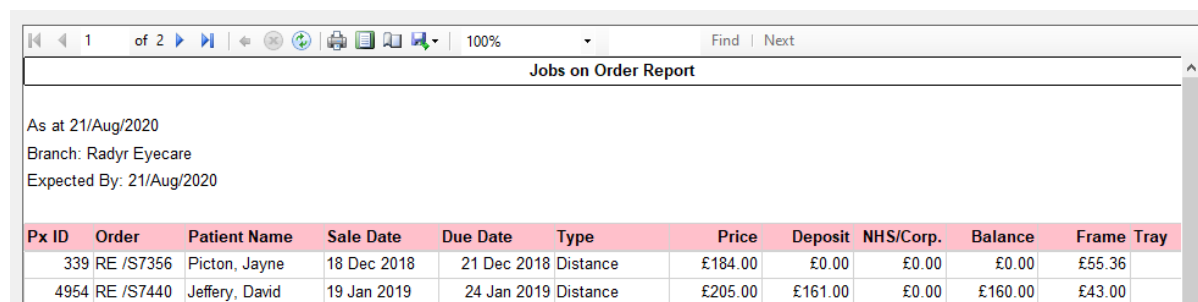
Due By: 21 August 2020

All Branches:

Jobs on Order Report

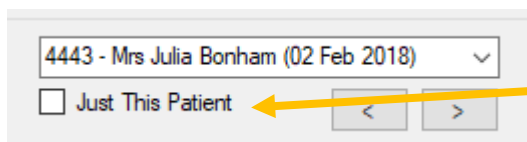
Jobs Awaiting Collection Report

Click on the 'Jobs on Order Report' button to create a list of all jobs on order. To filter this report so it only shows jobs due by a particular date, tick the 'Due By' date and select the date you would like to filter the report by.



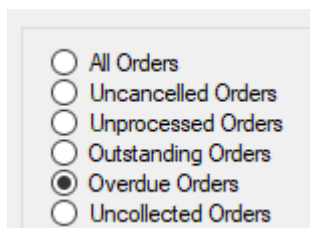
Px ID	Order	Patient Name	Sale Date	Due Date	Type	Price	Deposit	NHS/Corp.	Balance	Frame Tray
339	RE /S7356	Picton, Jayne	18 Dec 2018	21 Dec 2018	Distance	£184.00	£0.00	£0.00	£0.00	£55.36
4954	RE /S7440	Jeffery, David	19 Jan 2019	24 Jan 2019	Distance	£205.00	£161.00	£0.00	£160.00	£43.00

Alternatively, on the order form of any patient, unselect the 'just this patient' tick box.



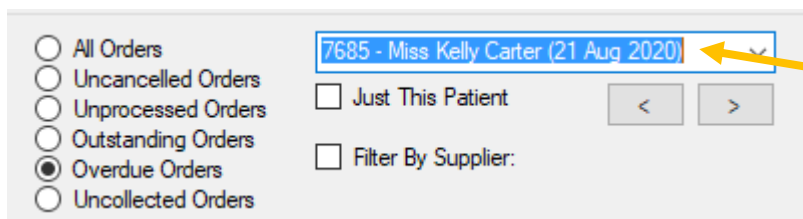
A screenshot of a patient selection dropdown menu. The dropdown is open, showing the selected patient: "4443 - Mrs Julia Bonham (02 Feb 2018)". Below the dropdown is a checkbox labeled "Just This Patient" which is currently unchecked. To the right of the checkbox are two navigation buttons: a left arrow and a right arrow. A yellow arrow points from the right towards the "Just This Patient" checkbox.

Select the status overdue.



A screenshot of a list of radio buttons for selecting order status. The options are: "All Orders", "Uncancelled Orders", "Unprocessed Orders", "Outstanding Orders", "Overdue Orders", and "Uncollected Orders". The "Overdue Orders" option is selected, indicated by a filled black circle next to it.

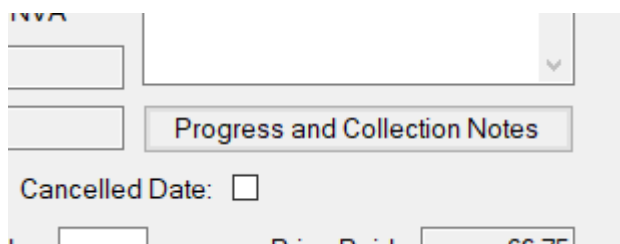
The drop-down list will now show a list of orders for any patient that is overdue.



