

Optinet™  
**FLEX**  
ADVANCED PRACTICE MANAGEMENT SOFTWARE



**A guide to "The Basics" in FLEX**

Logging In, The Home Screen, Patients, Test Records, Diary, Till

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Welcome to FLEX from Optinet. Whether this guide is your first experience of FLEX, or you are dipping into it days, weeks or even months after a training day, I hope you find this guide and our range of resources beneficial to you. We are here to help through these training manuals, which in turn are lifted from the online help system at <http://help.optinetuk.net> – this can be accessed using the blue question mark in the top corner of FLEX.

You can also book remote telephone training sessions to help you get to grips with areas you may be struggling with, or to help you maximise the potential of the software. These sessions and the web help are included in your monthly charge.

Also, it is not uncommon for practices to book further training, one to three months after the initial training to capitalise on the system.

If you feel you would benefit from further on-site training, you can book additional days for £149+VAT for three months from the date of your training. This £149+VAT offer then “rolls” forward for another three months every time you book more days. Please contact me in the first instance if you would like to discuss this offer and your requirements. *Prices and offer details correct at time of printing.*

The support team will be happy to help you with any queries every weekday from 8:45 to 5:30, and also offer a limited service on Saturdays from 9:00 to Noon. Our “FLEXpress” newsletter, available by email to share with your colleagues, details our “Appointment to View” webinars, links to watch video support and give your feedback on the software. It also includes Quick Tips, Diary Dates and details of the latest National Eyecare Group offers available.

Finally, may I wish you the very best of luck with FLEX, and if there is anything else I can help with, you can also contact me personally using the details below.

Yours Faithfully,

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Did you know there is a separate workbook to help you get to grips with FLEX? You should find this in your welcome folder given to you on your training day. If you don't have one or need more copies, you can download and print these off through the FLEX Training Portal at <http://bit.do/flexhelp>

This guide also talks you through the basics of computer functions, from what each mouse button does to what the difference between the control and the shift keyboard keys are. Use this guide in tandem do help build your FLEXperience level.

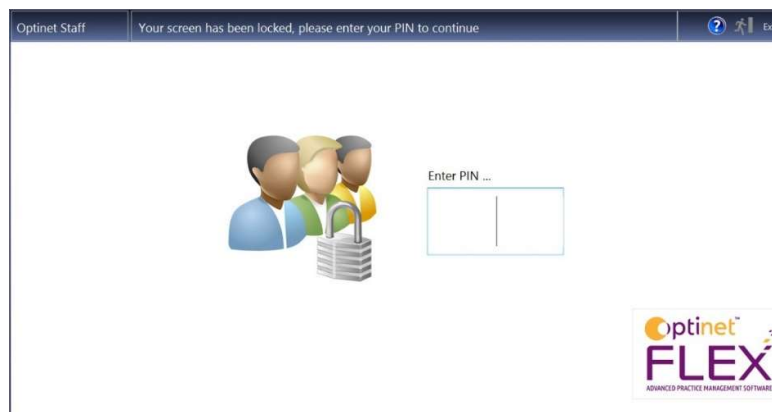
## Logging In

At the training day, you will have been given a Staff ID number (“public”) and set a PIN code (known only by you). If FLEX is not currently open on your computer, double click the “Flex” icon on your desktop. After a couple of seconds, the screen below will be shown.



Enter the details you have been given, choose your branch (even if you only have one) and then press the “Login” button which appears when the details have been filled out.

If FLEX is already open, you will see the Lock screen. From here, simply click into the PIN box and enter your PIN code; the last correct digit lets you in (no need to press Enter).



When you have finished, press the **F6** button on your keyboard to lock the screen.

## The Home Screen

The screenshot displays the FLEX Home Screen with a dark blue header. The top left corner features a yellow star icon and the text "Change Widgets". The top right corner has a blue question mark icon and the text "Menu".

The screen is divided into four widgets:

- Patient Search:** Shows a search bar with "jon,tom" entered. Below it is a table with columns: Ref #, Surname, First Name, and Address. The first row is highlighted in orange and contains: 23274, Jones, Tom, 79 Station Road.
- Arrivals:** Shows a table with columns: Time, Reason, First name, Surname, and Title. The table is currently empty.
- My Tasks:** Shows a "New" button and a table with columns: Age, Details, Px Name, and From. The first row is highlighted in orange and contains: 043d 05h 18m, Arrange for the OCT in pre-scee..., Practice, OSM.
- Timeline:** Shows a date selector set to "29/04/2014" and a table with columns: Type, Letters, Emails, SMSs, Postcards, Phone, and Total. The table contains the following data:

Type	Letters	Emails	SMSs	Postcards	Phone	Total
Recall	310	0	0	0	0	310
Marketing	0	0	0	0	0	0
Other	0	0	0	0	0	0
Totals	310	0	0	0	0	310

Once you're logged in, you will see the Home screen. The Home screen in FLEX acts as your personalised hub. It is designed to give you easy access to all of your most commonly used features on one screen.

The Home screen is divided into 4 "Widgets" which you can choose depending on your preferences, or your role within the practice. These can be changed or rearranged at any time. You can do this by pressing the "Change Widgets" button.

The Home screen is the first screen you will see once you have logged into Flex and you can return to the home screen at any time by clicking on the Home button in the top left hand corner of the software.



