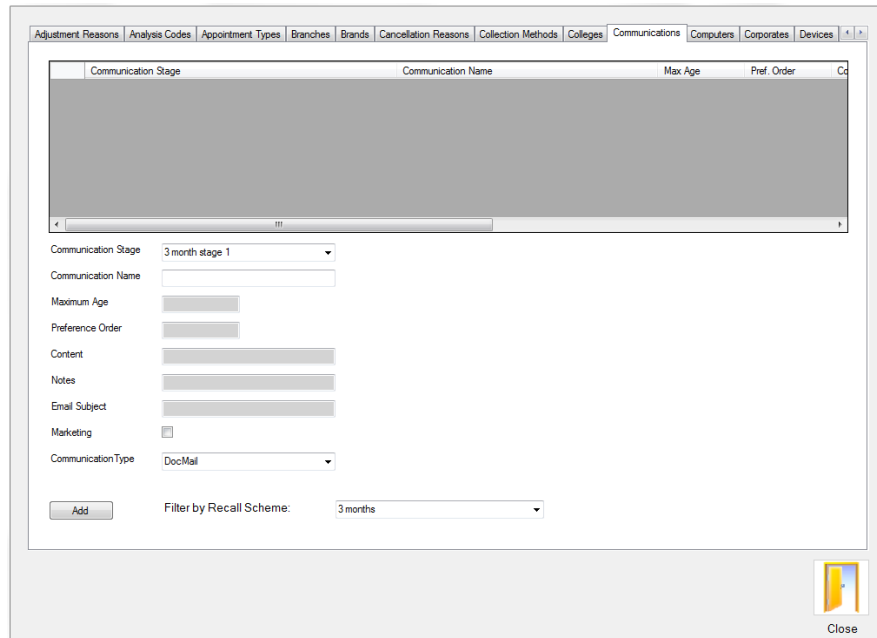


# Recall Communication

## Setting up a new recall communication

- Once you have set up your recall schemes and stages you then need to set up the communication.
- The communication defines the content of the recall the patient receives and how they receive the recall.
- It also allows you to breakdown each communication stage into age groups so that you can send different content to each group in different ways.
- Open maintenance and go to the communications tab (recall communications tab in version 297 and after)



- Select from the filter by recall scheme list at the bottom of the page the recall scheme you would like to add communications to.

Filter by Recall Scheme:

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

Communication Stage:   
 Communication Name:   
 Maximum Age:

- 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 '3 month stage 1 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 is
  1. Email
  2. SMS
  3. 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

- DocMail
- DocMail
- Email
- Letter
- Phone
- SMS

3 months

- Your tab should now look similar to the below example

Communication Stage	Communication Name

Communication Stage

Communication Name

Maximum Age

Preference Order

Content

Notes

Email Subject

Marketing

Communication Type

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

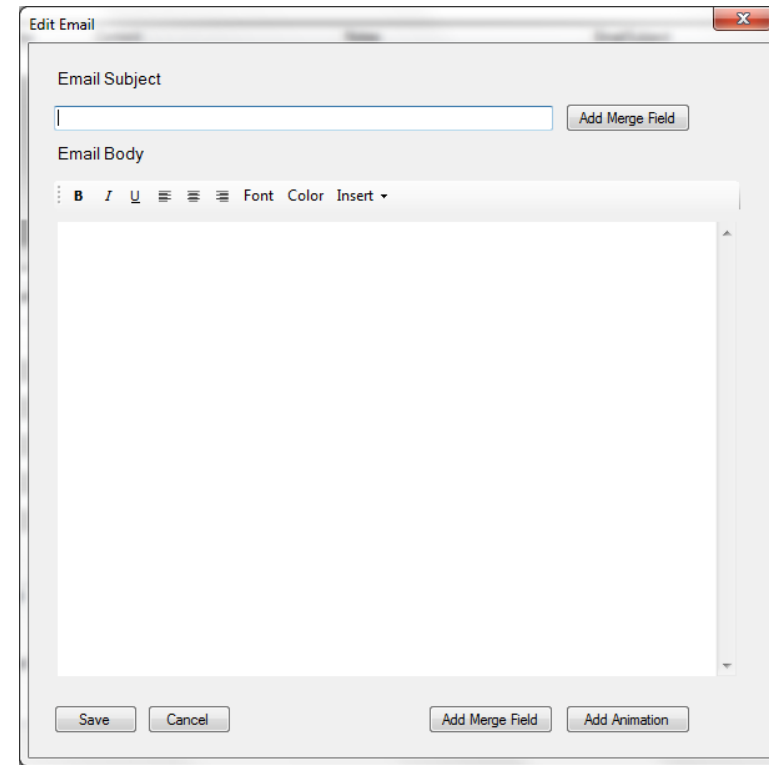
- Use the scroll bar to scroll across until the content box appears

