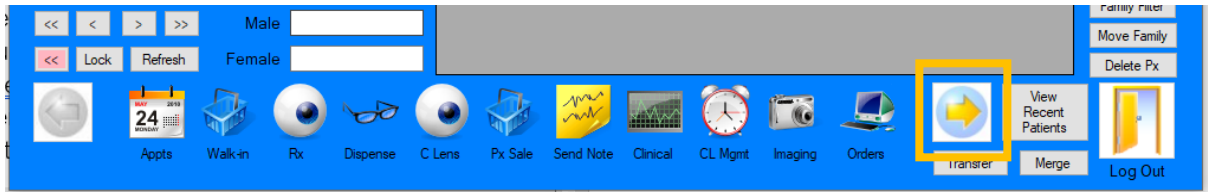


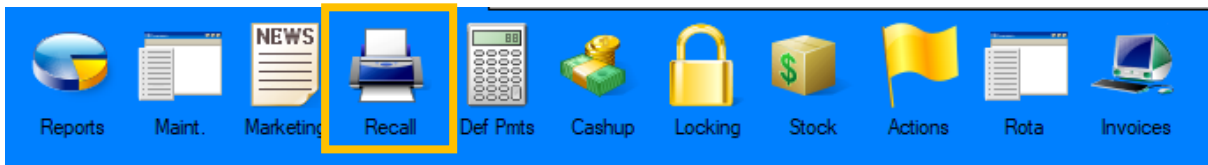


To access the area of the system where recall communications can be sent, click on the yellow arrow on the right-hand side of the module icons at the bottom of the page.



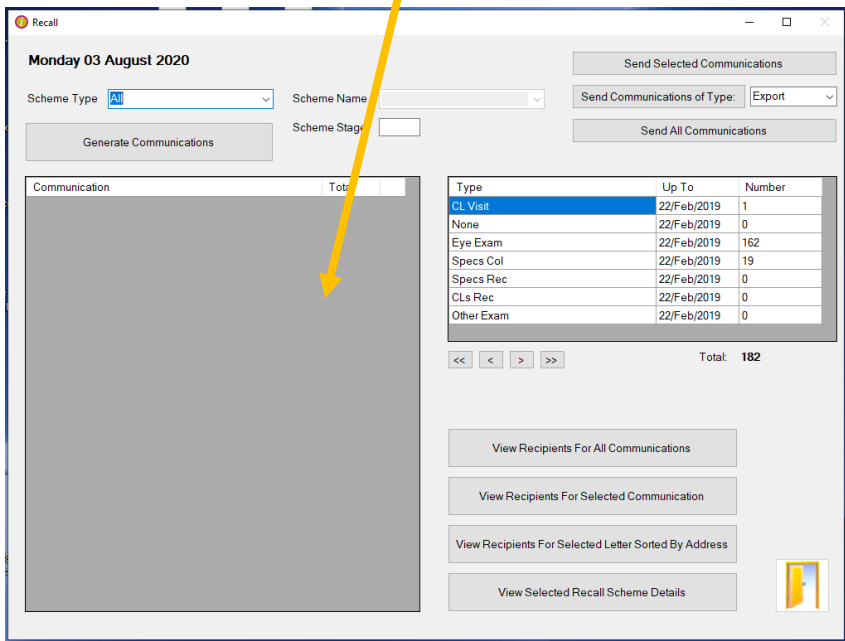
This will display a new set of icons.

Click on the printer icon called 'Recall'



Sending Recall Communications

Recalls that are due to be sent will be listed in the grey box on the left-hand side of the screen. When you first open this screen, the box will be empty.



To control what recall communications are displayed in this grey box firstly change the 'Up To' date in the list box on the left-hand side of the screen.