## Home Screen Widgets


### Patient Search

The Patient Search widget allows you to find Patients within Flex. Search by typing:

- The patient reference number
- The patient surname (or the first name, by putting a comma first, e.g. ",chris")
- The first three letters of the Patient surname and some or all of their first name. For example, for Tom Jones, search *Jon, Tom* or
- The patients home or mobile telephone number (home phone requires 01, 02 etc) **OR**
- The patients postcode.



You are also able to search in other ways.

- You can search within any of the displayed columns by clicking on the  icon and typing in your criteria.
- You can also click on any of the column headings to sort the results in ascending or descending order and browse through to find what you are looking for.



If you are unable to find someone because they are a new Patient, you can click on the new patient icon.

### Duplicate Patients

If you add a new record with a matching surname and date of birth to another patient, before saving the record, a notification that this *may* be a duplicate patient is brought up. If the new address entered matches a patient already on the system, it will ask if FLEX should add the new patient to a family.

## Home Screen Widgets: Arrivals

The Arrivals Widget shows a list of patients who have been booked into the diary for an appointment, and are due to arrive today.

Patients will appear with **a pale yellow band** 15 minutes before they are due.

Patients will appear with **a pale red band** when they are overdue.

Day Notes (if there are any) will appear at the top of this window as well as at the bottom of the diary.



Date / Time	First name	Surname	Title
29/04/13 (12:30)	Henrietta	Abbott	Mrs
29/04/13 (13:00)	Ernest	Ackerley	Mr
29/04/13 (13:30)	Kerryanne	Young	Miss
29/04/13 (14:00)	Norah	Lauder	Mrs
29/04/13 (14:30)	Lori	Mccormack	Miss
29/04/13 (15:00)	Terence	Nevins	Mr
29/04/13 (15:30)	Robbie	Mchenry	Mr

Right-click on a patient to mark them as attended, cancelled or failed.

-  Arrived
-  Failed To Attend
-  Cancel Appointment

They will then appear in the "Active Patient List" on the left hand side of FLEX (Pg. 10).

## Home Screen Widget: Staff Tasks

The Staff Tasks widget shows you your daily tasks. It shows both those which you have created yourself and also those which have been tasked to you by other staff members. This can be especially useful from a management perspective as you can task specific staff member's to do certain things, but also keep all staff members informed of important information by assigning a task to ALL staff members.

### Creating New Tasks

- To create a new task, click **New** on the Tasks Widget. The Date, Time and Staff Member will be filled out automatically.
- Type in the details of task, then select which staff member to assign the task to from the drop down menu. (Leave this blank to assign the task to ALL staff members.)
- Click **Save** to save the new task. It will then be listed in the My Tasks Widget for all staff members which it is assigned to. More details about this are available online.

## Home Screen Widgets: Timeline

A matrix display of all the Letters, SMS, Emails and Phone Calls due for Recall, Notifications and Marketing.

**FOR FURTHER HELP WITH RECALLS, PLEASE SEE THE SEPARATE GUIDE**

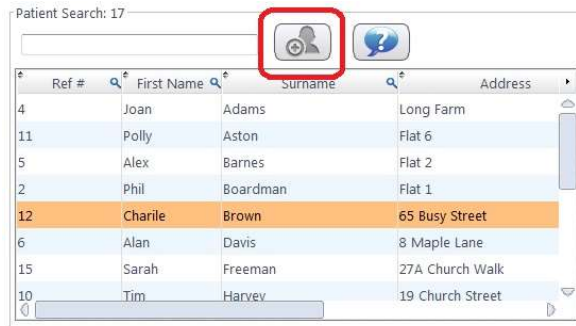


## **Patient Records**

Adding a patient record can be done from 3 different parts of the system. Each is detailed below.

### **1. The Home Screen**

On the patient search widget, if you can't find the patient you are looking for then press the new patient button. This will open the new patient entry form.



### **2. From An Existing Patient Record.**

On an existing Patient record, first click on **New** in the top menu bar then select **Patient** at the bottom of the drop down menu. This will also open the new patient entry form. You can also choose **New – Family Member**. This will open up a new record card, but with generic details already completed (Surname, Address, Home Phone, Doctor, Surgery).

### **3. When Booking an Appointment.**

When booking an appointment, a new patient can be added by clicking the **New Px** button.


This opens the search window into a data entry screen for the new patients' details. This final method is perhaps best for entering details if someone has called up or you are in the middle of something else, as slightly less details are required. You can then right click on the appointment and click **Go to Patient Record** to quickly travel back to the patient record.

## The Active Patient List

The Active Patient List displays at a glance all of the Patients who are in the practice, are expected to arrive or are being "actioned" in some way.

Patients are to the list when they have been marked as "Arrived" / "Attended" in The Home Screen / Appointments view, or they have been "double-clicked" through the patient search window.

Patients will be displayed in the list for the following reasons:



The screenshot shows a 'Patients' section with a folder icon. Below it is a list of six patients, each with a colored letter icon to the left of their name and age. The letters are: D (green), P (yellow), T (grey), A (blue), E (purple), and W (red). The patient 'Katy Eve (34)' is highlighted with a grey background.

Letter	Reason
D	Dispensing - A new <a href="#">Dispense</a> has been created for the patient.
P	Paying - A new <a href="#">Till</a> Receipt has been created for the patient.
T	Testing - A new Test has been created for the patient.
A	Active - The patient has been manually added to the list using Patient Search.
E	Expected - The patients appointment is due within 15 minutes.
W	Waiting - The patient has arrived for their appointment and is waiting to be tested.

You may not see all of these letters (yet), depending on how much of the software you are using.

To remove a patient from the list, right click on them and select **Dismiss Patient**. A patient will be dismissed after 30 minutes of inactivity on their record, although this dismissal time is customisable in the [Branch](#) setup.