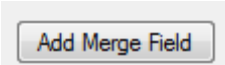
Max Age	Pref. Order	Content	Notes	Email Subject	Ma
15	1			Eye Examination Due	

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

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

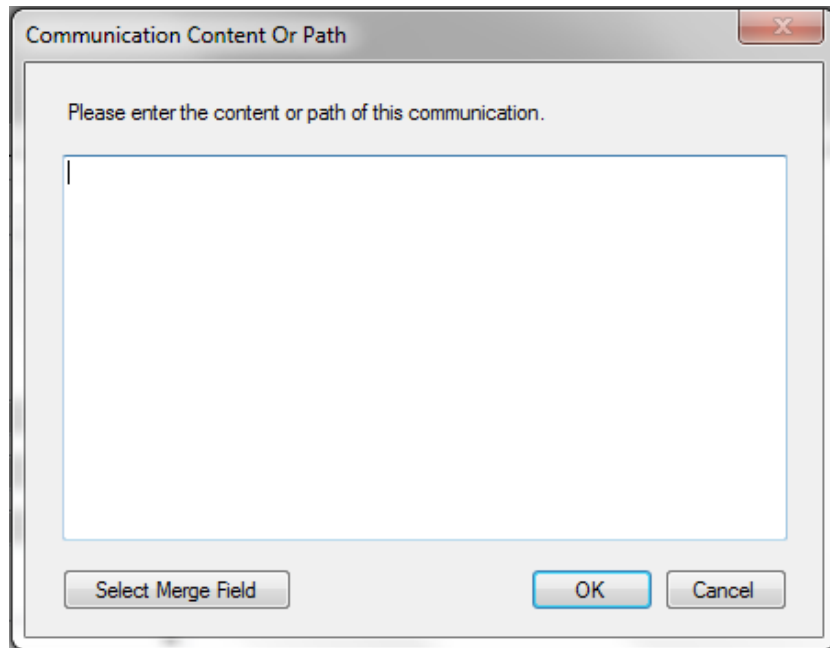
- The following splash screen will appear after double clicking on the content box



- 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 test.**

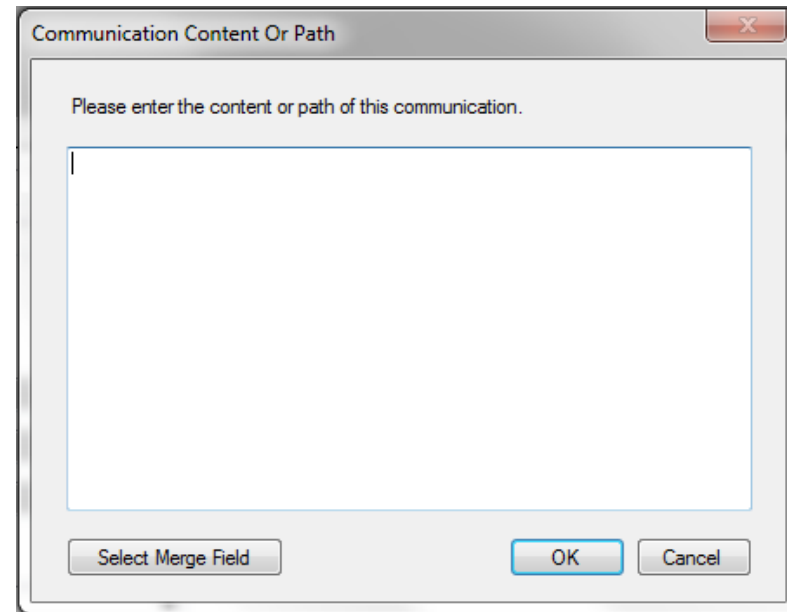
- The following splash screen will appear after double clicking on the content box



