

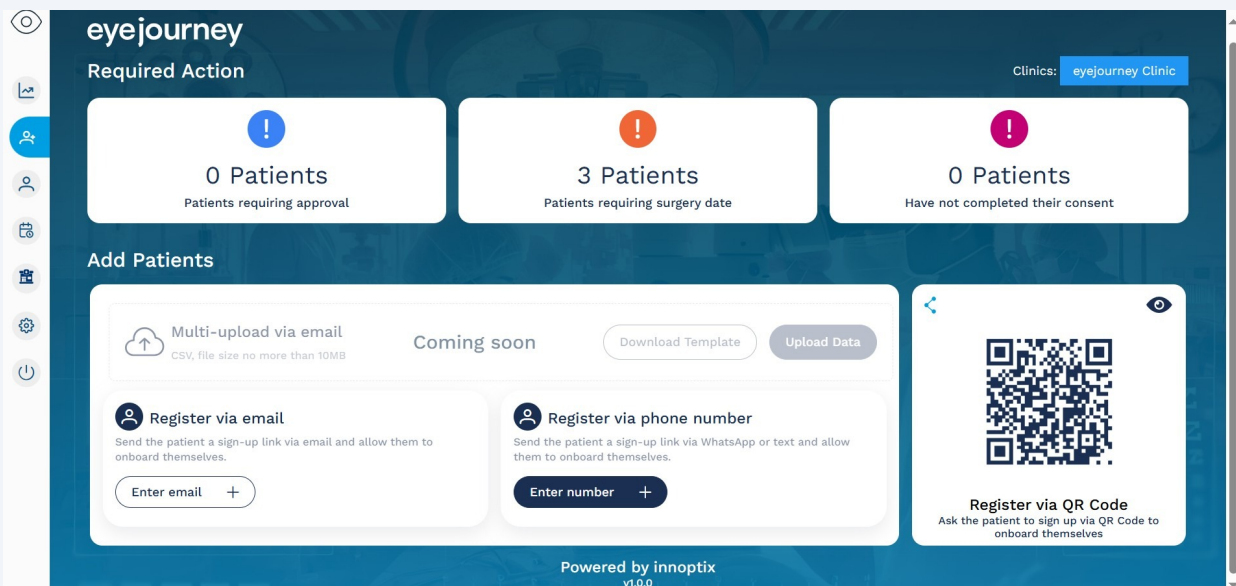
How To Add Patients In eyejourney platform

This guide provides a detailed walkthrough of the different methods of adding patients on the eyejourney platform, ensuring a smooth onboarding process. By following these clear, step-by-step instructions, users can efficiently navigate the platform, select the appropriate options for each patient, and manage their profiles with ease.

1 eyejourney Patient Introduction

We are now using a digital tool called eyejourney to help guide you through your treatment. It gives you clear, step-by-step information before and after your procedure — including videos and advice. You will get reminders, updates, and tips on your phone or email, so you always know what to expect and how to prepare. It's completely free and designed to make your experience easier and more reassuring. May I add your details to the system?