## **Patient Records**

Once you have found the record that you want, double-click it and it will open the Patient Record screen. To update any details, press **Update**. Their record will open in a separate window and you can update accordingly. More about this online.

### **Adding a Sight Exam Record (Prescription)**

When a new **Sight Exam Record** has been selected from the **New** button at the top of the Patient Record, one of two windows will be created. This will be dependent on whether or not you use the **Clinical Module**. The Clinical Module gives Optometrists more detail, for example being able to carry out a customised Clinical Assessment, perform up to six refractions, create Clinical Drawings and upload Clinical Documents.

All staff members at practices using "Clinical" also have the option to enter a "Pre-Exam Record". Please see the online help for more details on this.

Note: Users with "Clinical" installed that are not set as an Optometrist will still see the standard test record. The table below shows what you can expect to see. Clinical users should see separate documentation / QuickStart guide for extra tabs.

<b>Tab</b>	<b>Clinical Mod</b>	<b>Non-Clinical</b>
Medical Assessment	✓	✓ <i>Optoms only</i>
Clinical Assessment	✓	X
Clinical Refraction	✓	/ <i>Called Prescription</i>
IOP / PD	✓	✓
Clinical Notes	✓	✓
Clinical Drawing	✓	X
Clinical Documents	✓	X
Clinical Billing	✓	X
NHS / Recall	✓	✓

## Medical Assessment (available to Optoms):

Drop down boxes are available for answers to basic questions such as whether the patient is a driver, DSE (Display Screen Equipment - Computer) user and what their Occupation is. If their Occupation is not listed, the green + symbol can be used to add it. Notes can also be added at this stage.

To the right of the screen, Medication can be added. Again, the intuitive interface means they can be "Dragged and Dropped" across, or a new Medication added at the bottom of the screen. When this is added, it asks you if you would like to add it to the Dictionary. These answers will be remembered for next time. Further clinical information is available in a separate guide.

The screenshot displays the Flex™ software interface for a patient named Mr Tom Jones. The interface is divided into several sections:

- Top Bar:** Includes a 'Save' button (green checkmark), 'View Previous', and a 'Cancel' button (red X).
- Patient Information:** 'Mr Tom Jones', 'Ref: 23274', and 'DOB: 01/05/1965 (49 yrs)'.
- This Examination Record:** Contains fields for 'Date / Time' (29/12/2014, 10:31), 'Last Test' (29/12/2014), 'Optometrist' (Mr Optinet Staff Member), and 'BVD' (14).
- Previous Examination Results:** A table showing examination data for 'Right' and 'Left' eyes.
- Medical Assessment:** A tabbed interface with 'General Assessment' selected. It includes dropdown menus for 'Driver?', 'DSE User?', and 'Occupation', a green '+' button to add a new occupation, and a text area for 'Occ. Notes'.
- Medication:** A section with a 'Current Medication' table and an 'Available Medication' library. The library lists various medications such as Alendronic acid, Allopurinol, and Aspirin.

Date	Time	Eye	Sphere	Cyl	Axis	Prism	Add
29/12/2014	10:22	Right	Plano	0.00	0.00	0.00	0.00
		Left	Plano	0.00	0.00	0.00	0.00

Medicine	Added	Removed

- Alendronic acid
- Allopurinol
- Amitriptyline
- Amlodipine
- Amoxicillin
- Aspirin
- Atenolol
- Atorvastatin
- Atropine
- Beclometasone dipropionate
- Bendroflumethiazide
- Benzympenicillin

## Clinical Refraction (Clinical) / Prescription (Non-Clinical)

This is where the Rx is entered. Clinical Users see this tab as **Clinical Refraction**, whilst non-clinical users see it as **Prescription**.

Non-clinical users will only be able to enter one Rx. Clinical Users can enter up to six types of test, and choose one as the Given. The number of tabs shown (between 1 and 6), and their names, can be customised within the [Examination](#) Tab of the Setup menu.

Clinical users can use the **Copy** button at the top of the window to copy results from a **Previous Rx**, from one Rx to another (e.g. **Last Test to Wearing**), and from **Right to Left** as necessary.

Clinical users can also **Transpose** the Rx accordingly.

Press tab to move between boxes. Validation of data occurs where necessary (for example if a Cyl has been entered, the Axis cannot be blank). The VA's can be entered in any format. "6/" and "N" (for near) will appear accordingly.

When the **Right Addition** is entered, the **Left Addition** will be automatically filled out, and the **Intermediates** and **Nears** for both eyes automatically calculated.

The screenshot displays the 'Flex' software interface for a patient named 'Mr FLEX Training'. The window title is 'Flex' and the status bar shows 'Last Saved: 29/11/2019 11:11:00'. The main interface is divided into several sections:

- Header:** Includes 'Save', 'Copy', 'Transpose', 'External Link', and 'Cancel' buttons. The patient name 'Mr FLEX Training' is displayed, along with a 'PRIVATE' status indicator, a '0' icon, and 'Ref: 12167' and 'DOB: 01/01/1984 (35 yrs)'.
- Examination Record:** Fields for 'Date / Time' (29/11/2019 11:11), 'Last Test', 'Optometrist' (Mr Optnet Staff Member), 'BVD' (12), and 'Type' (Sight Examination).
- Navigation Tabs:** 'Medical Assessment', 'Prescription' (active), 'IOP & PD', 'Clinical Notes', and 'NHS / Recall'.
- RIGHT Distance:** Fields for Sphere, Cyl (0.00), Axis (0.0), Prism (0.00), and Base. Includes 'Balance Lens' and 'Prism' sub-sections.
- Visual Acuity:** Unaided, Aided, and Pinhole fields.
- LEFT Distance:** Similar fields to the right eye, with 'Sphere' set to 'Plano'.
- Add:** 'Add' field set to 0.00, with 'Inter' and 'Plano' options.
- Intermediate:** Fields for Sph, Cyl (0.00), Axis (0.0), Prism (0.00), and Base.
- Near:** Fields for Sphere, Cyl (0.00), Axis (0.0), Prism (0.00), and Base.
- Notes:** A text area for additional notes.

