Creating An Onboarding Flow For eyejourney

eyejourney

This guide walks you through how to create a flow in eyejourney, showing you how to structure patient journeys, add key steps, and tailor content and reminders to support patients at every stage of their treatment.

1 Navigate to **eyejourney** (Rest of World), **eyejourney** (USA), **eyejourney** (AUS/NZ/South Africa).

2 Click on the content tab, shown below.

3 Click "Add flow" in the top right corner.
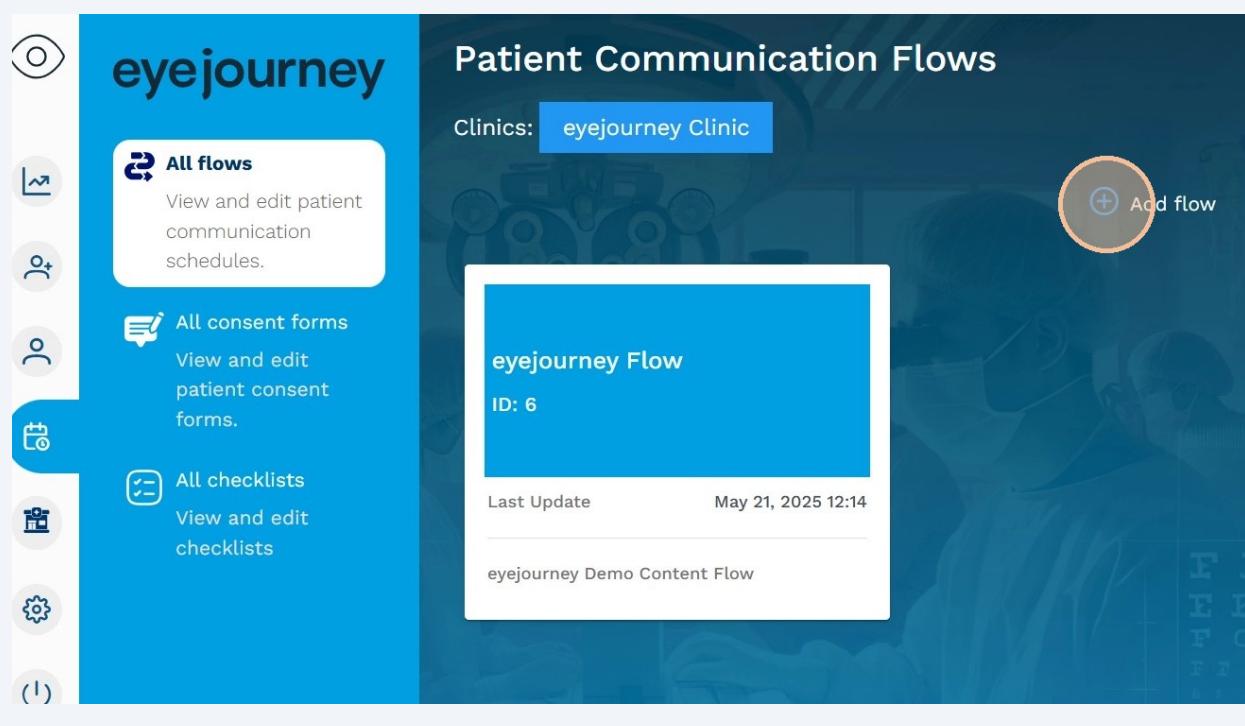
4 Please add some details when Adding a flow:

• Name

• Description - this can be a brief description of the flow

• Language

• Requires IOL/ICL - this is to ensure patients on this flow receive IOL/ICL patient reported outcomes questionnaires.

