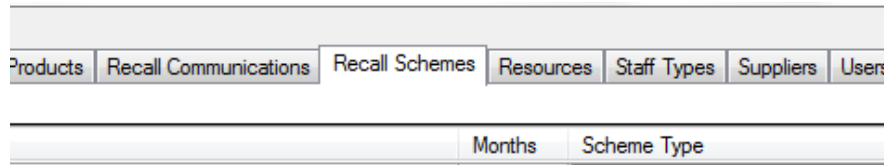
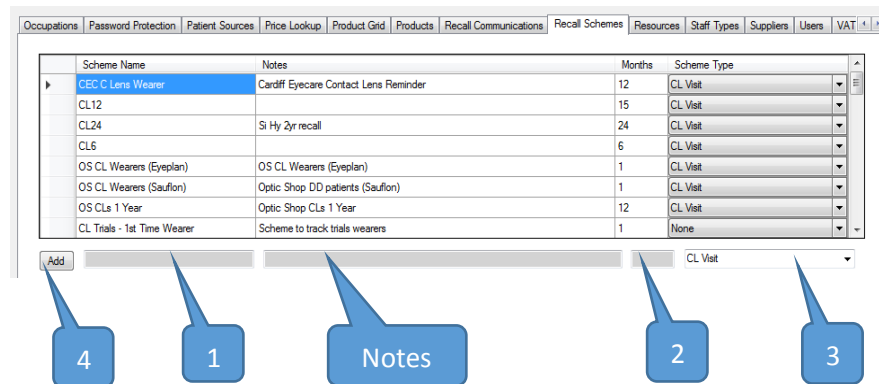


Setting up Received and Collected Spectacle Communications

- Go to the recall schemes tab in maintenance



- The first step to creating automatic communications for received and collected spectacles is setting up the recall scheme. This is done in the top section of the tab



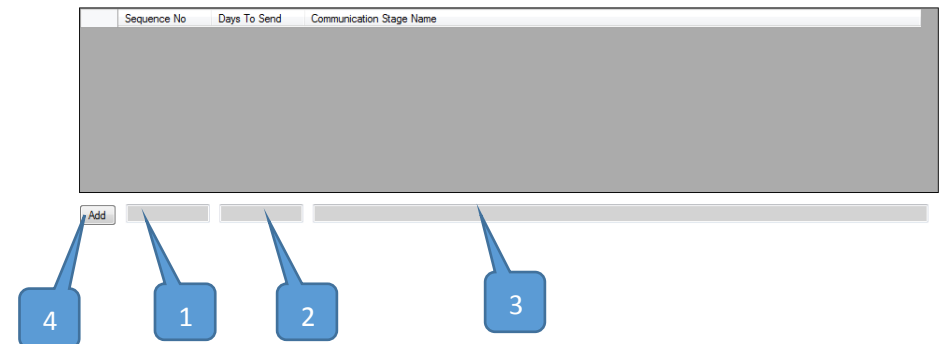
- Type in the name of your recall e.g. Specs received, Specs Collected, Specs Collected Varifocal.
 - Set Months as 0 for specs received schemes and the desired interval for specs collected.
 - Assign to Specs Received or Specs Collected in the drop down list of Scheme Types
 - Click Add
- n.b. You can add notes to the recall scheme if required. e.g. to be sent to adults and children

- The next step is to set up stages for each of the recall schemes.
- Recall Stages dictate the time between communications, so for specs received, 0 days on stage one means that as soon as the specs received box is ticked and the order saved a communication is due that day, if the patient does not complete the action of collecting the spectacles they will move to stage two at the time stated.

- Highlight the recall Scheme you would like to add stages too

| Sequence No | Days To Send | Communication Stage Name |
|-----------------|--|--------------------------|
| Follow Up Varts | Sends two communications to varifocal wearers | 1 |
| Collect Specs | Sequence sent to pax (and children) advising specs ready | 0 |
| Collect Varts | Sequence sent to pax (and children) advising specs ready | 0 |

- To add stages we use the bottom section of the recall Schemes tab.