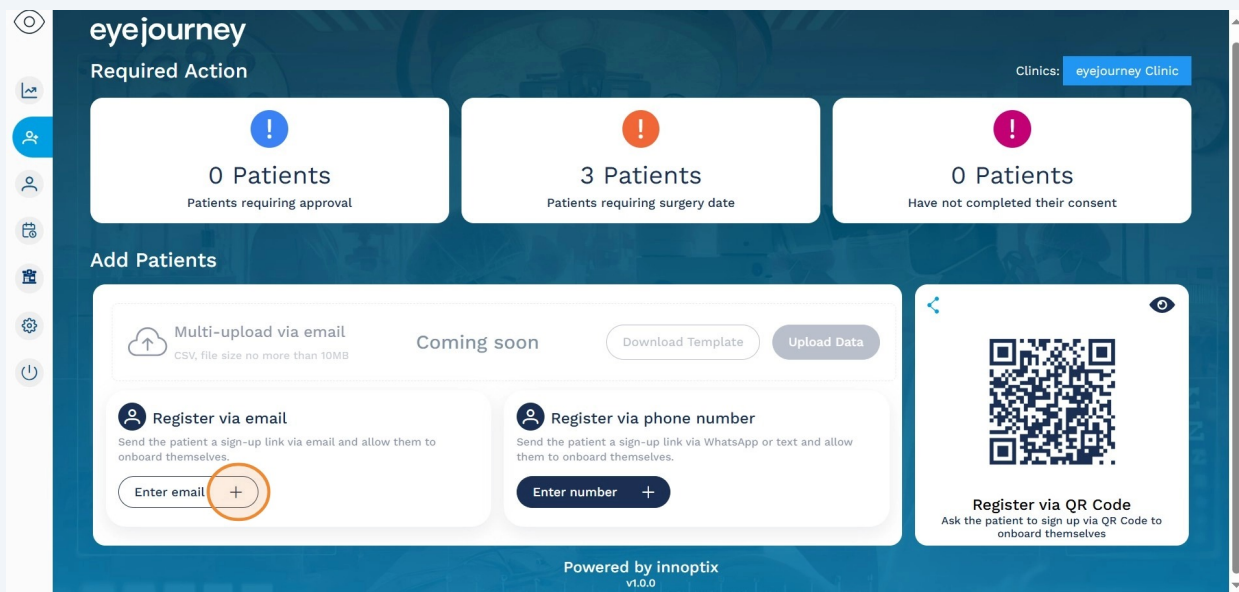
2 Navigate to [eyejourney](#) (AUS, NZ, South Africa), [eyejourney](#) (US), [eyejourney](#) (Rest of World)



3

There are three different methods in which you can add patients onto the eyejourney platform.

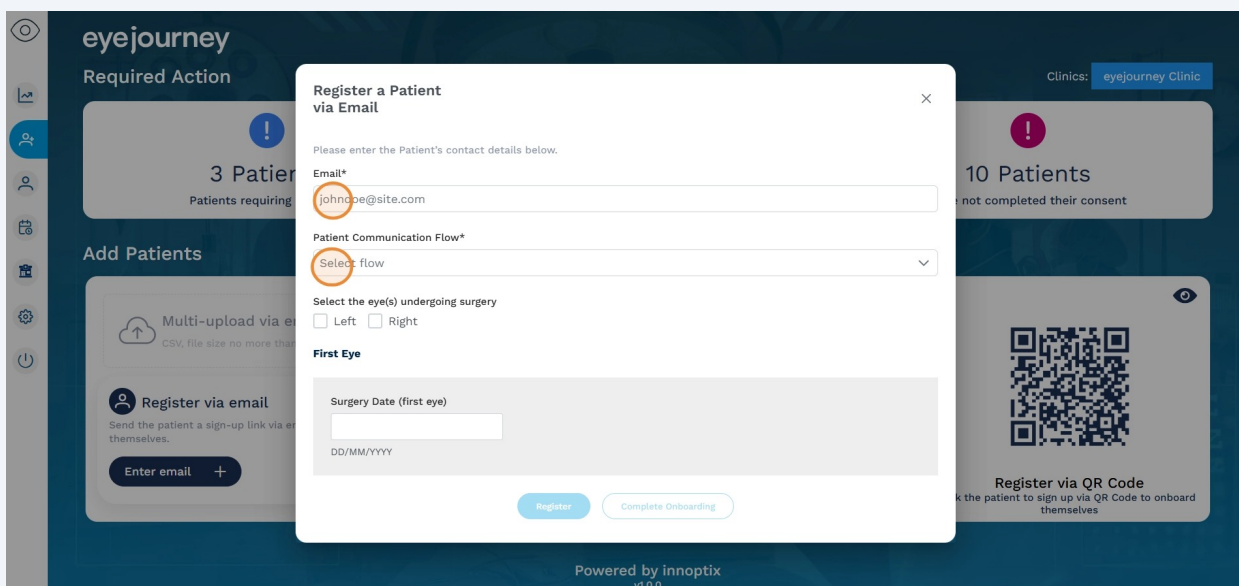
One method is registering them via email.