Click save once all data has been added.
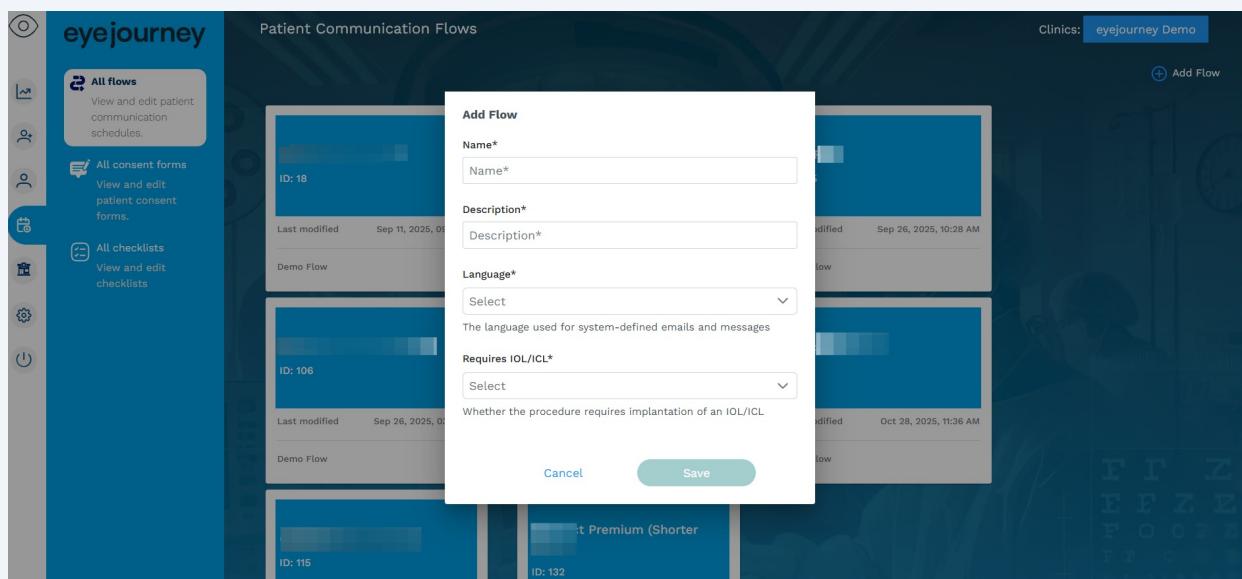
5 Once created, click on that flow.

All checklists
View and edit checklists

Last Update   May 21, 2025 12:14

eyejourney Demo Content Flow

eyejourney Test Flow
ID: 21

Last Update   Today 10:40

Test Flow

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v1.0.0
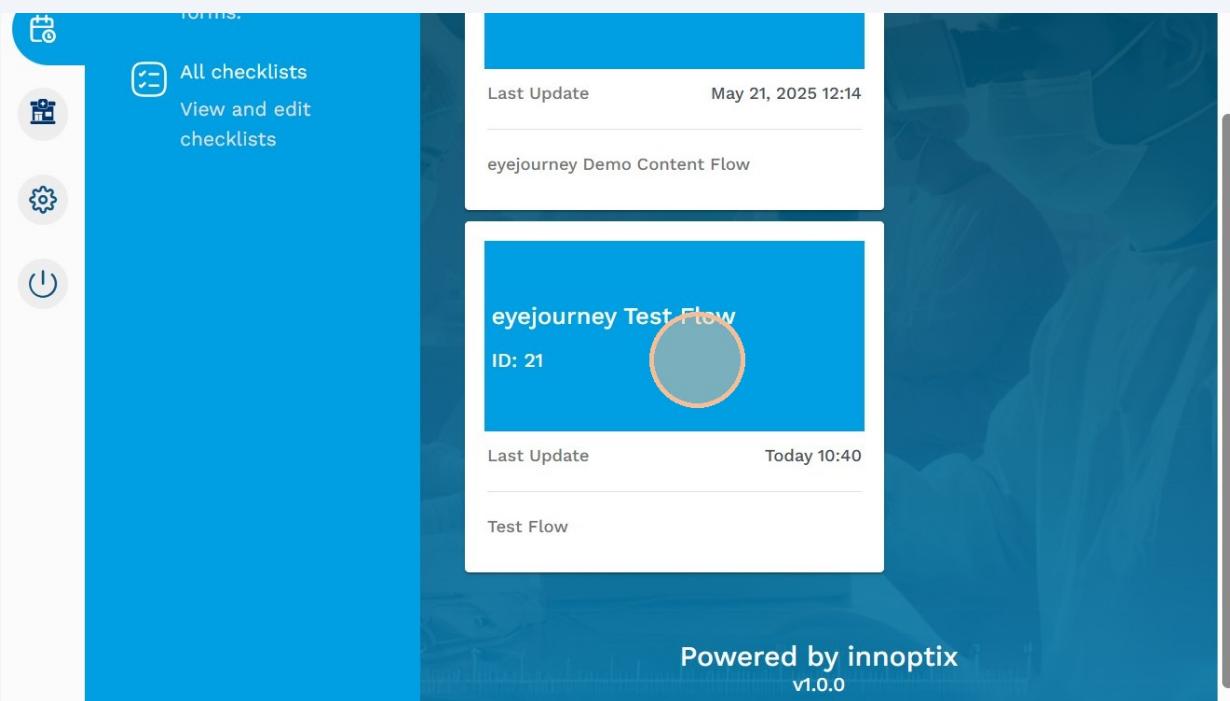
6 Once you are in the flow, click "Add item" on the top right corner.

