

Creating An Onboarding Flow For 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.

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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.

The screenshot shows the 'Patient Communication Flows' dashboard for 'eyejourney Clinic'. It has a blue sidebar on the left with the 'eyejourney' logo and three menu items: 'All flows' (with a description), 'All consent forms', and 'All checklists'. The main area is dark blue and titled 'Patient Communication Flows'. It includes a 'Clinics: eyejourney Clinic' filter, an 'Add flow' button (circled in orange), and a modal window for 'eyejourney Flow' with ID 6, last updated on May 21, 2025 at 12:14. The modal also shows 'eyejourney Demo Content Flow'.

eyejourney

Patient Communication Flows

Clinics: eyejourney Clinic

All flows
View and edit patient communication schedules.

All consent forms
View and edit patient consent forms.

All checklists
View and edit checklists

eyejourney Flow
ID: 6

Last Update: May 21, 2025 12:14

eyejourney Demo Content Flow

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.

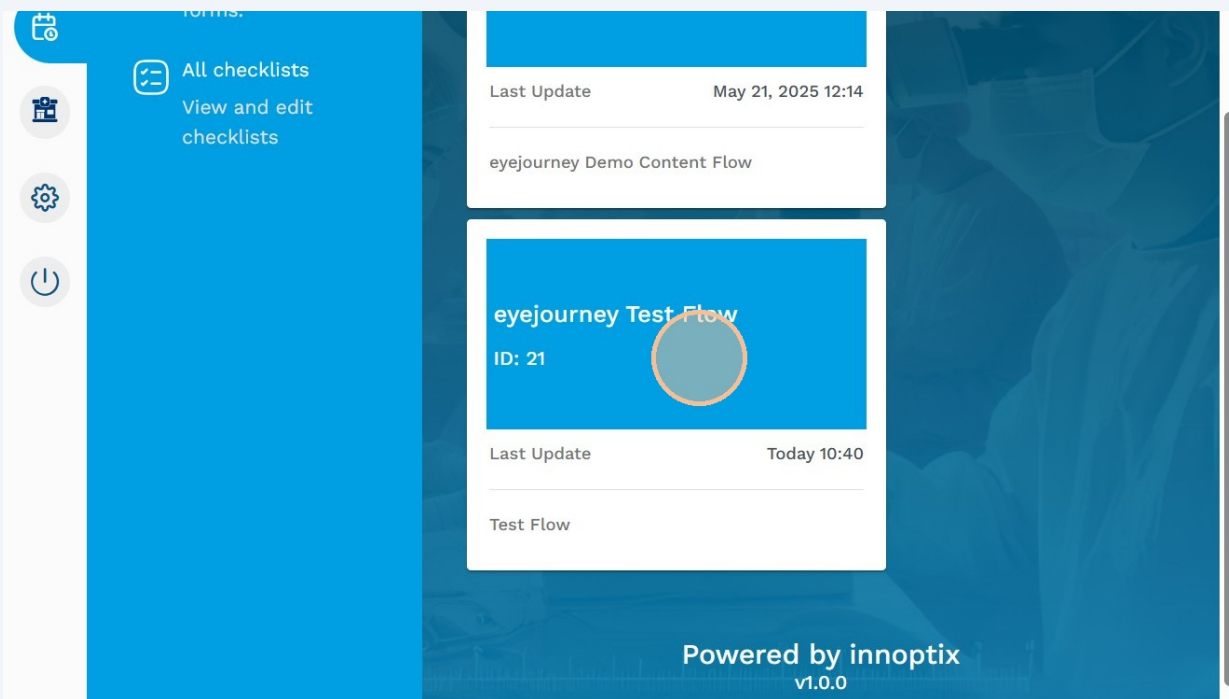
Click save once all data has been added.

The screenshot shows the 'eyejourney' application interface for 'Patient Communication Flows'. A modal window titled 'Add Flow' is open in the center, allowing users to create a new flow. The modal contains the following fields and options:

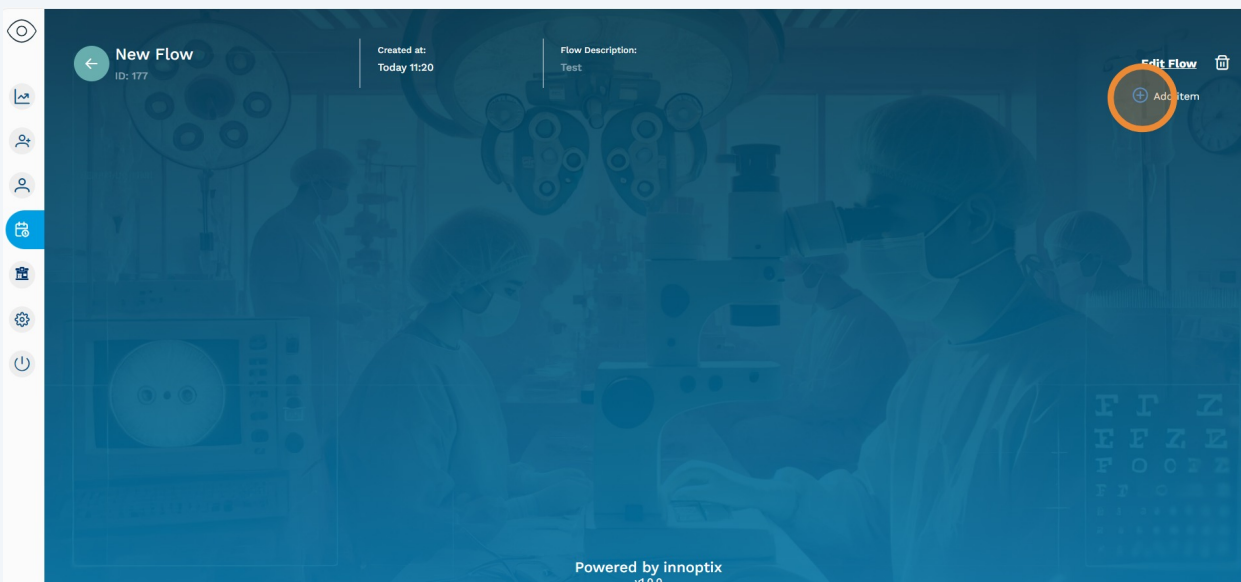
- Name***: A text input field with a placeholder 'Name*'. Below it, a label 'Name*' is visible.
- Description***: A text input field with a placeholder 'Description*'. Below it, a label 'Description*' is visible.
- Language***: A dropdown menu with 'Select' as the current selection. Below it, a label 'Language*' is visible, followed by the text 'The language used for system-defined emails and messages'.
- Requires IOL/ICL***: A dropdown menu with 'Select' as the current selection. Below it, a label 'Requires IOL/ICL*' is visible, followed by the text 'Whether the procedure requires implantation of an IOL/ICL'.

At the bottom of the modal are two buttons: 'Cancel' and 'Save'. The background interface shows a list of existing flows with columns for ID, Last modified, and Demo Flow. The 'eyejourney' logo is in the top left, and 'Clinics: eyejourney Demo' is in the top right.

5 Once created, click on that flow.



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



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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).*

The screenshot shows the 'eyejourney' 'Add Event' interface. The header includes 'New Flow' with ID: 177, 'Created at: Today 11:20', and 'Flow Description: Test'. The main form is titled 'Content Configuration' and contains the following fields and options:

- Content Name:** A text input field.
- Content Description:** A larger text input field.
- Content Type:** A dropdown menu currently set to 'Education'.
- Schedule Trigger Basis:** Three radio buttons: 'Onboarding Date' (selected), '1st Surgery Date', and '2nd Surgery Date'.
- Content Sent:** Two radio buttons: 'On' and 'After' (selected).
- Number of Days:** A text input field with '10' and a 'Day(s)' label.
- Time of Day:** Three radio buttons: 'Morning' (selected), 'Afternoon', and 'Custom'.
- Time of Day:** A time selection field below the radio buttons.

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)

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

Any suspicious data will be deleted on save

Save

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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.

Email Version

Subject:
Common Questions Before Surgery

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

Message:

eyejourney is your personal digital guide, designed to support you before, during, and after your treatment.

{{

This video will explain:

Click to Watch Video
V1769169684967

- How eyejourney supports your care
- How to use reminders and videos
- How to track drops and recovery

eyejourney is here to make your experience smoother and more reassuring.

Signature Block:

Kind regards,
Your Clinic Team

Logo:

Logo

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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.

SMS

Message

0/160 0 SMS

App Notification Version

Notification Title

Notification body

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

Notification content

12 Please ensure you click "Save" once completed.

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.com> X

Any suspicious data will be deleted on save

Save

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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

Onboarding ID: 373 Add Item

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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