- Enter the sequence number
- Enter the days to send
- Name the communication stage

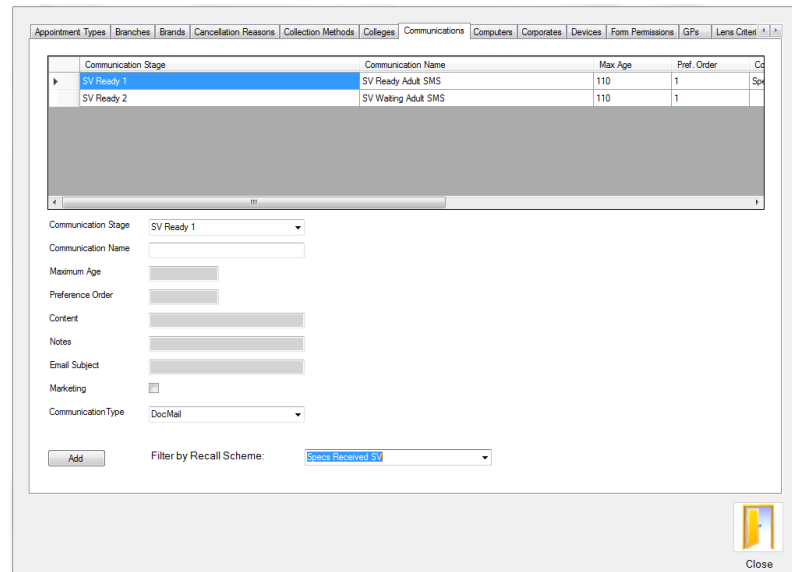
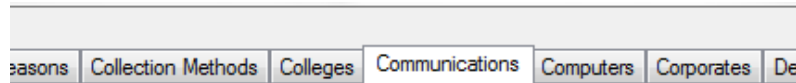
4. Click Add

5. Repeat until you have enough stages.

| | Sequence No | Days To Send | Communication Stage Name |
|---|-------------|--------------|-----------------------------------|
| | 1 | 0 | Specs Ready 1st Communication |
| | 2 | 7 | Specs Ready 1 Week |
| | 3 | 14 | Specs Ready 3 weeks |
| ▶ | 4 | 10 | Specs Not collected after 1 month |

Add

- Go to the communications tab (recall communications in 298)



- Select the recall scheme would like to add communications to from the Recall scheme filter list at the bottom.

Filter by Recall Scheme:

- Now in the Communication stage drop down list select the recall stage you would like to add a communication to.



- Type in the communication name

Communication Name:

n.b. If you are going to be sending the stage by more than one communication type and to more than one age group, it is recommended that you add the type name and age group into the communication name. For example 'Specs arrived U16 SMS'

- If you want to divide the stages into age groups enter the maximum age of the group

Maximum Age:

- Preference order is used when you are sending a communication by more than one method for example SMS, Email and Letter.

- Mark the communication with the type you would prefer to send as 1, if that type of communication is not available for that patient

e.g. you have email as preference 1 but the patient has not provided an email address i-Clarity will look to see if a communication can be sent by preference 2.

- A common set up of preference order in relation to type for specs received stage 1 is
 1. SMS
 2. Phone
- A common set up of preference order in relation to type for specs received stage 2.
 1. Email
 2. SMS
 3. Phone
- A common set up of preference order in relation to type for specs collected is
 1. Email
 2. Letter

- Type in the preference number of the communication

Preference Order

- If you are sending the communication by email then type in the Email subject you would like to use.

Email Subject

- Select from the communication drop down list the method of communication you would like to use.