New Flow
ID: 177

Created at:
Today 11:20

Flow Description:
Test

Edit Flow

Add Item

Powered by innoptix
v1.0.0
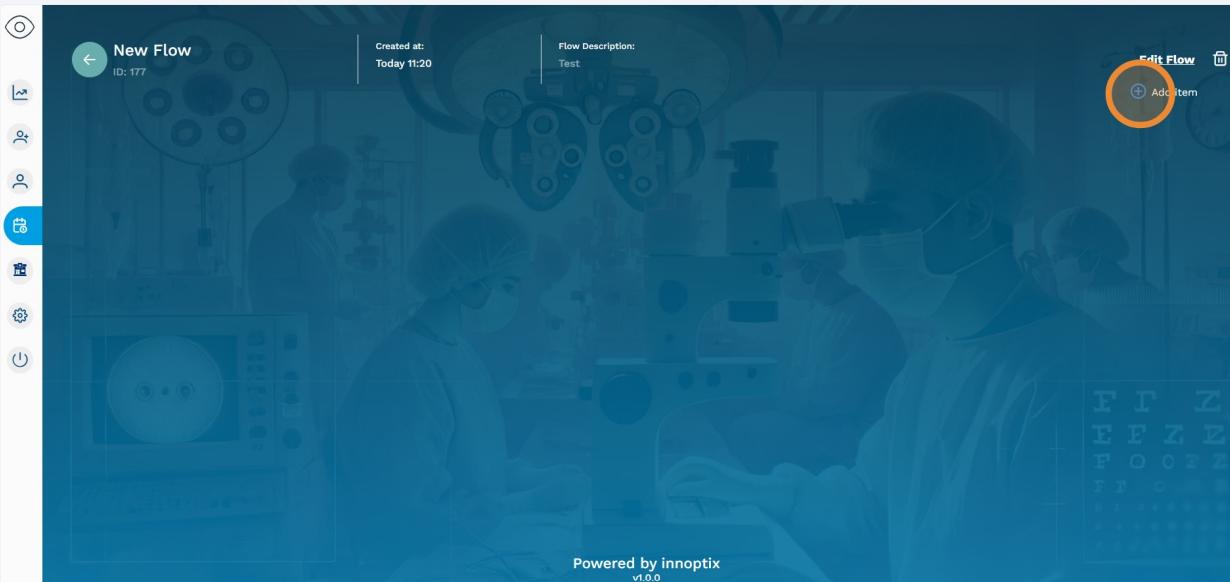
7 Please then populate the event:

   • Add Content Name - *enter the name of that content, for example 'Understanding the Risks of Cataract Surgery'*

   • Add Content Description - *provide a brief description of the content being added.*

   • Content Type - *this is always automatically 'Education'. This can be amended by clicking the drop down list.*

   • Schedule Trigger Basis - *content can be shared on onboarding date, after onboarding date, pre-surgery, on surgery date, and post-surgery. Content can also be sent from the patients second surgery date too, for patients undergoing bilateral surgery.*

   • Content Sent - *Select if the content is to be sent On or After Onboarding date or Before, On or After Surgery Date.*

   • Number of Days - *Add the number of days post-Onboarding or pre- or post-Surgery you would like the content to be shared.*

   • Time of Day - *Select whether you want your patients to receive this content Morning, Afternoon or at a Custom time (e.g. 18:00pm).*

8

Please scroll to the bottom of the page. Here you will be able to add a Content Link or a Video Link.

Paste the link into the field provided.

You may add as many links as you wish here.