## IOP / PD

The next tab in the examination involves entering the Inter-Ocular Pressures and Pupillary Distances. Corneal Thicknesses can also be entered on this screen.

The screenshot shows the 'IOP & PD' tab in the Flex software. The patient is identified as 'Mr FLEX Testing' (DOB: 01/01/1984, 35 yrs). The examination date is 28/11/2019 at 13:48. The interface includes fields for '1st IOP Readings' and '2nd IOP Readings', each with sub-sections for 'Right IOP' and 'Left IOP'. Each sub-section contains input boxes for 1st, 2nd, 3rd, and 4th IOP values and times, along with average IOP in mmHg and kPa. Below the IOP sections are fields for 'Right PD' and 'Left PD', each with 'Dist PD', 'Int PD', and 'Near PD' inputs. At the bottom, there are fields for 'Right Corneal Thickness' and 'Left Corneal Thickness' (CCT in µm). A 'View IOP History' button is located in the bottom right corner.

As IOP readings are entered, an average is automatically calculated. By using the **TAB** key on the keyboard to cycle through the boxes, the times of the reading are automatically entered.

PD reading are also automatically updated. For example, if 66 is entered as the Right PD Dist, it will automatically split the values for Right and Left. These can of course be changed manually. An overview of this is shown below.

This close-up screenshot shows the '1st: IOP Readings' section. The 'Tonometer' is set to 'Tonometer'. The 'Right IOP' section shows: 1st IOP: 20.0, 1st Time: 12:05; 2nd IOP: 18.0, 2nd Time: 12:05; 3rd IOP: 17.0, 3rd Time: 12:05; Average IOP: 18.3 mmHg, 2.444 kPa. The 'Left IOP' section shows: 1st IOP: 18.0, 1st Time: 12:06; 2nd IOP: 17.0, 2nd Time: 12:06; 3rd IOP: 19.0, 3rd Time: 12:06; Average IOP: 18.0 mmHg, 2.4 kPa. The 'Right PD' section shows: Dist PD: 33.0, Int PD: 0.0, Near PD: 0.0. The 'Left PD' section shows: Dist PD: 33.0, Int PD: 0.0, Near PD: 0.0.

## Clinical Notes

Any Clinical Notes can be created which will print out on the Rx accordingly. These are all "Free Text" fields. Information can be added here after the examination if necessary: the Clinical Record can be updated in the Patient Record as required.

The Clinical Billing section allows Optometrists to start a receipt for a patient in the testing room. The screen is shown below.

Code	Price
NHST	£20.90
OCT	£30.00
PT	£45.00

Barcode	Description	Selling Price	Qty
LBIF	Bifocal Lenses	£0.00	0
CLFEE	Contact Lens Fee	£0.00	0
CL	Contact Lenses	£0.00	0
FCH	Frame - CH	£0.00	0
FLM	Frame - LM	£0.00	0
FLP	Frame - LP	£0.00	0
FMM	Frame - MM	£0.00	0
FMP	Frame - MP	£0.00	0
FP	Frame - Parts	£0.00	0
FSUN	Frame - SUN	£0.00	0
CHC	Hardcoat	£0.00	0
CHMAR	HMAR Coating	£0.00	0
NHST	Nhs Exam Fee	£20.90	0
OCT	OCT Examination	£30.00	0

The sundry product group is shown in the right-hand third of the screen under **Available Items**. In the setup, **Quick Pick Items** can be set, so the most commonly used items can easily be

added to the patient bill. Double-click to add an item into the **Items for Billing** window.

## NHS / Recall

This is one of the most important pages within the Sight Test, whether or not you use the Clinical Module. Indeed, you cannot save a record without entering a recall.

The screenshot shows the 'NHS / Recall' tab in the Flex software. The patient is identified as 'Mr FLEX Testing' (Ref: 12167, DOB: 01/01/1984 (35 yrs)). The 'This Examination Record' section shows a date of 28/11/2019 at 13:48, performed by 'Mr Optinet Staff Member' with a BVD of 12. The 'NHS / Recall' section includes fields for 'Early Retest Reason', 'Domiciliary Reason', 'Photo Option Reason', 'Claim #', 'Evidence Seen', and 'Vouchers' (1st and 2nd). There are checkboxes for 'Complex', 'Prism', and 'Tint'. A 'Recommendations' list on the right includes options like 'Single Vision', 'Bifocal', 'Varifocal', 'Hi index Material', 'Polycarbonate', 'Aspheric', 'UV Filter', 'Anti Reflection', 'Scratch-resistant', 'Photochromic', and 'Contact Lenses'. At the bottom, there are two tables: 'Selected Recalls' (empty) and 'Available Recalls'.