Communication Type

3 months

- Your tab should now look similar to the below example

| Communication Stage | Communication Name |
|---------------------|--------------------------|
| SV Ready 1 | SV Ready 1 U16 SMS |
| Maximum Age | 15 |
| Preference Order | 1 |
| Content | |
| Notes | |
| Email Subject | |
| Marketing | <input type="checkbox"/> |
| Communication Type | SMS |

Filter by Recall Scheme:

- Click Add 

- The communication you have created will now appear in the top box of the tab.

| Communication Stage | Communication Name | Max Age | Pref. Order |
|---------------------|---------------------------|---------|-------------|
| 3 month stage 1 | 3 month stage 1 U16 Email | 15 | 1 |

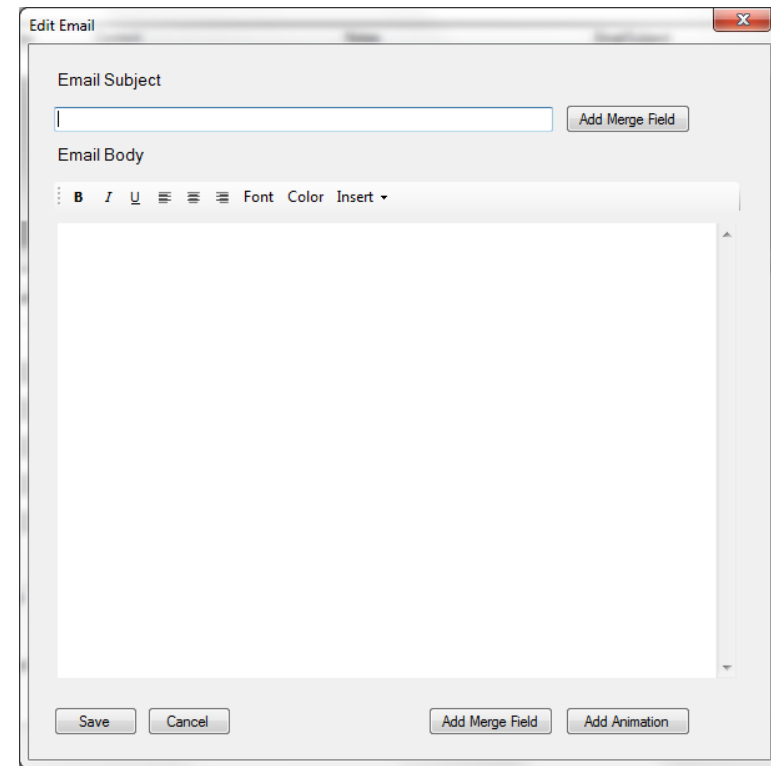
- Use the scroll bar to scroll across until the content box appears

| Max Age | Pref. Order | Content | Notes | EmailSubject |
|---------|-------------|---------|-------|---------------------|
| 15 | 1 | | | Eye Examination Due |

- Double Click on the blank content box
- A Splash Screen will appear.

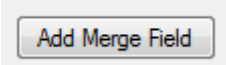
Scenario 1. You are adding a communication that is an email

- The following splash screen will appear after double clicking on the content box



The 'Edit Email' dialog box contains the following elements:

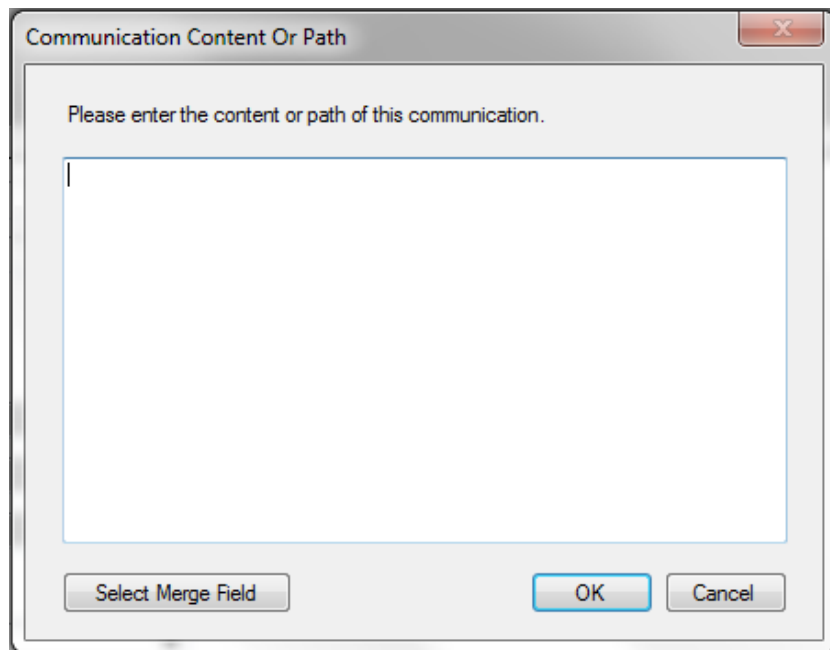
- Email Subject:** A text input field with an 'Add Merge Field' button to its right.
- Email Body:** A large text area with a rich text editor toolbar above it. The toolbar includes buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Font Color, and an Insert dropdown menu.
- Buttons:** 'Save', 'Cancel', 'Add Merge Field', and 'Add Animation' are located at the bottom of the dialog.