Type	Up To	Number
CL Visit	05/Dec/2014	15
None	05/Dec/2015	0
Eye Exam	07/Jan/2017	27
Specs Col	06/Jan/2015	7
Specs Rec	10/Jul/2014	1
CLs Rec	18/Aug/2015	0
Other Exam	07/Jan/2017	0

Total: 50

The up to date corresponds the communication send date in the patients communications tab.

Mr Tommy Parsons Patient Communications (2) Patient Activity Further Details Appointments Charlie Gibson 19 May 2020 12:56

Stop All Recalls

Last Booked Appointment: 27/10/2015
Next Booked Appointment:

Recall Schemes

- [CL] CL12
- [ST] 12 months
- [CL] CEC C Lens Wearer
- [CL] CL24
- [CL] CL6
- [CL] OS CL Wearers (Eyeplan)
- [CL] OS CL Wearers (Sauflon)
- [CL] OS CLs 1 Year
- [MISC] CL Trials 1st Time Wearer

Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	3	07/Feb/2017	12 months Stage 3
[CL] CL12	1	14/Nov/2020	CL12 Stage 1

Communications Sent Show Due Date

Therefore, if you wanted to send all the communications that were due to go out for the next month you would move the date to the end of the next month.

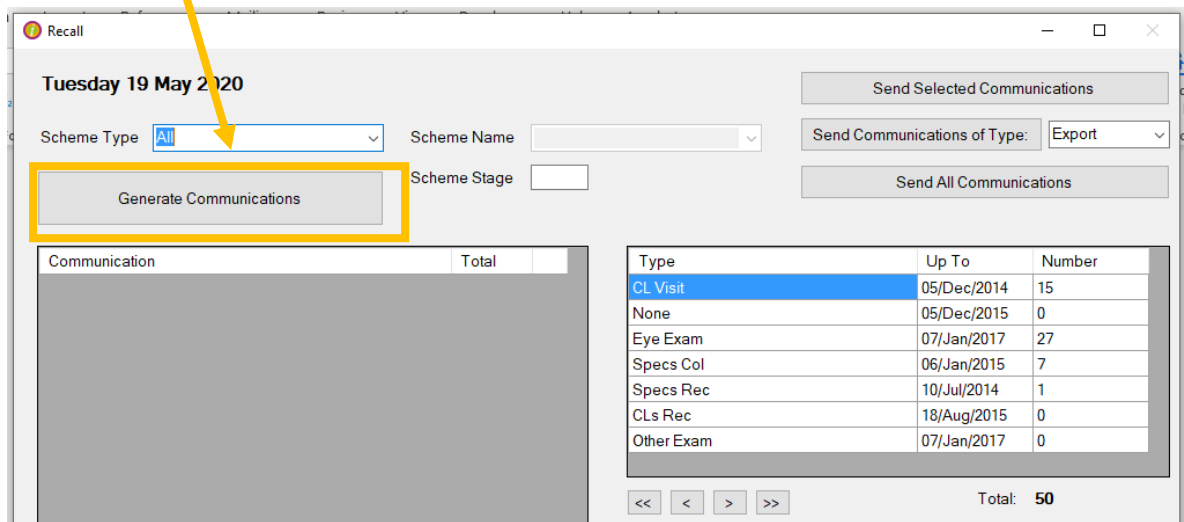
If you wanted to send out all the recall communications that were due up to today, then you would set the up to date to today's date.

Type	Up To	Number
CL Visit	05/Dec/2014	15
None	05/Dec/2015	0
Eye Exam	07/Jan/2017	27
Specs Col	06/Jan/2015	7
Specs Rec	10/Jul/2014	1
CLs Rec	18/Aug/2015	0
Other Exam	07/Jan/2017	0

