

# Optinet™

# FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE



**A guide to using OPS (Optical Payment Services) in FLEX from Optinet.**

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## **Introduction**

Welcome to OPS (Optical Payment Services) in FLEX from Optinet. OPS is an exclusive service for NEG (National Eyecare Group) and Optinet FLEX members. It offers a cost-effective way of collecting monthly payments from your patients, by Direct Debit. Regardless of whether you already collect Direct Debits or use standing Orders, OPS can save you money and offer an easy to use, paperless service which can help you manage your cashflow and increase your patient loyalty.

## **Benefits of the OPS Direct Debit services**

- Bank account validation
- Advanced notification sent to payee
- Can be fully paperless or paper mandates
- View & amend payer records including payment history
- Full reporting of cancelled D/D on day of cancellation
- Fully detailed reconciliation reports on day of clearing
- Fully integrated with Optinet FLEX Practice Management Software

This guide details how to use OPS in FLEX. The initial setup (by Optinet Customer Service) is very quick, and the system is easy to manage and maintain, with little user intervention required.

If you require any further support, please call to speak to one of my team, or feel free to email me personally using the details below.

Yours Faithfully,

Chris Gray

Customer Services Manager for Optinet

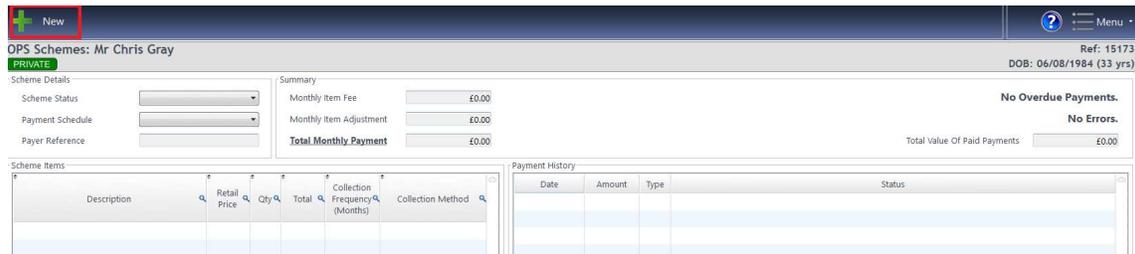
0800 310 2400 / [www.optinetuk.com/support](http://www.optinetuk.com/support) / [chris.gray@optinetuk.com](mailto:chris.gray@optinetuk.com)

***For further information on the online portal and OPS based enquiries, please contact BottomLine on 0344 826 6700***

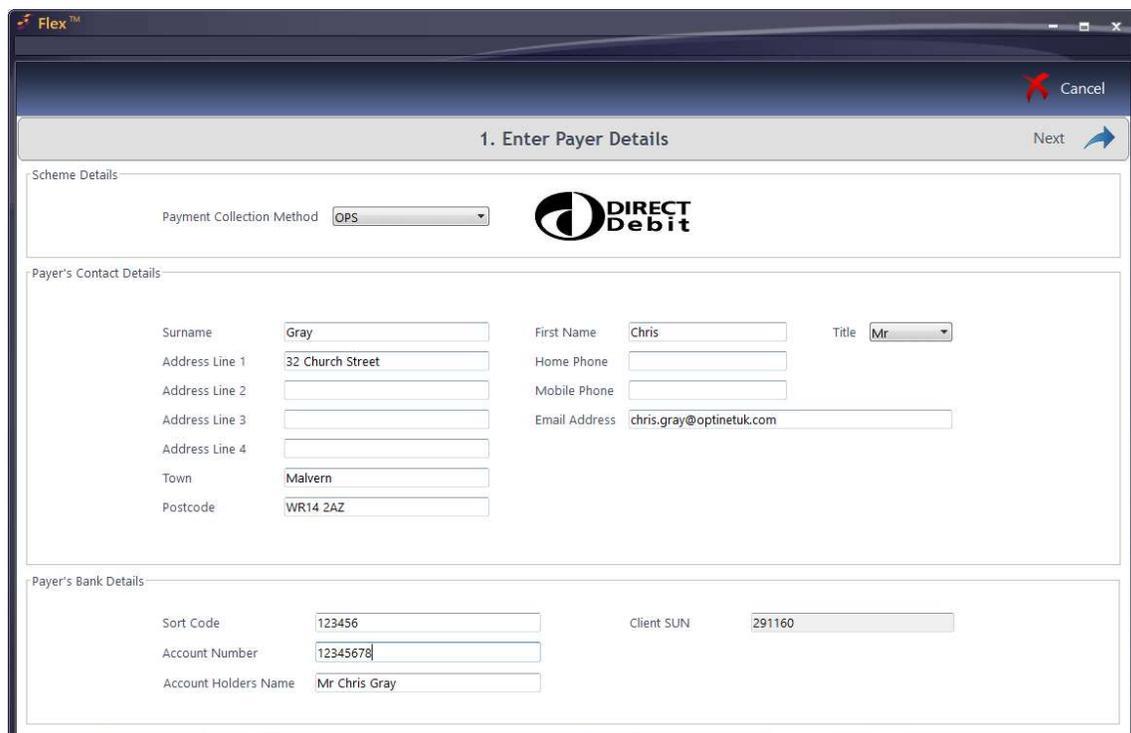
To create a new OPS Payee, click the **'Contact Lens'** button on the Patient Record, and then click **'OPS'**. This will open a summary window containing the OPS record.