Description	Months	Type
Adult	24	SE
Diabetic	12	SE
Glaucoma	12	SE

The **Recall** schedule can be set by selecting a template from the **Available Recalls** area. One Sight Exam (SE) can be set, with multiple Additional Exams (AD) added with no limit. For example, the next sight examination may be in 12 months, but a pressure check is required in 4 weeks.

You can update the number of months, and when the tab / return key is pressed, it will update the recall date.

FLEX will then automatically give the date and populate the Patient Timeline according to their contact preferences (Letter, Email, Text Message).

**Note: The record cannot be saved without setting a Recall!**



## The Appointments Diary:

### Booking an Appointment

Click onto "Appointments" on the right-hand side of FLEX. 4 different views can be chosen in the diary: **1 Day**, **6 Day**, **12 Day** and **Multi** (1 day view of all Rooms). These are selectable towards the top left hand side of the appointments window. You can also use the filters shown to show different rooms and, if applicable, branches.

To book an appointment, double-click the time-slot desired. This box will appear:

The screenshot shows the FLEX software interface for booking an appointment. The window title is "Tuesday 08 September 2015 12:30". The interface is divided into several sections:

- Appointment Details:** Includes fields for "Search Px", "Room" (set to "Disp Room (6)"), "Optom", "Returning", "New Px" (checkbox), "Length" (set to "15"), and "Reason" (set to "Dispensing"). There is also a "Notes" text area.
- Search Results:** A table with columns: Patient Ref, Surname, First name, Date of Birth, Address, Mobile Phone, and Deceased.
- Px Record:** Fields for Surname, First name, D.O.B, Gender, and Title. Below these are fields for Home Phone, Mobile Phone, and Email. There is also an "Address" field with a search icon.
- Cancellations & Failures:** A table with columns: Date, Time, Status, and Appointment/Cancellation Reason.
- Patient Recalls:** A table with columns: Description and Recall Date.
- Patient GOS Entitlements:** A list of entitlements including: Over 60, Over 70, Under 16, Full Time Student, Income Support, Income Based Job Seekers Allowance, Universal Credit, Employment Support Allowance, Pension Credit Guarantee Credit, Tax Credit Exemption Certificate, HC2 Certificate, HC3 Certificate, Registered Blind / Partially Sighted, Diabetes Sufferer, Glaucoma Sufferer, Glaucoma Risk, Over 40 - Related to Glaucoma Sufferer, Complex Lenses, and Prisoner on Leave.

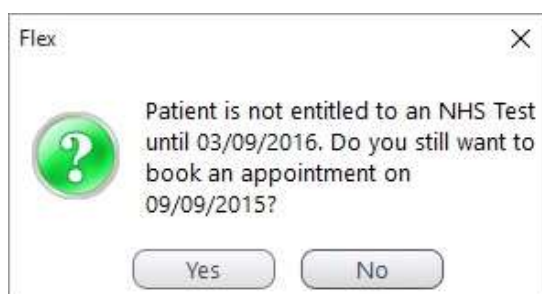
You can search for a patient in just the same way as the home screen, including using:

- The patient reference number
- The patient surname (or the first name, by putting a comma first, e.g. ",chris")
- The first three letters of the Patient surname and first name. For example, for Tom Jones, search *Jon, Tom* or
- The patients home or mobile telephone number or
- The patients postcode.

The patient details will be shown in the bottom third of the window. If the patient is new, check the box **New Px**. The bottom third of the screen then becomes editable. You can also press **Update Patient** in the top of the window to open up these fields. The Appointment Length, Appointment Reason and Returning Reason can be set in the top-third of the window. The appointment length will default to that of the slot, but as you update appointment reasons, the relevant length will be shown. Choose the relevant answers from the drop-down menus. Below is an example of a searched for record:

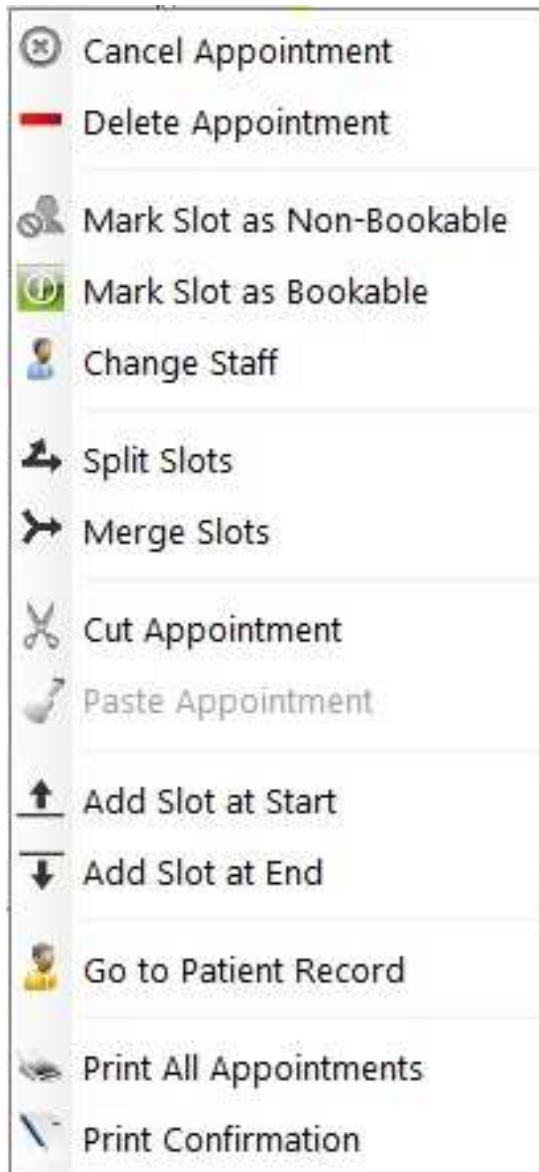
The screenshot shows a software interface for patient management. At the top, there are buttons for 'Select' and 'Update Patient', and a date/time display: 'Wednesday 09 September 2015 09:35'. Below this is the 'Appointment Details' section with fields for 'Search Px' (gra.chr), 'Room' (Test Room (B)), 'Optom', 'Returning', 'New Px' (checkbox), 'Length' (35), and 'Reason' (NHS Standard ST). A 'Notes' field is also present. The 'Search Results' section shows a table with columns: Patient Ref, Surname, First name, Date of Birth, Address, Mobile Phone, and Deceased. The first row is highlighted: 12969, Gray, Chris, 06/08/1984, 32 church street, 07905711240. The 'Px Record' section shows patient details: Surname (Gray), First name (Chris), D.O.B (06/08/1984), 31 yrs, Gender (Male), Title (Mr), Address (32 Church Street, Malvern, Worcs, WR14 2AZ), Home Phone (01684577900), Mobile Phone (07905711240), Email (chris.gray@optinetuk.com), and Next NHS Test Due (03/09/2016). Below this is a table for 'Cancellations & Failures' with columns: Date, Time, Status, and Appointment/Cancellation Reason. The table shows three entries: 03/09/2015 11:55 Cancelled ill, 27/08/2015 10:10 Cancelled missed bus, and 20/08/2015 13:00 Cancelled holiday. The 'Patient Recalls' section shows a table with columns: Description and Recall Date. The table shows three entries: Aftercare12 (03/03/2016), Aftercare12 (21/02/2016), and Child (03/09/2016). The 'Patient GOS Entitlements' section lists various entitlements, including 'Over 60', 'Over 70', 'Under 16', 'Full Time Student', 'Income Support', 'Income Based Job Seekers Allowance', 'Universal Credit', 'Employment Support Allowance', 'Pension Credit Guarantee Credit', 'Tax Credit Exemption Certificate', 'HC2 Certificate', 'HC3 Certificate', 'Registered Blind / Partially Sighted', 'Diabetes Sufferer', 'Glaucoma Sufferer', 'Glaucoma Risk', 'Over 40 - Related to Glaucoma Sufferer', 'Complex Lenses', and 'Prisoner on Leave'. There are also five stars (red, yellow, green, blue, black) next to the patient's name.

The Patient GOS entitlements are also shown on the screen, in the right-hand quarter of the screen. Age related entitlements (Under 16, Over 60, Over 70) are populated automatically. Hold down **Ctrl** and click to select multiple entitlements. Patient recalls (i.e. are they due?) are shown in the top-right corner and appointment history (e.g. are they a serial canceller?) are shown at the bottom of the screen.



Stars are also shown, along with all the details you could need at a glance. Note: If a patient is trying to book an NHS test, but they are not yet due, FLEX will warn you: this is shown to the left.

## Modifying an Appointment Slot



A single right-click on a slot brings up this menu: let's look at the functions:

When **Cancel Appointment** is selected, a box will be displayed asking for a cancellation reason. Enter the reason and press **Save**. This will be stored in the patient record under "Preferences", and shown when an appointment is booked in the future.

When **Delete Appointment** is selected, a box will be displayed asking if you are sure you wish to delete the appointment. *Delete is normally used for "in-house" errors or updates, whilst cancellations are noted on the Patient Record.*

A slot can be marked as **Non-Bookable** if required, for example for Staff Training, a

Fire Drill etc. Right-click, choose "Mark Slot as Non-Bookable" and select a reason.

A slot can be marked as **Bookable** again if it was previously changed, just right-click on the slot and select the option.

Pressing **Change Staff** allows the appointment(s) selected to be given a new staff member, which can be chosen from the resulting list which appears.

With **Split Slots**, an (e.g.) 30 minute appointment can be made into a 20 then 10, 15

then 15 etc. Default is 50% - 50%. A box will show the original slot and using the boxes / arrows you can choose the split of the resulting slots.

With **Merge Slots**, individual slots can be made into one larger appointment. Hold down the **Ctrl** key and single left click the slots to merge, release **Ctrl** then right click and choose Merge Slots. It will ask you if you are sure you want to Merge? Choose.

If you wish to move an appointment, the **Cut & Paste Appointment** functions can be used. Right-click Cut, find the new desired appointment time, Right-click Paste.

**Add Slot at Start** creates a new, default length appointment at the start of the day.

**Add Slot at End** creates a new, default length appointment at the end of the day.

You can print the A4 "clinic" by pressing "**Print All Appointments**".

You can also click "**Print Confirmation**" and a slip for the appointment time you selected will print if you have a receipt printer (otherwise it goes to your A4 printer).

## Modifying a booked Appointment

To modify a booked appointment, double (left) click on it. The window below appears:

Appointment booked on: 09/09/2015 by Optinet Staff Member

This screen is usually used for changing an appointment reason, adding a Returning reason or adding notes, although you can also **Update Patient** details through here. When you are done, click **Save** in the top-left corner.

## Looking Ahead



The "Jumper" at the top-right of the window allows you to:

- 1) Skip back a week
- 2) Skip back one day
- 3) View today
- 4) Skip forward one day
- 5) Skip forward one week.