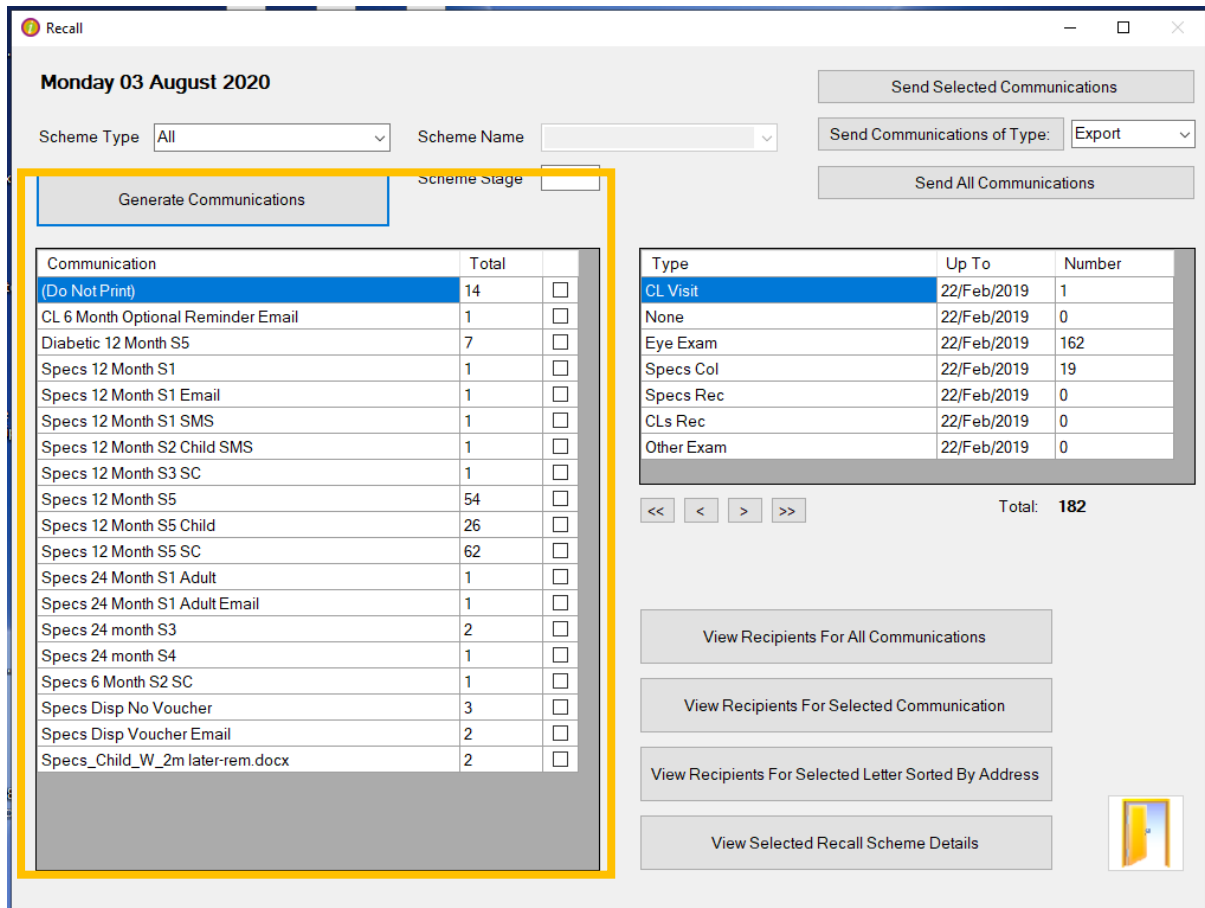
Total: 50

You can amend the 'Up To' date by either clicking in the date field until the date is highlighted and then overwrite with the new date. Or you can click on the arrows underneath the list. The single arrow moves all the dates in the list on a day from the dates shown. The double arrow moves all the dates on a week from the current date shown.

Then click generate

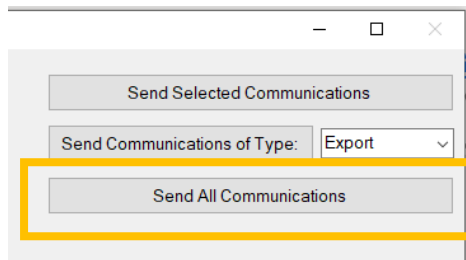


A list of communications will be displayed in the box with the number of recall letters due to be send for each communication.