- Type or copy from word the content of your email
- Click on the  to enter any merge fields for your email.

n.b. if you have copied content from an existing recall letter from a word document the merge field will need to be changed and when you click on 'Add merge field' they will appear at the bottom of the email.

Scenario 2. You are adding a communication that is a text.

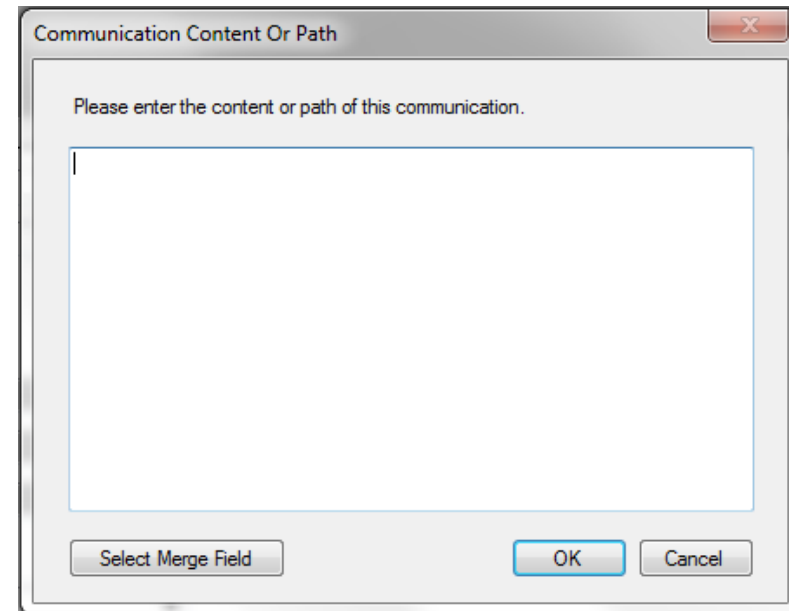
- The following splash screen will appear after double clicking on the content box



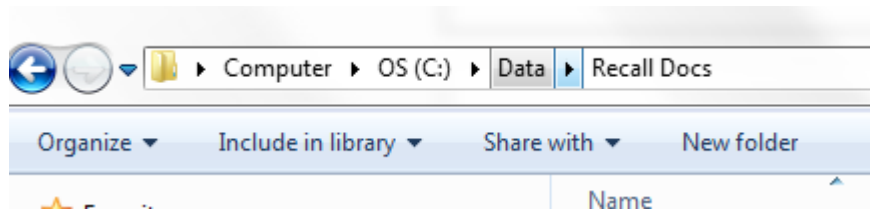
- Type in the content of your text message.

Scenario 3. You are sending a communication by letter

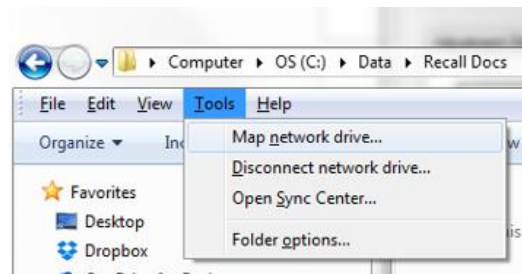
- The following splash screen will appear after double clicking on the content box.