Alternatively, you can select a date from the calendar on the far left-hand side of the window. The "Calendar" allows you to view any date using the < and > buttons. NB: *Sundays and Bank Holidays are shown in Green*

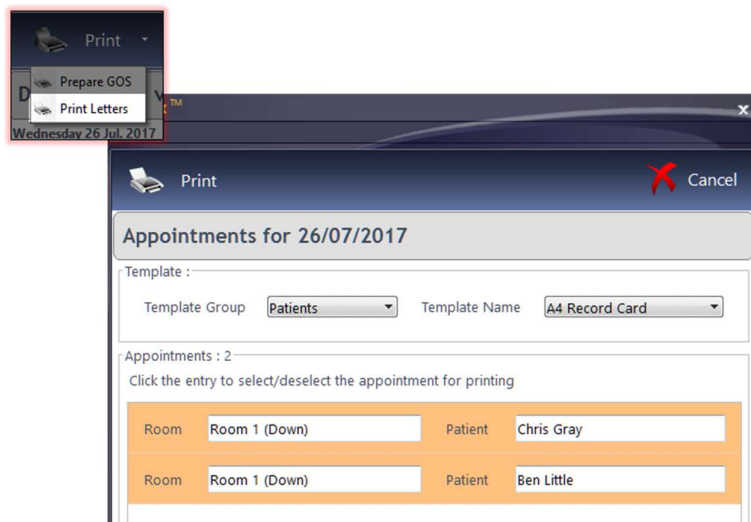


## Print

This button brings up two options:

**Prepare GOS** allows GOS paperwork for NHS Appointments for the day to be printed. When the button is pressed, a list of all **NHS Patients** who are booked in for **NHS Appointments** will appear, all selected by default. Patients can be de-selected, by single clicking on their name, or re-selected by clicking on their name again. A running total is shown at the top of the page. The patients shown in a sandy coloured bar are the ones who are selected. When Print is then pressed within Prepare GOS, it will ask which form you would like to print.

**Print Letters** allows documents and letters to be printed from the appointment diary for a selection of patients in a clinic, in the same way that GOS forms can be. Select the Template Group and then the Template Name. This is shown below.

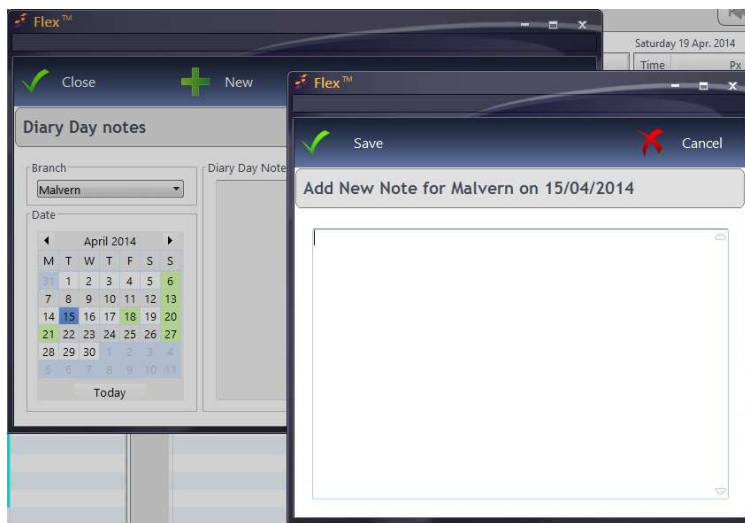


Pressing **Px Record** goes to the Patient Record.

## **Day Notes**

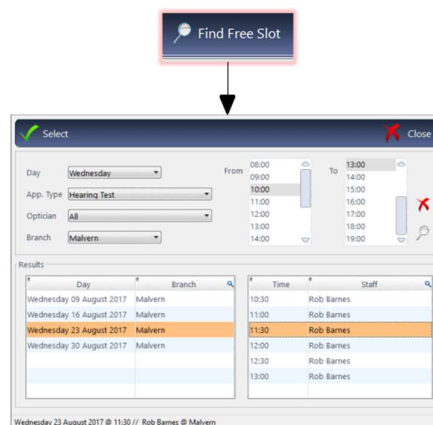
Press the Day Notes button at the top of the Appointments screen. The box below will be shown. The button on the first window that comes up will give you the option to create a **New** note or **Update** an existing note if there is one on the day already.

The Day Note added then appears at the bottom of the day in a pale yellow colour (like a "Post-It" note) in the Diary and also at the top of the "Arrivals" widget on [The Home Screen](#)



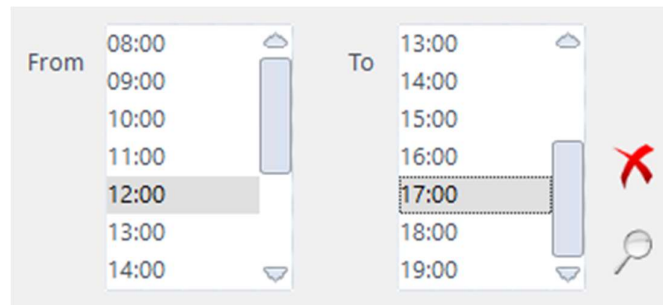
## **Find Free Slot**

When booking an appointment, you can find a free slot in the diary by clicking 'Find Free Slot'.



A window will pop up (see above) that will allow you to search for any free slots that are available. Use the drop-down menus at the top left to select the day of the week, appointment type, member of staff and branch. Then, select the appropriate time ranges in the boxes to the right.