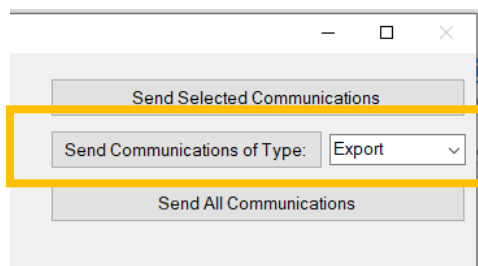
There are now several ways to send this list of generated communications.

1. Click 'Send all communications'



This will send all the communications listed in the box

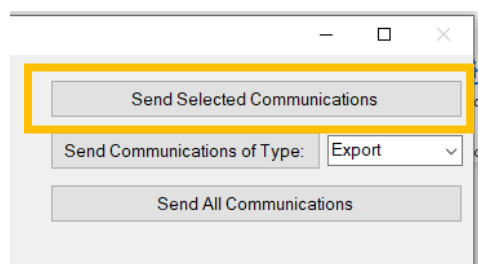
2. 'Send communications of type'



This will send the communications of one type e.g. SMS

Firstly, select from the drop down list the type of communication you would like to send. Then click 'send communications of type:'

3. Send selected communications



CL 6 Month Optional Reminder	5	<input type="checkbox"/>
CL 6 Month Optional Reminder Email	7	<input type="checkbox"/>
CL 6 Month Reminder Email	1	<input type="checkbox"/>
CL12 Stage 1 Adult Email	2	<input type="checkbox"/>
Diabetic 12 Month S1 SMS	1	<input type="checkbox"/>
Specs 12 Month S1	2	<input type="checkbox"/>
Specs 12 Month S1 Child	1	<input type="checkbox"/>

This will send the communications that have been preselected.

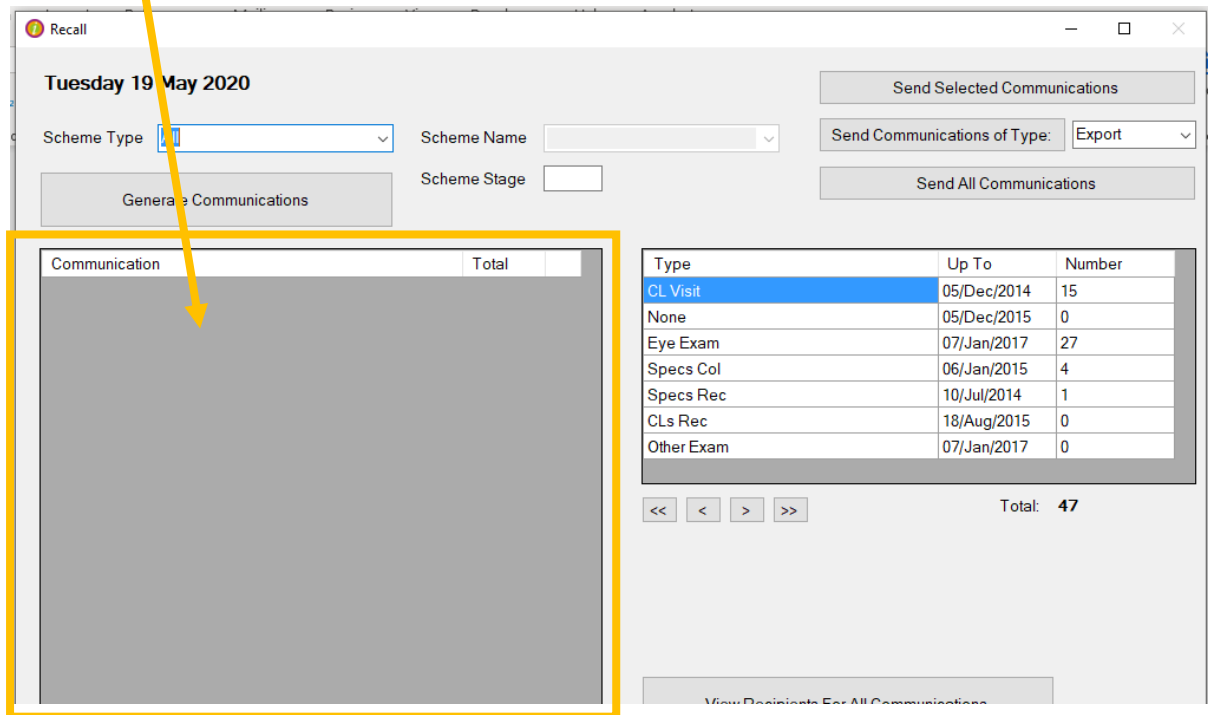
To select a communication or multiple communications select the tick box(es) next to the communication name.