App Notification Version

Notification Title

Notification body

Remaining 2/3 visible lines in a notification. Clipped at 50-250 characters

Notification content

Links/Attachments

Content Link(s)   ⊕ Add Content Link

Video Link(s)   ⊕ Add Video Link

ID V1769169684967   Button/Link Text Click to Watch Video   URL https://studio.youtube.cor ✕

ⓘ Any suspicious data will be deleted on save   Save

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v1.0.0

9

Enter the Email Subject, Message and Signature Block. This content will be shared with your patient.
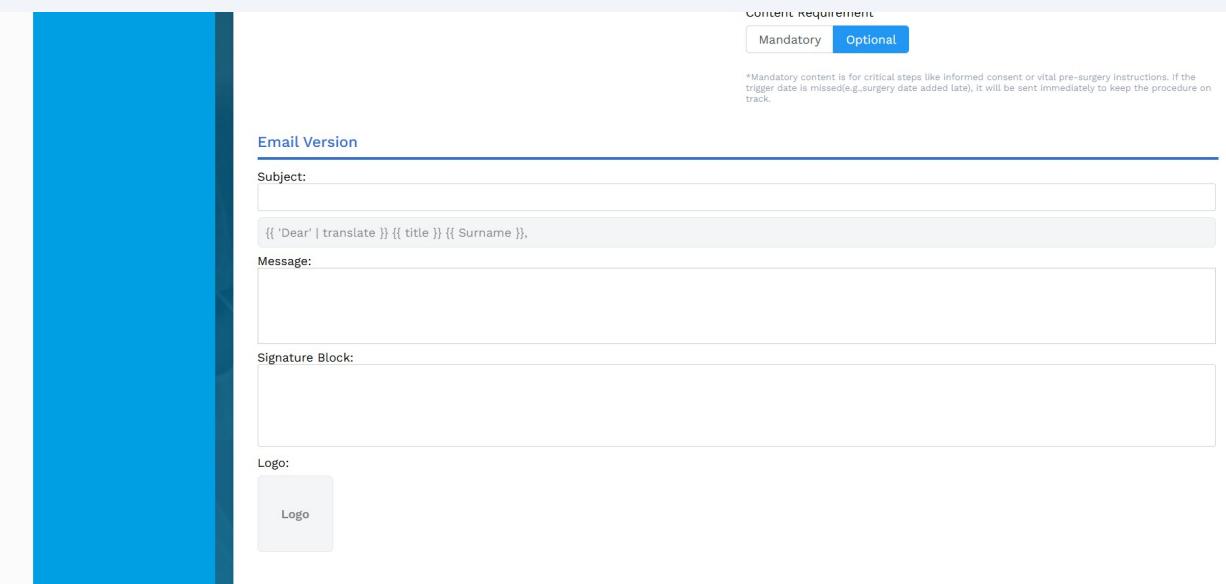
Content Requirement

Mandatory   Optional

*Mandatory content is for critical steps like informed consent or vital pre-surgery instructions. If the trigger date is missed(e.g.,surgery date added late), it will be sent immediately to keep the procedure on track.

Email Version

Subject:

{{ 'Dear' | translate }} {{ title }} {{ Surname }},

Message:

Signature Block:

Logo:

Logo

10 In order to add a link into the email, please add '{{' and click the 'Click to Watch Video' which pops up along side. This will embed the video/content link which you added in Step 8 above within the email.
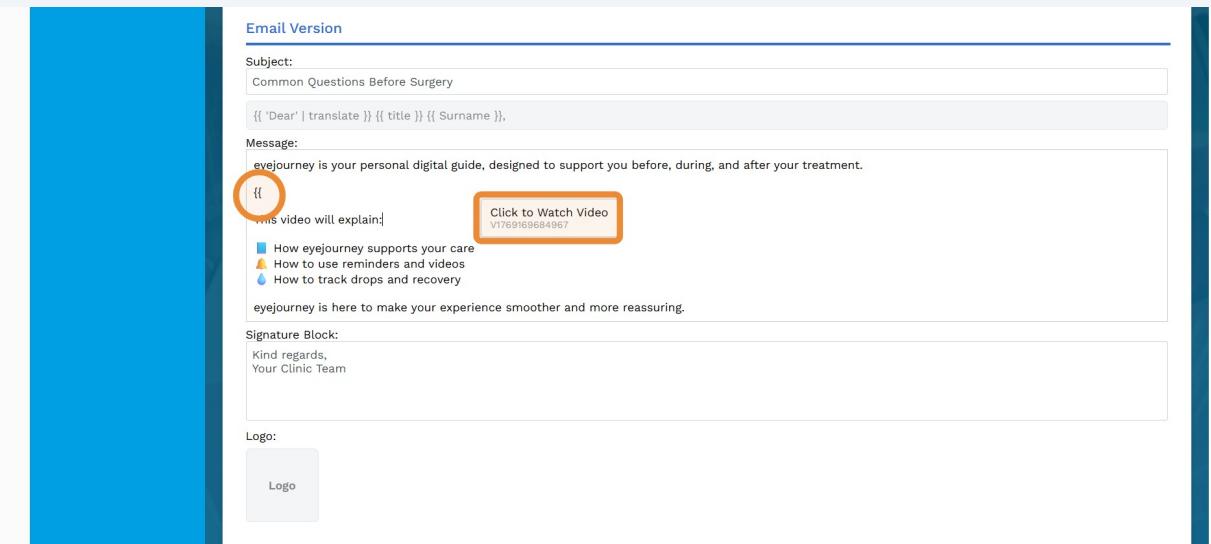
11 Populate the SMS and App Notification Content.