To create a new record, click **"New"** in the top-left of the summary window.



### Step One: "Enter Payer Details"



The following details need to be completed.

**Payment Collection Method.** This is not editable and will always be set to OPS by direct debit.

**Payer's Contact Details.** These are shown in the middle section of the screen and will be pre-populated from the Patient Record where available. They can be edited here, but any changes will not be reflected on the Patient Record. Only standard **Title** options are available. Title, First name, Surname, Postal Address and Email Address are required.

**Payer's Bank Details.** These must be entered at the bottom of the screen. Validation is used here, so only genuine Sort Code and Account Numbers can be entered.

**Client SUN.** For existing direct debit users, your existing client SUN number can be transferred over to OPS. For new customers, OPS will provide one. This is automatically populated from the setup in Flex.

## **Step Two: Select Items and Payment Schedule**

The screenshot shows the '2. Select Items And Payment Schedule' screen in the Flex software. The interface includes a 'Back' button, a 'Next' button, and a 'Cancel' button. The 'Select Payment Schedule' section shows 'Payment Plan' set to 'Fixed Plan', 'Payment Schedule' set to 'Ongoing', '1st Payment Date' set to '25/05/2018', and 'Regular Payment Day' set to '25'. The 'Add Scheduled Items' table is as follows:

Description	Retail Price	Qty	Total	Collection Frequency (Months)	Collection Method
1-DAY ACUVUE DEFINE - SPARKLE	£10.00	2.00	£20.00	1	Direct From Supplier
Solutions	£6.00	1.00	£6.00	3	Direct From Supplier
CL Fees	£4.00	1.00	£4.00	1	Direct From Supplier
Total			£30.00		

On the right side of the table, there are buttons for 'Previous CL', 'Contact Lenses', and 'Stock Item'. A summary box at the bottom right shows the following values:

Monthly Item Fee	26.00
Monthly Adjustment	0.00
<b>Total Monthly Payment</b>	<b>26.00</b>

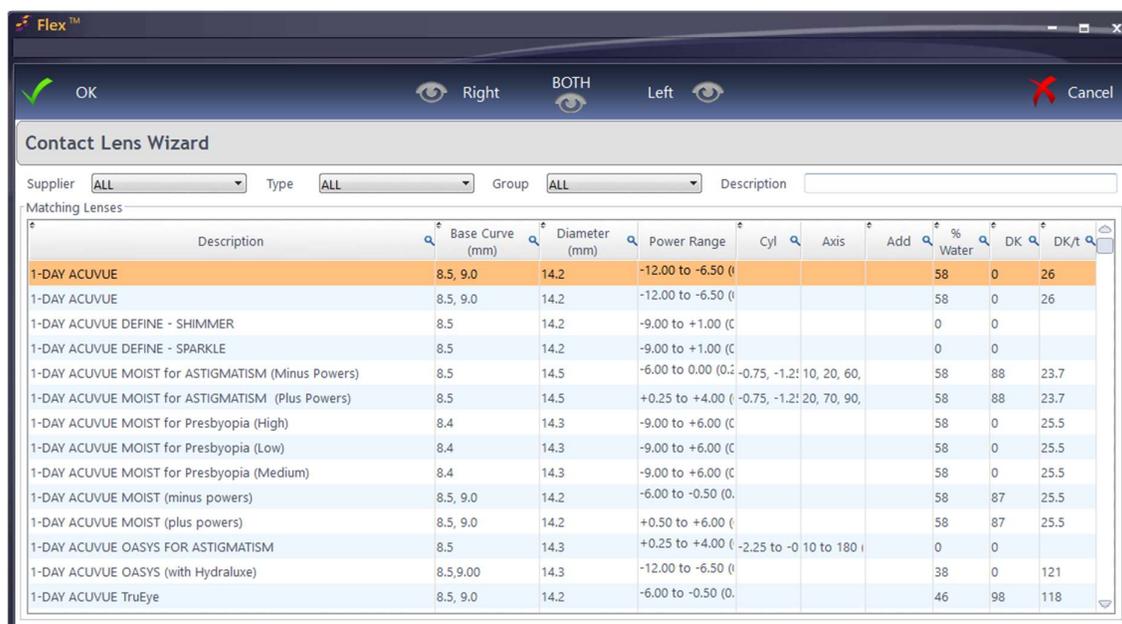
When you select a **Payment Plan**, the **Payment Schedule** and **Regular Payment Day** are automatically populated. These cannot be changed within the same payment plan, but multiple payment plans can be set up with OPS.

The **1<sup>st</sup> Payment Date** can then be selected. This must fall on the regular payment day, so you can only change the month here. You must create the scheme 3 working days and 6 calendar days in advance of the first payment day, otherwise the scheme will start from the next month.