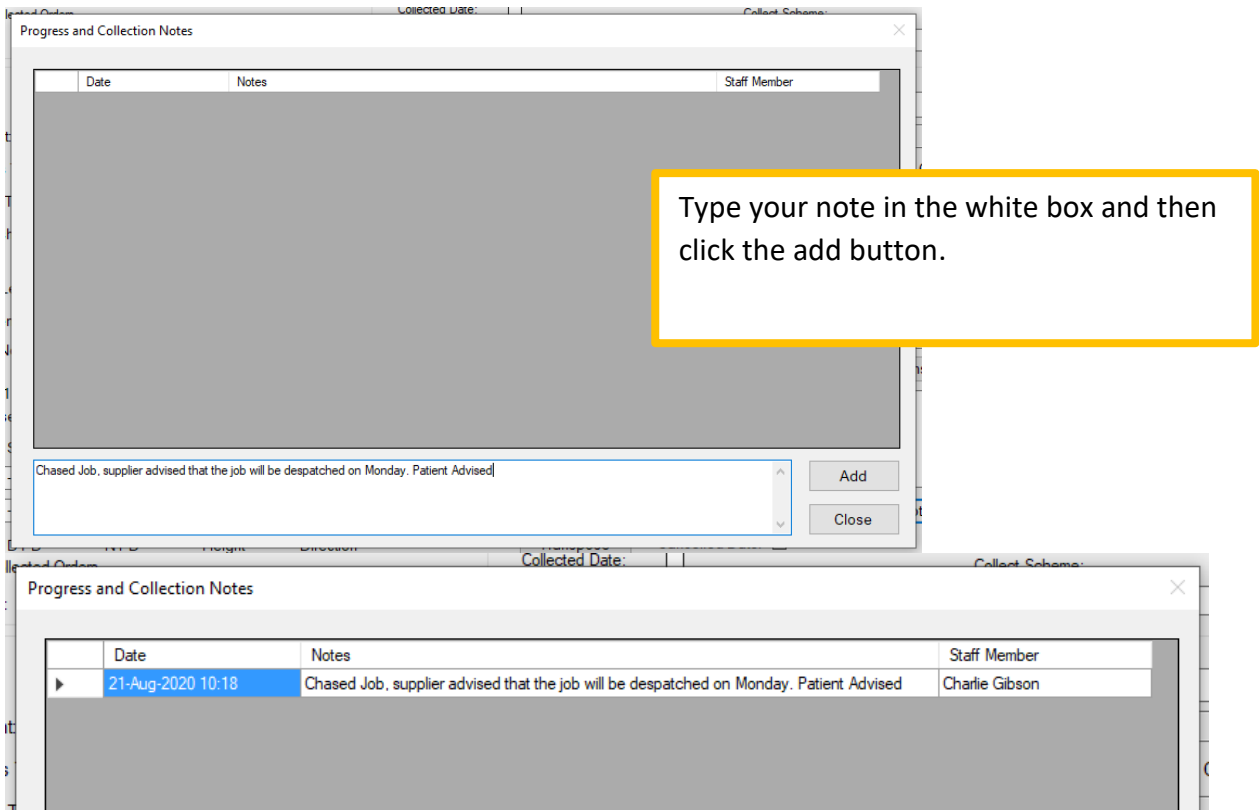
A screenshot of the order status selection interface. The "Overdue Orders" radio button is selected. To the right, a dropdown menu is open, showing a list of overdue orders. The selected order is "7685 - Miss Kelly Carter (21 Aug 2020)". Below the dropdown are checkboxes for "Just This Patient" and "Filter By Supplier:", both of which are unchecked. Navigation arrows are also present. A yellow arrow points from the right towards the dropdown menu.

Once you have chased an order, we advise you change the expected date to match the date the supplier has advised it will be arriving with you.

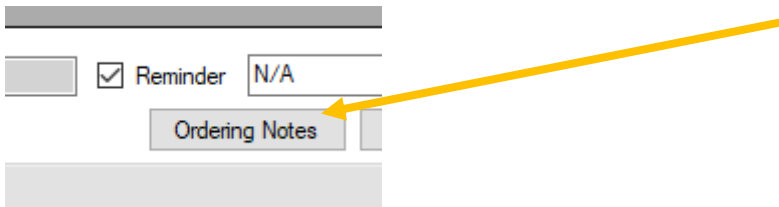
You can make a note of the update from the supplier by clicking on the 'progress and collection notes' button.