4

Enter the patients email address and what communication flow they are being register to.

You may have various different communication flows (e.g. Cataract Flow, Glaucoma Flow, Laser Flow) on your dashboard, be sure to onboard your patient on the required flow from the drop down list provided.



5 If procedure details are known, you may select which eye is undergoing surgery.

You may select both eyes here.

eyejourney
Required Action

3 Patients requiring consent

Add Patients

Multi-upload via CSV, file size no more than 10MB

Register via email
Send the patient a sign-up link via email themselves.

Enter email +

Register a Patient via Email

Please enter the Patient's contact details below.

Email*
johndoe@site.com

Patient Communication Flow*
Select flow

Select the eye(s) undergoing surgery
☐ Left ☐ Right

First Eye

Surgery Date (first eye)
DD/MM/YYYY

Register Complete Onboarding

Powered by innoptix v1.0.0

Clinics: eyejourney Clinic

10 Patients not completed their consent

Register via QR Code
Ask the patient to sign up via QR Code to onboard themselves

6 If only one eye is undergoing surgery, select the date this surgery is taking place.

eyejourney
Required Action

3 Patients requiring consent

Add Patients

Multi-upload via CSV, file size no more than 10MB

Register via email
Send the patient a sign-up link via email themselves.

Enter email +

Register a Patient via Email

Please enter the Patient's contact details below.

Email*
emilybrown@rayner.com

Patient Communication Flow*
eyejourney Flow

Select the eye(s) undergoing surgery
☒ Left ☐ Right

First Eye

Surgery Date (first eye)
DD/MM/YYYY

Left Eye IOL Details

Select IOL Manufacturer

Select IOL Type

Register Complete Onboarding

Powered by innoptix v1.0.0

Clinics: eyejourney Clinic

10 Patients not completed their consent

Register via QR Code
Ask the patient to sign up via QR Code to onboard themselves

7

If a surgery date is entered, you then must select that patient's surgeon from the list provided in the drop-down. This can be amended at a later date on the patient's profile if their surgeon changes.

You may also then select the IOL details (IOL Manufacturer and IOL Type), but this is not required.

The screenshot shows the 'eyejourney' app interface. A modal titled 'Register a Patient via Email' is open. The modal contains the following fields and options:

- Patient Communication Flow***: eyejourney Flow
- Select the eye(s) undergoing surgery**: ☒ Left ☐ Right
- First Eye**:
 - Surgery Date (first eye)**: 18/08/2025
 - Surgeon ***: Select surgeon (dropdown menu, highlighted with a red circle)
- Left Eye IOL Details**:
 - Select IOL Manufacturer (dropdown menu)
 - Select IOL Type (dropdown menu)
- Buttons: Register, Complete Onboarding

8

If both eyes are undergoing surgery, you will be asked if the surgery of both eyes are taking place on the same day.

Click 'Yes' if both eyes are taking place on the same day. Click 'No' if surgery of each eye is taking place on different days.

The screenshot shows the 'eyejourney' app interface. A modal titled 'Register a Patient via Email' is open. The modal contains the following fields and options:

- Patient Communication Flow***: eyejourney Flow
- Select the eye(s) undergoing surgery**: ☒ Left ☒ Right
- Will surgery for both eyes take place on the same day? ***: ☒ Yes ☐ No
- First Eye**:
 - Surgery Date (first eye)**: (empty field)
 - First Eye**: Select which eye (dropdown menu)
- Left Eye IOL Details**:
 - Select IOL Manufacturer (dropdown menu)
 - Select IOL Type (dropdown menu)
- Buttons: Register, Complete Onboarding

9

If the surgery for both eyes are taking place on the same day, you will be asked to enter only one surgery date and confirm the patients surgeon.