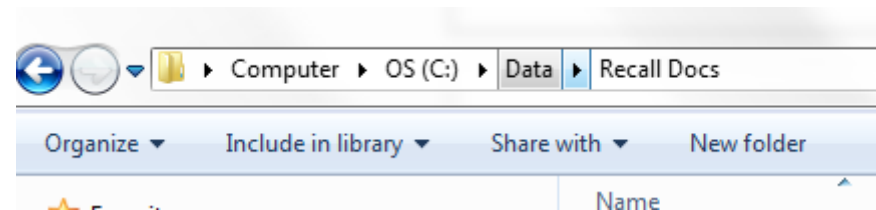
- Type in the content of your text message.

**Scenario 3. You are sending a communication by letter**

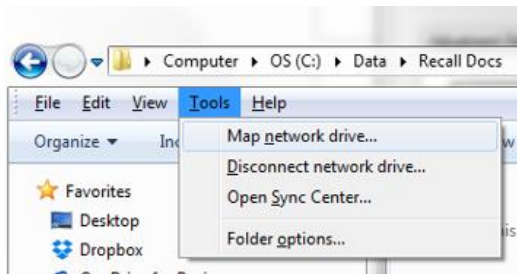
- The following splash screen will appear after double clicking on the content box.



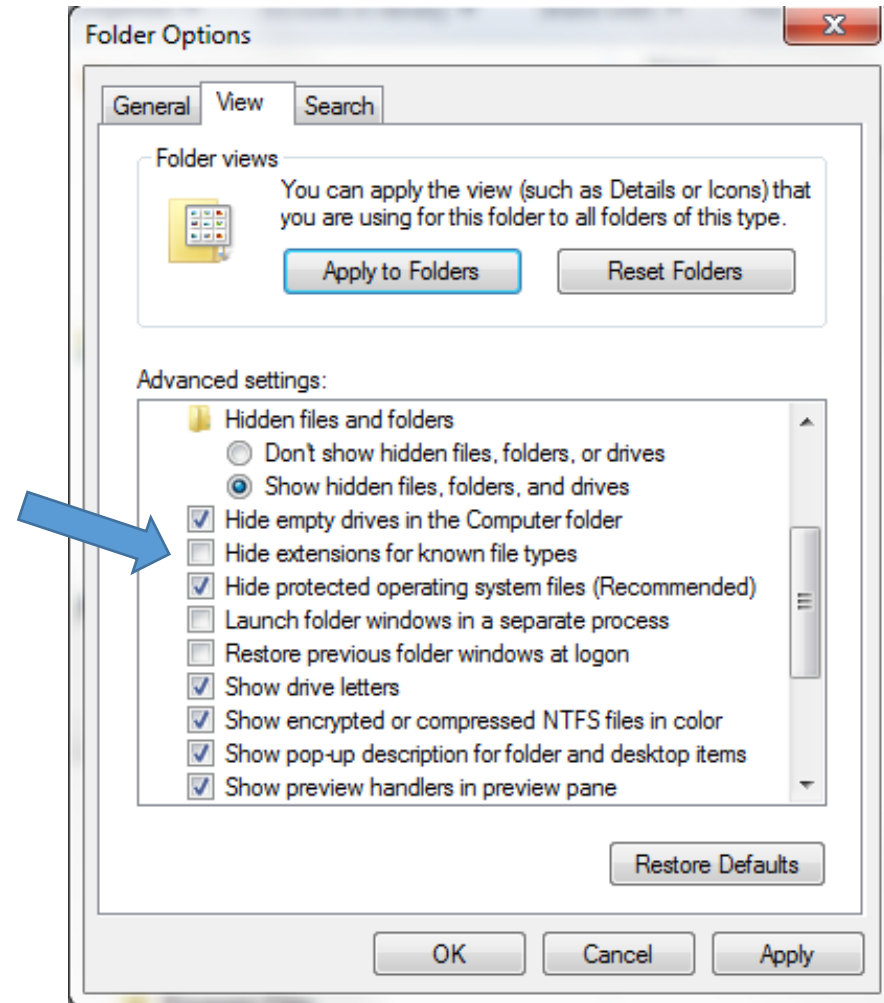
- Type in the name of the word document that you want to print off.  
n.b. It must match the name of the document exactly including file extension. You recall letters should be saved on you server in a folder called data or i-Clarity data. Then another folder called Recall docs.