The Notification Title is what patients see as their notification. The Notification Body acts as a short header of the app notification. The Notification Content is an overview of what the patient can expect for that event.

In the SMS version, similar to 'Step 10' above, please add '{{' to embed a link to the video/content in the SMS.
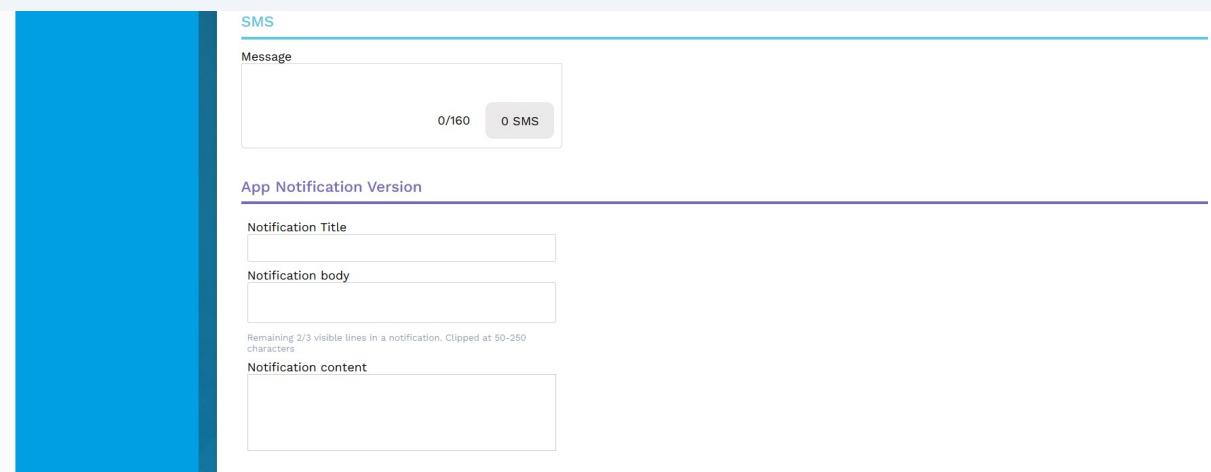
12   Please ensure you click "Save" once completed.
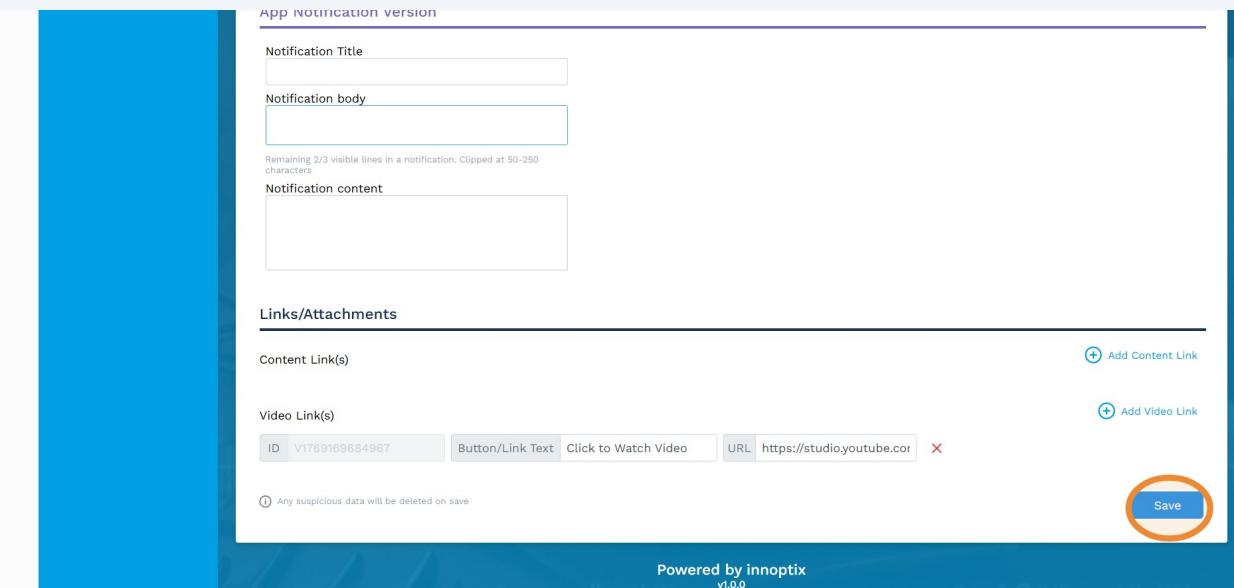
App Notification Version