Then press send selected communications

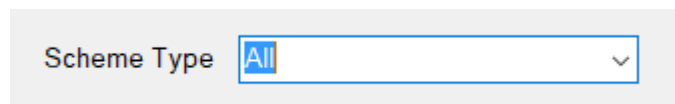
Other features of the recall screen.

Filtering the communication list

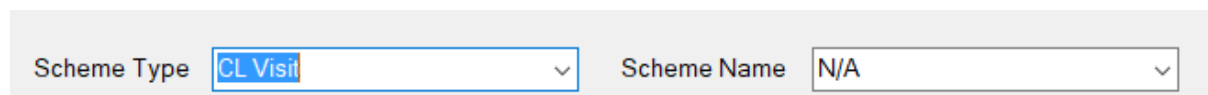
One feature of the recall module is you can filter the list of communications you generate in the grey box.



To do this select from the scheme type drop down the type of scheme you are interested in.

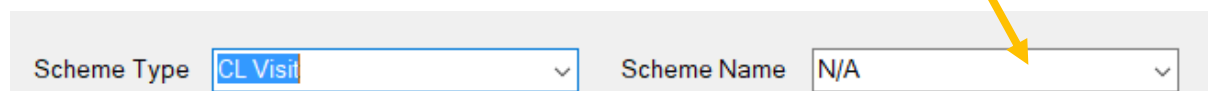


For example, CL Visit or Eye Exam



Selecting a Scheme Type will activate the next field Scheme Name.

You can either now click generate communications to see all communication for that type or you can break this selection down into a smaller list again. To do this after selecting the scheme type then select the scheme name before clicking generate communications.



You can also break down the list of communications by stage, for example stage 1 = first reminder, stage 2 = second reminder and so on.

To do this enter a number into the scheme stage box and then click generate.

Tuesday 19 May 2020

Scheme Type Scheme Name

Scheme Stage

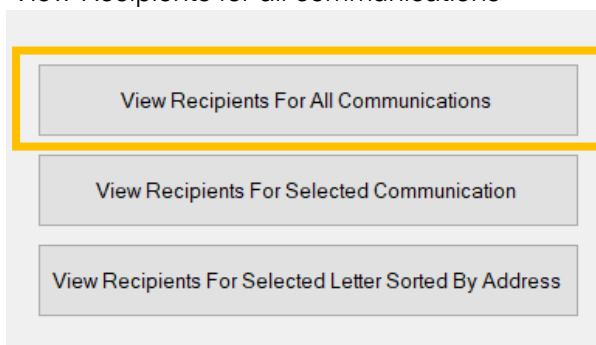
(Scheme stage filter can be done independent or in conjunction with scheme type and name.)

Viewing recipients of the communications

Another feature of the recall module is the ability to preview the recipients of the communications pending.