If known, you may enter which eye is to be operated on first from the drop down provided, although this is not required.

The screenshot shows a web application interface for 'evejourney'. A modal window titled 'Register a Patient via Email' is open. The form contains the following fields:

- Surgery Date (first eye):** A date input field showing '31/05/2025'. The date is circled in orange. Below the field is the placeholder text 'DD/MM/YYYY'.
- Surgeon *:** A dropdown menu showing 'Mike Testman'.
- First Eye:** A dropdown menu showing 'Left'.
- Left Eye IOL Details:** Two dropdown menus, the first showing 'Rayner' and the second showing 'RayOne Toric'.
- Right Eye IOL Details:** Two dropdown menus, both showing 'Select IOL Manufacturer' and 'Select IOL Type' respectively.

10

If the surgery for both eyes are taking place on different days, you will be asked to provide the dates of both surgeries, if known.

If known, you may enter which eye is to be operated on first from the drop down provided, although this is not required.

You may also provide IOL details for both eyes, if known.

The screenshot shows the 'eyejourney' application interface with a modal window titled 'Register a Patient via Email'. The background shows a sidebar with icons and a main area with sections like 'Required Action' (3 Patients requiring consent), 'Add Patients' (Multi-upload via CSV, Register via email), and 'Register via QR Code'. The modal form contains the following fields and options:

- Select the eye(s) undergoing surgery:** Two checkboxes, 'Left' and 'Right', both of which are checked.
- Will surgery for both eyes take place on the same day? ***: Two checkboxes, 'Yes' and 'No'. The 'No' checkbox is checked.
- First Eye:**
 - Surgery Date (first eye):** A date input field with a calendar icon and the placeholder 'DD/MM/YYYY'.
 - First Eye:** A dropdown menu with the text 'Select which eye' and a downward arrow.
- Second Eye:**
 - Surgery Date (Second eye):** A date input field with a calendar icon and the placeholder 'DD/MM/YYYY'.

At the bottom of the modal, it says 'Powered by imioptix v1.0.0'.

- 11 Click "Complete Onboarding" once all the required information has been entered.

Register a Patient via Email

Left Eye

Second Eye

Surgery Date (Second eye)

03/06/2025

DD/MM/YYYY

Left Eye IOL Details

Rayner

RayOne Toric

Right Eye IOL Details

Rayner

RayOne Toric

Register Complete Onboarding

- 12 You will be asked to confirm the patients consent and data usage at this point. Please confirm they are happy for eyejourney to contact them.

Register a Patient via Email

Please enter the Patient's contact details below.

Consent and Data Usage

Before entering a patient's details, you must confirm they are happy for us to contact them.

Please read this (or similar) to the patient:

"We'd like to add your contact details to our system so we can send you important educational information about your treatment, reminders, and consent forms. Is that okay?"

"Your information will only be used to support your care and will be processed securely in line with GDPR. You can read more here: [Privacy Policy](#)."

Verbal Consent Capture

☒ I confirm the patient has given verbal consent for their details to be entered into the system and for us to send them information about their care.

Continue

Register Complete Onboarding

13 You will then be prompted to enter some patient details:

- Title*
- First Name*
- Last Name*
- Sex assigned at birth*
- Date of Birth*

Once entered, please click "Next"

Personal Details

Providing your details helps us ensure you receive the right information at the right time throughout your treatment journey.

Title*
Miss ▼

First Name*
Emily

Last Name*
Brown

Sex assigned at birth*
Female ▼

Date of Birth*
26/01/1950
DD/MM/YYYY

Next

14

You will then be asked to provide your patient contact details. The patient must provide an email address in order to be onboarded onto eyejourney.