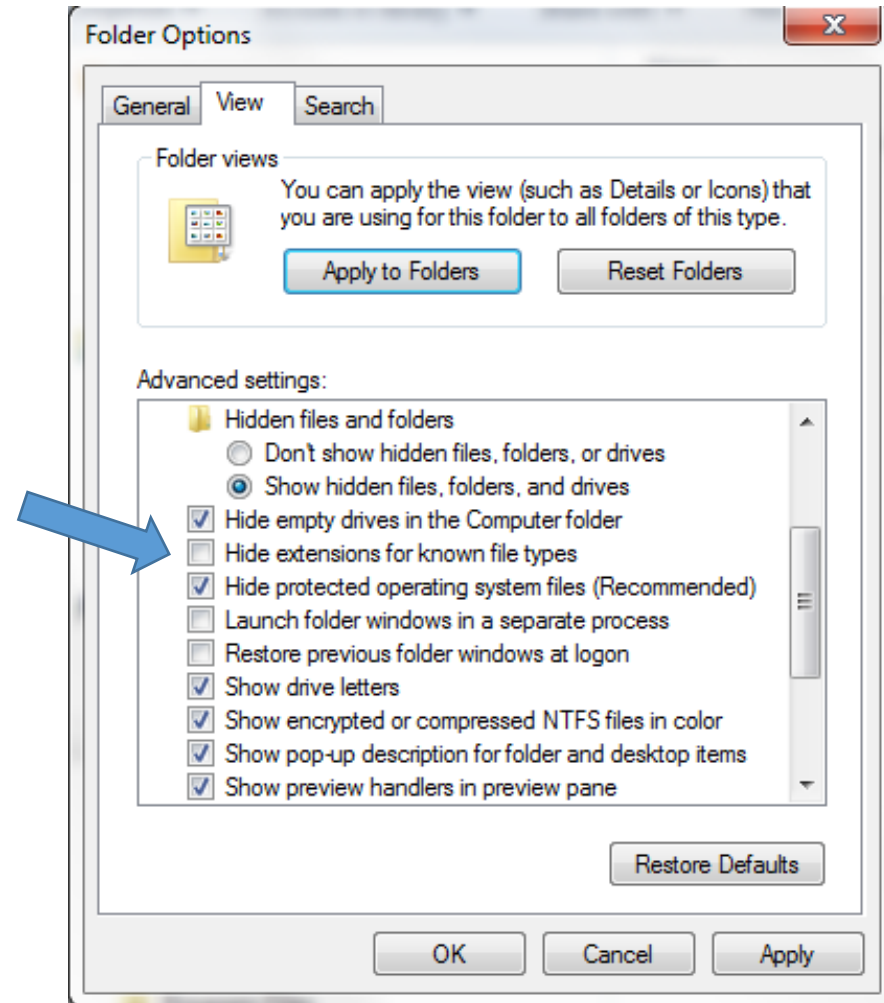
- Type in the name of the word document that you want to print off.
n.b. It must match the name of the document exactly including file extension. Your recall letters should be saved on your server in a folder called data or i-Clarity data. Then another folder called Recall docs.



Once you are in this folder press Alt and t on the key board. A drop down menu called tools will appear.



- Select folder options...
- A folder options box will appear
- Select the view tab in this box
- Scroll down half way through the list of options in view
- Untick the box related to 'Hide extensions for known file types'



- Now Copy the full name of the document and extension e.g. '3 month recall.doc'

- Paste this document name into the communication or content

Scenario 4. You want to communicate with the patient by phone

- The following splash screen will appear after double clicking on the content box.

- When the communication type is set to phone, the text written in this box will appear on an action point on the patient's record.

Please note.

- **Stage one of a received spectacles scheme is generated automatically without having to enter the recall module.**
- **All other stages of received spectacle schemes and all stages of Specs collected schemes are sent through the recall module.**