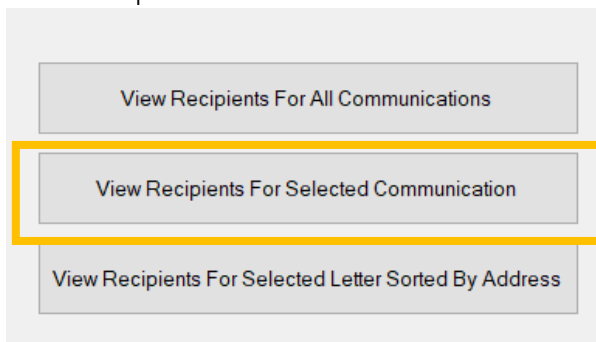
Along the bottom of the screen are 4 buttons.

1. 'View Recipients for all communications'



This will show a list of all the patients who have a communication in the list shown in the grey box

2. 'View Recipients for selected communications'

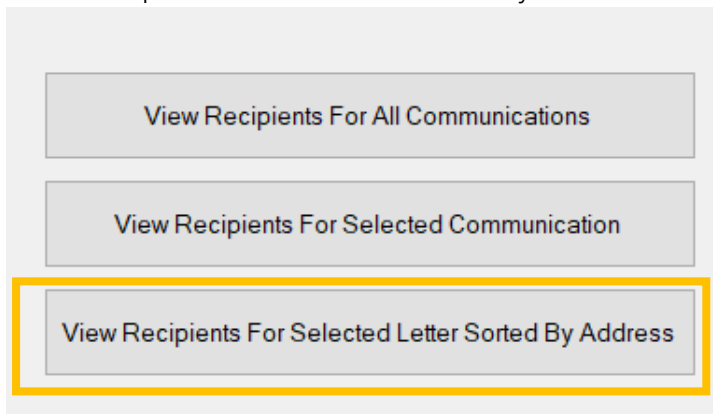


This will show a list of the patients who have a communication in the selected recall(s) in the grey box.

FHG 12 Month S1 Email	2	<input type="checkbox"/>
Specs 12 Month S1	2	<input type="checkbox"/>
Specs 12 Month S1 Child	1	<input checked="" type="checkbox"/>
Specs 12 Month S1 Email	4	<input checked="" type="checkbox"/>
Specs 12 Month S1 SC	4	<input checked="" type="checkbox"/>
Specs 12 Month S1 SC email	3	<input type="checkbox"/>
Specs 12 Month S1 SC SMS	1	<input type="checkbox"/>
Specs 24 Month S1 Adult	1	<input type="checkbox"/>

Selected Recalls

3. 'View receipts for selected letter sorted by Address'



Firstly, select a letter communication from the grid.

Then click 'View Recipients for Selected Letter Sorted by Address'

This will produce a report showing you all the

recipients with their addresses. Patients with the same address will be listed next to each other in the report.

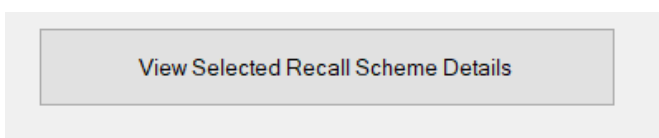
Viewing recall scheme detail

Clicking on the 4th button 'View Selected Recall Scheme Details' will show you the time in days between the recall communications of the individual scheme.

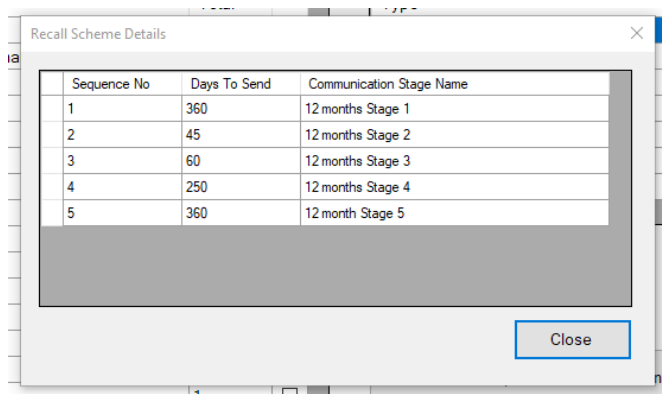
Select a communication from the left-hand column.