Please note a contact number is not required, but if not entered the patient will not receive text messages from eyejourney.

The screenshot shows a mobile application interface for 'eyejourney'. A white form titled 'Contact Details' is overlaid on a dark background. The form contains the following sections:

- Contact Details**
 - Text: "Prior to and after your surgery we will be sending you important information pertaining to your procedure.. Please enter your contact details below.."
 - Contact Number**: A text input field with a UK flag icon and "+44" prefix. The placeholder text "Enter your phone number" is visible. A red circle highlights the input field.
 - Email***: A text input field containing "emilybrown+example@rayner.com". A "Mail" button is to the right of the field.
- Additional Contact (Family/Friend/Carer)**
 - Text: "Would you like to provide the contact details of someone we can keep informed, such as a family member, friend, or trusted person?"
 - A toggle switch is shown in the 'off' position.
- How would you prefer to receive updates?**
 - Text: "Please let us know your preferred method for receiving important updates and reminders:"

The background shows parts of the app's sidebar with icons for home, search, and settings, and a QR code on the right side.

15

Your patient can also nominate an additional contact, such as a family member, friend, or carer. The patient will need to provide you with a Name, Contact Number and Email Address of their additional contact. They will also receive notifications from eyejourney.

The screenshot displays the 'eyejourney' app interface. A white form titled 'Additional Contact (Family/Friend/Carer)' is overlaid on a dark background. The form includes fields for 'Contact Number' (with a UK flag and '+44' prefix), 'Email*' (with a 'Mail' button), and 'Name'. Below these fields is a toggle switch, which is circled in orange and currently turned on. The text 'Would you like to provide the contact details of someone we can keep informed, such as a family member, friend, or trusted person?' is positioned above the toggle. At the bottom of the form, the text 'How would you prefer to receive updates?' is visible. The app's sidebar on the left contains various icons, and the background shows parts of the app's main interface, including a 'Clinic' button and a QR code.

eyejourney

Contact Number

+44 Enter your phone number

Email*

emilybrown+example@rayner.com Mail

Additional Contact (Family/Friend/Carer)

Would you like to provide the contact details of someone we can keep informed, such as a family member, friend, or trusted person?

☒

Name

Name

Contact Number

+44 Enter your phone number

Email

Email Mail

How would you prefer to receive updates?

16

Your patient can then provide you with their preferred method of contact, either Email or Text Message.

Please note, they will only be able to confirm Text Message if a contact number is provided.

The screenshot shows a mobile app interface for 'evejourney'. A white form is overlaid on a dark background. The form has a header 'evejourney' in a light blue font. Below the header, there is a section for 'Email*' with a text input field containing 'emilybrown+example@rayner.com' and a 'Mail' button. The next section is titled 'Additional Contact (Family/Friend/Carer)' and contains a question: 'Would you like to provide the contact details of someone we can keep informed, such as a family member, friend, or trusted person?'. Below this question is a toggle switch that is currently turned off. The final section is titled 'How would you prefer to receive updates?' and contains a question: 'Please let us know your preferred method for receiving important updates and reminders:'. Below this question are three radio button options: 'Email', 'Text Message', and 'WhatsApp (Coming Soon)'. At the bottom of the form are two buttons: 'Previous' and 'Submit'.

Email*

emilybrown+example@rayner.com Mail

Additional Contact (Family/Friend/Carer)

Would you like to provide the contact details of someone we can keep informed, such as a family member, friend, or trusted person?

☐

How would you prefer to receive updates?

Please let us know your preferred method for receiving important updates and reminders:

☐ Email

☐ Text Message

☐ WhatsApp (Coming Soon)

Previous Submit

17 Click 'Submit' once complete.

The patient will now be onboarded onto eyejourney, and will begin receiving notifications via their preferred method.