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Notification body

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Notification content

Links/Attachments

Content Link(s)   ⊕ Add Content Link

Video Link(s)   ⊕ Add Video Link

ID V1769169684967   Button/Link Text Click to Watch Video   URL https://studio.youtube.cor ✕

ⓘ Any suspicious data will be deleted on save   Save

Powered by innoptix
v1.0.0

13   All events can be edited using the pencil icon.
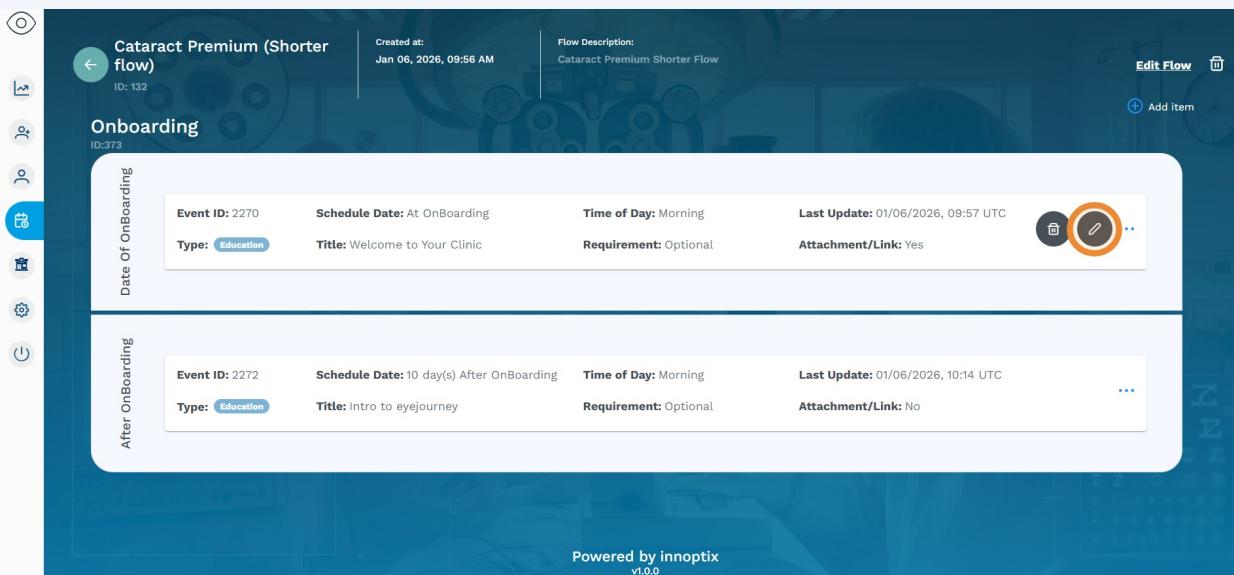
Cataract Premium (Shorter flow)
ID: 132

Created at:
Jan 06, 2026, 09:56 AM

Flow Description:
Cataract Premium Shorter Flow

Edit Flow 🗑

⊕ Add item

Onboarding
ID:373

Date Of OnBoarding

Event ID: 2270   Schedule Date: At OnBoarding   Time of Day: Morning   Last Update: 01/06/2026, 09:57 UTC   🗑 ✏ ⋯

Type: Education   Title: Welcome to Your Clinic   Requirement: Optional   Attachment/Link: Yes

After OnBoarding

Event ID: 2272   Schedule Date: 10 day(s) After OnBoarding   Time of Day: Morning   Last Update: 01/06/2026, 10:14 UTC   ⋯

Type: Education   Title: Intro to eyejourney   Requirement: Optional   Attachment/Link: No

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