A screenshot of a button labeled "Progress and Collection Notes". Below the button is a field for "Cancelled Date:" with an unchecked checkbox. The background shows a blurred view of an invoice with some text like "Price Paid" and "66.75".



Notes entered onto the Progress and Collection area of the most recent order will also be available to view on the patient activity tab.



Checking and receiving an order

To mark an order as checked and received tick the box next to 'received and checked date:' this will automatically enter today's date which can be amended. The check and received by field will automatically populate with the name of the user logged in when the box is ticked.

Received and Checked Date:	<input type="checkbox"/>
By:	<input type="text"/>

You can also make a note to say the job is ready for collection through the 'progress and collection notes' button.

If you have an order that includes a separate lens and frame order you can receive them individually as they arrive by clicking on the 'Rec' button.

Ref. L51		Ref. F201	
<input checked="" type="checkbox"/> Lenses From:	Rodenstock	<input checked="" type="checkbox"/> Frame From:	Continental Eyewear
	<input type="button" value="Rec"/>		<input type="button" value="Rec"/>

Collecting an order

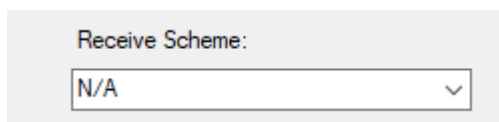
To mark an order as collected tick the 'collected date' box. This will enter today's date automatically, but this can be amended if necessary. The fitted by field will be automatically populated with the name of the user logged in.

Collected Date:	<input type="checkbox"/>
Fitted By:	<input type="text"/>

Spectacles dispense/order communication schemes

There are two types of spectacle communication schemes. A received scheme and a collected scheme. The received scheme is used to remind the patient that they need to collect their spectacles, and the collected scheme is used to follow up with patients after they have collected their spectacles.

If you have received schemes set up on your system, after ticking to say the spectacles have been received select the appropriate received scheme from the drop-down and click save.

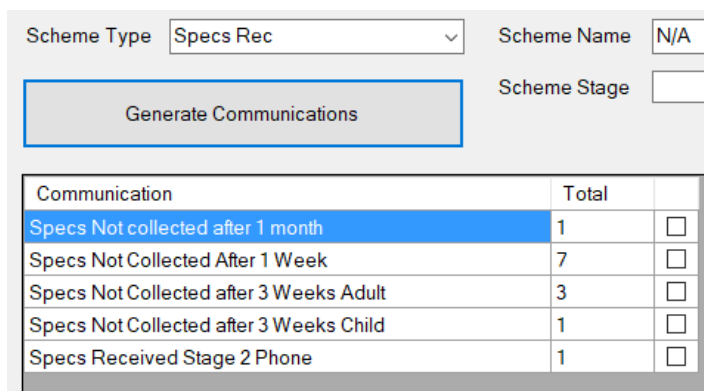


Receive Scheme:
N/A

The first communication will be generated automatically to advise the patient their spectacles are ready for collection. An SMS or email communication will be generated from the order screen. If the first communication is set up as phone, then an action point will be created so that there is a reminder in the days action list to call the patient.

Subsequent communications to remind the patient to collect are generated from the recall module.

They will be shown under the scheme type 'Specs Rec' and can be sent as part of your normal recall routine.

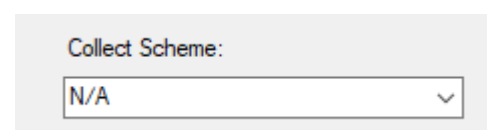


Scheme Type: Specs Rec | Scheme Name: N/A | Scheme Stage:

Communication	Total	
Specs Not collected after 1 month	1	<input type="checkbox"/>
Specs Not Collected After 1 Week	7	<input type="checkbox"/>
Specs Not Collected after 3 Weeks Adult	3	<input type="checkbox"/>
Specs Not Collected after 3 Weeks Child	1	<input type="checkbox"/>
Specs Received Stage 2 Phone	1	<input type="checkbox"/>

The received communications will stop as soon as the order is marked as collected.

If you have collected schemes set up on your system, after ticking to say the specs have been collected select the appropriated collected scheme.



Collect Scheme:
N/A

All collected schemes are generated through the recall module.