The screenshot shows a registration form for 'eyejourney'. The form is titled 'Additional Contact (Family/Friend/Carer)' and includes a section for 'How would you prefer to receive updates?'. The 'Submit' button is highlighted with an orange circle. The form also includes a 'Previous' button and a 'Mail' button. The background shows a dashboard with patient statistics and a QR code for registration.

Required Action

0 Patients requiring approval

16 Patients requiring surgery date

10 Patients Have not completed their consent

Multi-upload via email
CSV, file size no more than 10MB

Coming soon

Download Template

Upload Data

Register via email
Send the patient a sign-up link via email and allow them to onboard themselves.

Enter email +

Register via phone number
Send the patient a sign-up link via WhatsApp or text and allow them to onboard themselves.

Enter number +

Register via QR Code
Ask the patient to sign up via QR Code to onboard themselves

Powered by innoptix v1.0.0

18 Alternatively, you can register a patient via their phone number.

The screenshot shows the 'eyejourney' dashboard. The 'Required Action' section displays three boxes: '3 Patients requiring approval', '16 Patients requiring surgery date', and '10 Patients Have not completed their consent'. The 'Add Patients' section includes options for 'Multi-upload via email', 'Register via email', 'Register via phone number', and 'Register via QR Code'. The 'Enter number' button is highlighted with an orange circle. The background shows a sidebar with navigation icons and a QR code for registration.

Required Action

3 Patients requiring approval

16 Patients requiring surgery date

10 Patients Have not completed their consent

Add Patients

Multi-upload via email
CSV, file size no more than 10MB

Coming soon

Download Template

Upload Data

Register via email
Send the patient a sign-up link via email and allow them to onboard themselves.

Enter email +

Register via phone number
Send the patient a sign-up link via WhatsApp or text and allow them to onboard themselves.

Enter number +

Register via QR Code
Ask the patient to sign up via QR Code to onboard themselves

Powered by innoptix v1.0.0

19

Enter the patient's Contact Number and select the required Patient Communication Flow from the drop down provided.

Register a Patient via Phone

Please enter the Patient's contact details below.

Contact Number
 +44

Patient Communication Flow*
 Select flow

Select the eye(s) undergoing surgery *
☐ Left ☐ Right

First Eye

Surgery Date (first eye)

 DD/MM/YYYY

[Register](#) [Complete Onboarding](#)

20

This method of registration will follow the same as if you were to register the patient via email, as illustrated in the steps above.

Please follow steps 4-11 above on completing the required information.

Register a Patient via Phone

+44

Patient Communication Flow*
 eyejourney Flow

Select the eye(s) undergoing surgery *
☒ Left ☐ Right

First Eye

Surgery Date (first eye)

 DD/MM/YYYY

Left Eye IOL Details

Select IOL Manufacturer

Select IOL Type

21

If you wish for your patients to complete their personal details, click 'Register' as opposed to 'Complete Onboarding'.