Diabetic 12 Month S5	7	<input type="checkbox"/>
Specs 12 Month S1	1	<input checked="" type="checkbox"/>
Specs 12 Month S1 Email	1	<input type="checkbox"/>

Then click the button 'View Selected Recall Scheme Details'



This will open a window that shows the recall scheme information



Important points

It is important that you find out how your i-Clarity recalls have been set up before you send recall communications. This is because it will allow you to select an appropriate 'Up to' date that is not too far into the future.

This is important for two reasons:

1. i-Clarity recall set up allows you to create a send date for each recall scheme. This send date is usually earlier than the patient's appointment due date.

Appt Type	Last	Due	Recall
Eye Exam	01 Sep 2020 - RW	01 Sep 2021	2 months

Patients next appointment due date

Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	1	20/Aug/2021	2 months Stage 1

Communication send date

For example, if you have a send date that is set up two weeks earlier than the appointment due date, and then you enter an 'Up to' that is two weeks in the future you will be sending recall communications four weeks early. This may not be appropriate for NHS patients.

2. When recalls are set up in i-Clarity they are given stages. Stage 1 is the first communication, if the patient doesn't respond to this 1st communication then they will move onto stage 2 communications and so on. The send date for 2nd and subsequent stages is calculated by taking the actual date the previous communication was sent and adding an assigned number of days to this date e.g. 45 days.

Communications Pending

Recall Scheme	Sequence No	Send Date	Communication Stage
[ST] 12 months	2	15/Aug/2019	2 months Stage 2

Date recall communication 1 was sent

Communications Sent

Recall Scheme	Sequence No	Date Sent	Communication
[ST] 12 months	1	08/Jul/2019	Specs 12 Month S1 Email

Send date of communication number 2

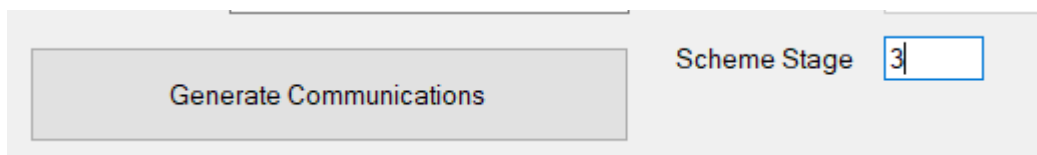
It is important that you know what the smallest assigned number is. The 'Up To' date in the recall module should not be set in the future by this number of day or more, because you will generate more than one recall communication for patients.

For example, if the smallest assigned number of days in the recall set up is 30 days and today's date is 1st September, the maximum future date that should be selected in the 'Up To' date of the recall module should be 29th September.

If you do need to set an 'Up To' date in the future because you need to be ahead of your recalls for any reason and you are concerned about sending patients more than one recall communication. You can use the Scheme Stage filter to prevent patients receiving multiple stage recalls.

Start by generating recalls for your last recall stage (this is listed in maintenance).

For example, if a system is set up with 3 recall stages you would enter the number 3 into the Scheme Stage field.



The image shows a screenshot of a software interface. On the left, there is a grey button labeled "Generate Communications". To its right, there is a label "Scheme Stage" followed by a dropdown menu. The dropdown menu is open, showing the number "3" selected.

Then click generate. This will send all the stage 3 communications already due in the system.

You would then enter the number 2 into the scheme stage field and generate and send the listed communications.

Because you have already sent the stage 3 communications the new stage 3 communications that are now pending will not get sent

You would then finally enter a number 1 into the scheme stage field and generate and send the first recall communications.