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

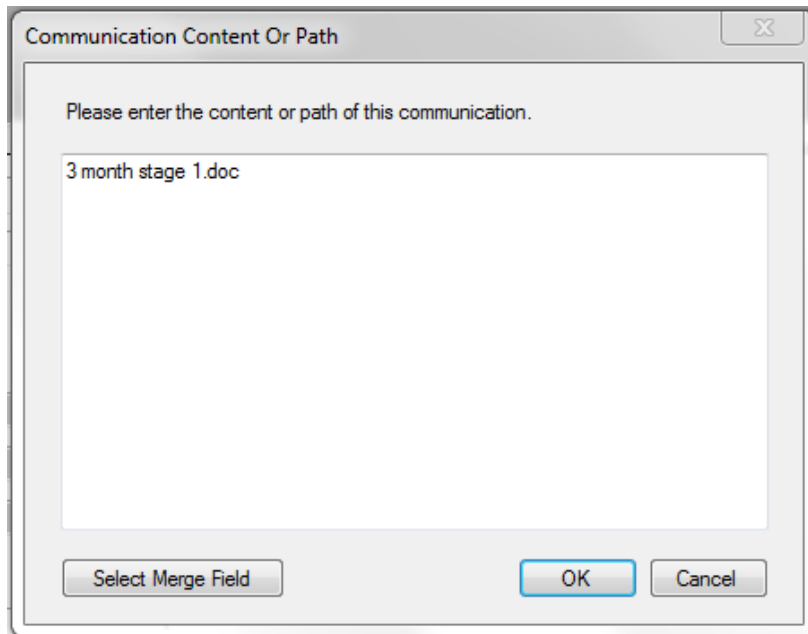


- Select folder options...
- A folder options box will appear
- Select the view tab in this box
- Scroll down half way through the list of options in view
- Untick the box related to 'Hide extensions for known file types'



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

- Paste this document name into the communication or content



The image shows a dialog box titled "Communication Content Or Path" with a close button in the top right corner. Inside the dialog, there is a text area containing the text "3 month stage 1.doc". Below the text area, there are three buttons: "Select Merge Field", "OK", and "Cancel".

## An example of a recall communication set up

Communication Stage	Communication Name	Max Age	Preference	Type
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U16 Email	15	1	Email
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U16 Letter	15	2	Letter
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U60 Email	59	1	Email
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U60 SMS	59	2	SMS
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U60 Letter	59	3	Letter
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U110 Email	110	1	Email
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U110 SMS	110	2	SMS
NHS Sight test 24 Stage 1	NHS Sight test 24 Stage 1 U110 Letter	110	3	Letter
NHS Sight test 24 Stage 2	NHS Sight test 24 Stage 2 U16 Letter	15	1	Letter
NHS Sight test 24 Stage 2	NHS Sight test 24 Stage 2 U60 SMS	59	1	SMS
NHS Sight test 24 Stage 2	NHS Sight test 24 Stage 2 U60 Letter	59	2	Letter
NHS Sight test 24 Stage 2	NHS Sight test 24 Stage 2 U110 SMS	110	1	SMS
NHS Sight test 24 Stage 2	NHS Sight test 24 Stage 2 U110 Letter	110	2	Letter
NHS Sight test 24 Stage 3	NHS Sight test 24 Stage 3 All Phone	110	1	Phone
NHS Sight test 24 Stage 4	NHS Sight test 24 Stage 4 U16 Letter	15	1	Letter
NHS Sight test 24 Stage 4	NHS Sight test 24 Stage 4 U60 Letter	59	1	Letter
NHS Sight test 24 Stage 4	NHS Sight test 24 Stage 5 U16 Email	110	1	Letter