Items can then be added using the three methods shown below:

**Previous CL:** Here you can choose lenses (and, where applicable, solutions from the previous Contact Lens Examination). Click the relevant exam from the list to bring through this data.

**Contact Lenses:** This opens the lens wizard (shown below), where lenses can be selected. *Some detail lifted from the contact lens help is also shown below.*



Choose the **Supplier, Lens Type** and **Lens Group**, or start typing the lens data into **Description**. Lenses available will be shown under **Matching Lenses**. Double-click on a lens to select it for both eyes (or press **BOTH**) shown at the top of the screen. The lenses will then be shown in yellow rectangles for each eye. Alternatively, press **Right / Left** to select for just one eye, and then find the other lens (if relevant) and repeat the process. Press **OK** and the Lens Wizard will close; we will then be back to our previous screen with the lenses now populated.

**Stock Item:** opens a list of all stock on the system, where you can add further items, for example fees.

Once you have added your items, the **Monthly Item Fee** will have been worked out for you. You can round it up/down using the **Monthly Adjustment** box, which then gives you the **Total Monthly Payment** amount.

## Step Three: Review Payment Schedule

Date	Amount	ProfFee	DispFee	VAT	Type	Status
25/07/2018	£26.00	£4.00	£7.89	£2.35	S	Pending
25/06/2018	£26.00	£4.00	£7.89	£2.35	S	Pending
25/05/2018	£26.00	£4.00	£7.89	£2.35	S	Pending

The payment schedule will then display a list of all previous payments made, as well as the next 3 payments due.

**Ad-Hoc Payments** can also be added from this screen. Ad-Hoc payments are used to schedule one off payments. For example, if the previous months payment failed.

Ad-hoc payments can only be scheduled on working days, between 3 and 33 days from today's date. They also cannot be scheduled before the first regular payment is due.

Once all the details are complete, we are ready to **Save** the record. At this point data is sent to OPS and Flex will return to the summary screen. Any issues when sending the data to OPS will be displayed in the top right of the screen.

Description	Retail Price	Qty	Total	Collection Frequency (Months)	Collection Method
1-DAY ACLUVUE DEFINE - SPARKLE	£10.00	2.00	£20.00	1	Direct From Supplier
Solutions	£6.00	1.00	£6.00	3	Direct From Supplier
CL Fees	£4.00	1.00	£4.00	1	Direct From Supplier

Date	Amount	Type	Status
25/07/2018	£26.00	S	Pending
25/06/2018	£26.00	S	Pending
25/05/2018	£26.00	S	Pending

Pushing **Update** allows us to select **Scheme Details** and go back into the wizard we just created the record with.

When updating an existing scheme, any changes must be made 6 days in advance of the next payment, else the changes will only take effect from the following month.

Under **Scheme Status**, we can choose to **Suspend** or **Cancel Scheme**. If either of these have been chosen, the Scheme Status would then allow us to reactivate the scheme which has been suspended / cancelled.

This completes the OPS system on the Patient Record.

OPS will automatically reconcile and inform you of any missed payments, or errors around them. To see this, navigate to **Schemes** and choose **OPS**. All the data downloaded from OPS is shown in here, and you can **Print** the data. There is also an **OPS Errors** option for you to view any issues.

Payment Plan	Px #	Px Name	Payer Reference	Status	£ Due	Due Date	Disp Fees	Prof Fees	VAT
Fixed Plan	15173	Gray, Chris (Mr)	CMGCHGR0608841	Pending	£26.00	25/05/2018	£7.89	£4.00	£2.35

### Some tips:

When signing up a patient with a new scheme the patient and the practice will get a confirmation email. Therefore an email has to be chosen in FLEX. If the patient does not have an email address then you should put the practice email address in the field, but just be aware that you will get two confirmations.

When setting up a scheme it is always preferable for the patient to sign a mandate, but alternatively when you create the scheme, you have a script (from OPS) that you can read out to the patient. If you haven't got the script, please contact OPS.

When changing payment amounts patient's need to be informed AT LEAST 6 days before, but OPS always recommend 2 weeks. Any changes done to patient's payment schedules needs to be before the 14<sup>th</sup> (based on a bill date of 25<sup>th</sup>), otherwise the changes will be won't take effect until the following month.

For support regarding	Who to contact, and how
Setting up a new patient in FLEX	Optinet Support, 0845 313 0233 / <a href="http://help.optinetuk.net">http://help.optinetuk.net</a>
Viewing the reconciliation of patients in FLEX	Optinet Support, 0845 313 0233 / <a href="http://help.optinetuk.net">http://help.optinetuk.net</a>
Reporting of OPS and VAT in FLEX	Optinet Support, 0845 313 0233 / <a href="http://help.optinetuk.net">http://help.optinetuk.net</a>
Anything outside of the FLEX-specific areas above	First Capital Cashflow, 0344 826 6700 / <a href="https://www.firstcapitalcashflow.com">https://www.firstcapitalcashflow.com</a>