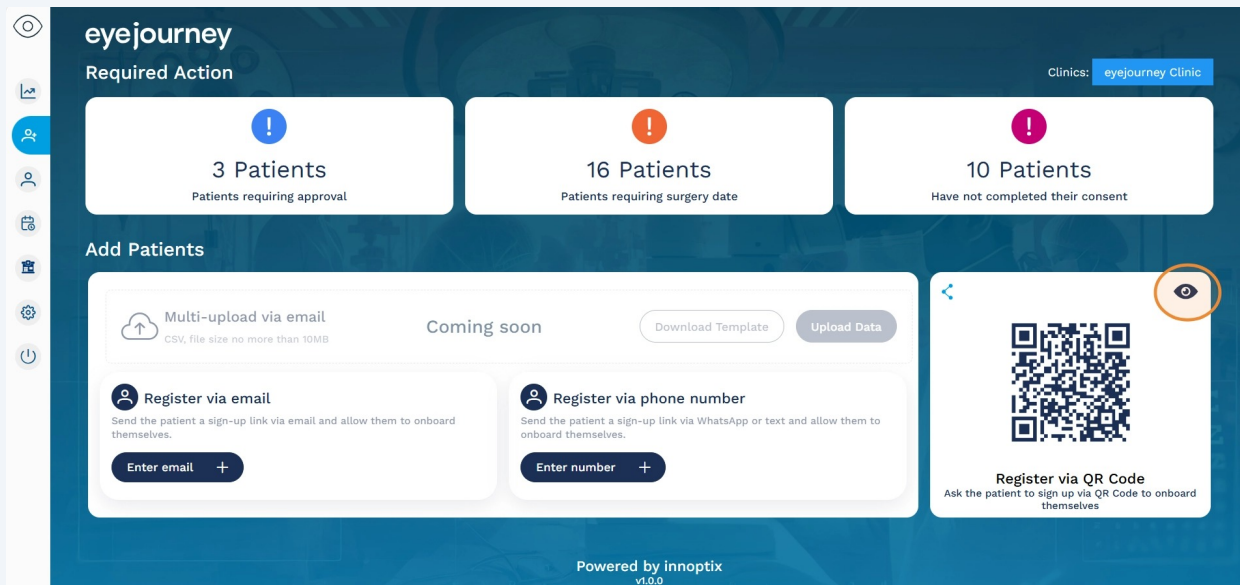
The patient will then be shared an SMS or Email (depending on whether they were registered via email or SMS) with steps to complete their onboarding, prompting them to provide their personal details and an additional contact, if desired.

This step applies to both adding a patient via email or phone number.

The screenshot shows a web application window titled "Register a Patient via Phone". On the left is a dark sidebar with icons for a person, a magnifying glass, a calendar, a building, a gear, and a power button. The main content area has a white background. At the top, there's a dropdown menu with "Left" selected. Below that is a section titled "Second Eye" containing a "Surgery Date (Second eye)" field with the value "07/06/2025" and a placeholder "DD/MM/YYYY". Underneath are two sections: "Left Eye IOL Details" and "Right Eye IOL Details". Each section has two dropdown menus. In the "Left Eye IOL Details" section, the first dropdown is "Rayner" and the second is "RayOne Toric". In the "Right Eye IOL Details" section, the first dropdown is "Rayner" and the second is "Sulcoflex Aspheric DUET". At the bottom of the form are two blue buttons: "Register" and "Complete Onboarding". The "Register" button is circled in orange.

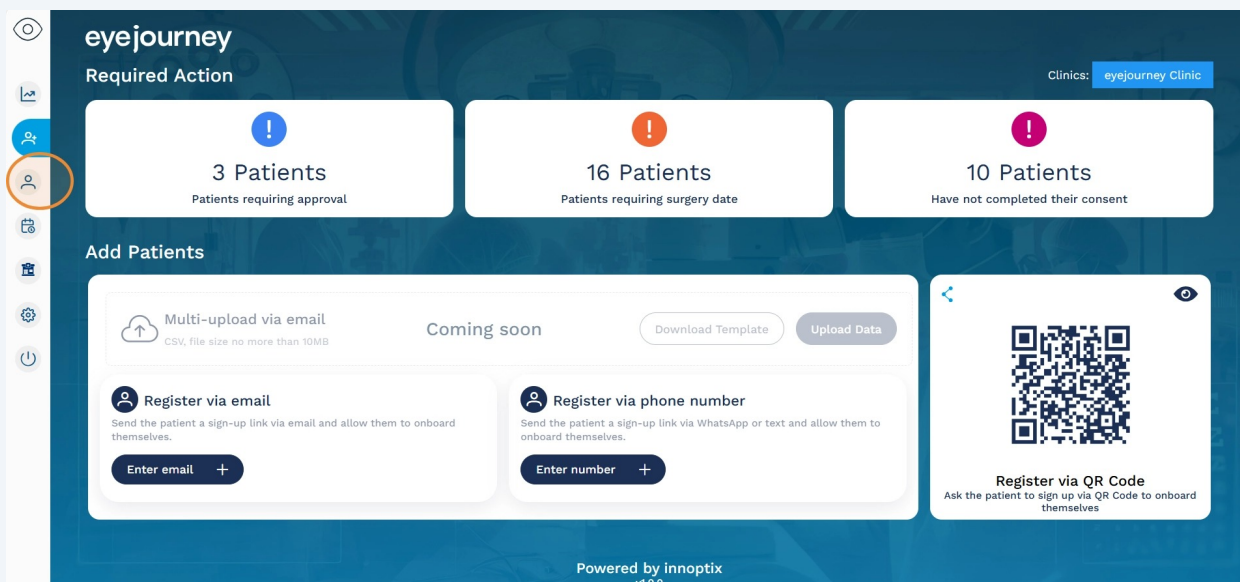
22 Alternatively, you may register patients using the QR code.

With this method, the patient will scan the QR code and register themselves, adding their personal details as above.



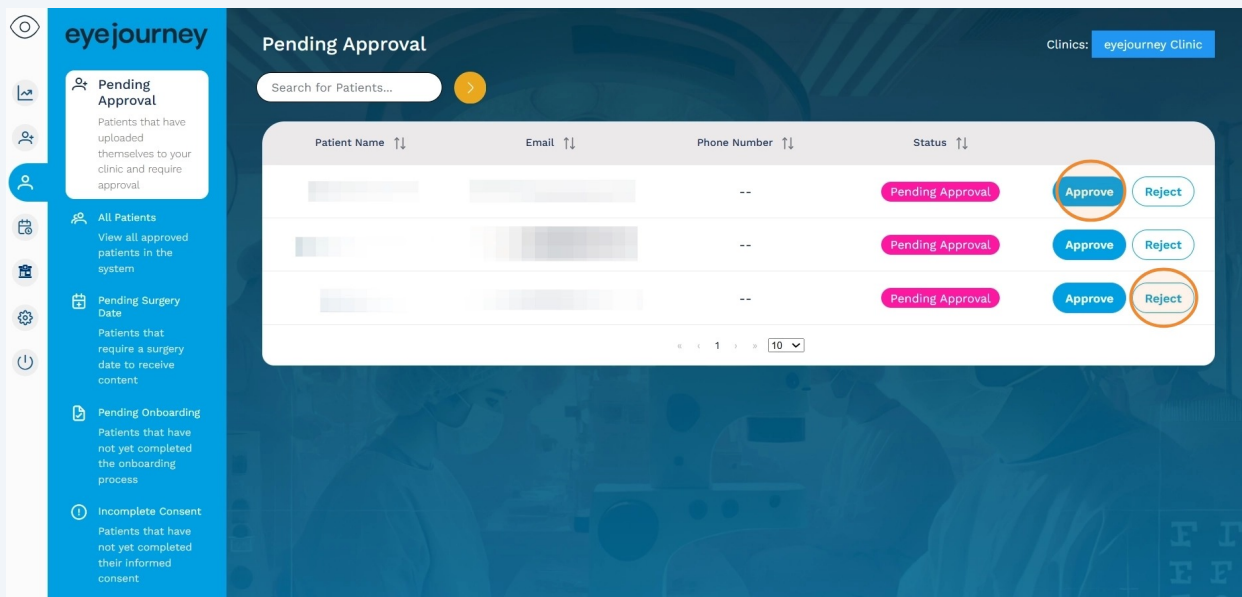
23 For patients you register using this method, you will need to manually approve them.

To do this, click on the Patient icon on the left of the dashboard.



24 Navigate to the 'Pending Approval' tab.

You will see a list of patients pending approval. Approve or reject as required.



25 Once approved, you must select which communication flow the patient is to be assigned to from the list in the drop down provided.

Patients who are rejected from the system will be deleted.