*For example, if the patient would like to be seen any time after midday, select 12.00 in the left hand box and the final slot time in the right hand box (see below).*



The image shows a user interface for selecting time slots. It consists of two vertical lists of time slots. The left list is labeled 'From' and contains times from 08:00 to 14:00 in one-hour increments. The right list is labeled 'To' and contains times from 13:00 to 19:00 in one-hour increments. In the 'From' list, the 12:00 slot is highlighted with a grey background. In the 'To' list, the 17:00 slot is highlighted with a grey background. To the right of the 'To' list, there is a red 'X' icon and a magnifying glass icon. Both lists have a vertical scrollbar and a small upward-pointing arrow at the top and a downward-pointing arrow at the bottom.

Then, click the magnifying glass icon at the far right of this window to search for free slots.

If there are free slots available for the criteria you have chosen, the results will show up in the box at the bottom left. Click the day the patient would like and then, the next window will be populated with the time slots available.

If one of the time slots is suitable, highlight it by left clicking and then click 'Select' in the top left corner to book the slot. You will then be presented with the appointment booking window.



## Till

Click "Till" on the left-hand side of FLEX to bring this module up. If the Dispense and Order modules of FLEX are being used, the balance due from the patient for the items dispensed and ordered will be carried over to the till. It will be itemised on the right hand side of the screen. Note that the name of the patient appears towards the top of the screen. All historical receipts are shown in the **Active Px Receipts** on the left-hand side.

If the modules are not being used, double-click the patient to be used from the Active Patient list (under the **Patients** tab) and then press **Patient Sale**. **This is very important – if it is not pressed, you will charge items to a different patient.** A new receipt for a patient can also be created by pressing the little down-pointing triangle just to the right of Patient Sale.

The screenshot displays the FLEX software interface for a till transaction. The top navigation bar includes options like Home, Mgr. Home, Patient Sale, Non Patient Sale, Print Receipt, Email Receipt, Petty Cash, Cash up, and Override. The main area is titled "Till: Mr Chris Smith" and shows a receipt number of 46952. The "Date Details" section indicates the date is 15/04/2014 and the time is 15:51. The "Staff Details" section shows the staff member as "Optinet Staff Member". The "Balance to Pay £:" is prominently displayed as 495.00. The "Items on Receipt:" table lists the following items:

Description	Amount
Vx Comfort NE 1.50	£169.00
Vx Comfort NE 1.50	£169.00
Ray.Ban 5184 Col 5160 Tortoiseshell Size	£157.00

The interface also features a grid of buttons for selecting services: FEES, ACCESSORY, SOLUTIONS, REPAIR / PARTS, SUNGLASSES, FRAME, LENSES, Contact Lens, and Payment. A "Top Level" button is also present. The left-hand navigation menu includes options for Patients, Appointments, Dispense, Orders, Till, Active Px Receipts, Find Receipt, Stock, Business Intelligence, and Management.

If the Dispense / Order modules are not being used, the items to be purchased must be entered manually. This can be done by clicking on the relevant "Cost Centre" (for example FEES, SOLUTIONS etc.) button. The buttons will:

1. Ask for a stock item to be picked from a list,
2. Ask for a price to be entered,
3. Charge a set amount for an item straight away.
4. Take you to another level of buttons. (You can press **Top Level** to get back to the start).

If a sale is not for a patient (i.e. Cash Sale / Walk-In), it is classed as a **Non-Patient Sale**. Click **Non-Patient Sale**: a new receipt will be created and there will be no patient name in the top-left corner.

## Payment

Please note that the Till buttons will vary in layout, colour and text depending on how your system has been [Setup](#), however the process for taking payment for a **Patient Sale** or a **Non-Patient Sale** is the same.

All the payment methods (CASH, VISA/MASTER, AMEX, CHEQUE) work in the same fashion, giving you the option to enter a default amount, the exact balance or a balance that you set using the box shown below. This appears when any payment method button is pressed.



If there is an amount left to pay (for example £14.50) and £20 is selected, a box will come up advising the amount of change to give (in this example, £5.50).

To pay with an NHS voucher, press the NHS VOUCHER button on the Till (your label may vary, e.g. NHS, VOUCHER, GOS). A box comes up showing the different amounts.

Select the correct row, and that amount will be taken off the balance owing (i.e. the cost of the lenses etc. has to be rung through first).



To **Print a Receipt**, simply press the button shown below (left). This can print to A4 or Receipt roll paper, depending on your [Setup](#) . Press **Email Receipt** to start sending an email. The receipt will be attached "in the background" as a PDF file. If the Patient has no email address on their record, it will ask for one and then retain it.

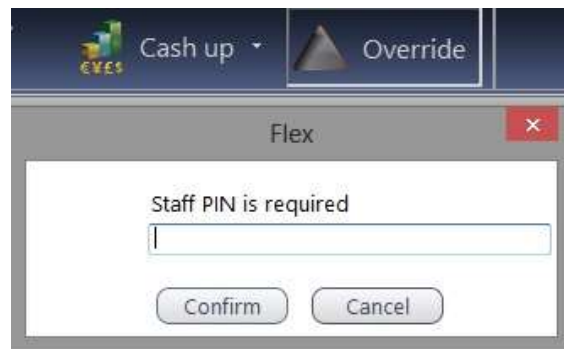


## Over-ride

The over-ride function allows the "Cashier" a variety of functions.

*Note: Users may or may not be able to use the full functionality of over-ride if they are not given the permissions in the Setup .*

To access the screen, double click on the item to be edited, or press **Override**. Staff PIN is required. Enter this and press confirm. *The Staff PIN can be entered by any staff user with access to the features, and does not have to be that of the current user.*



The over-ride screen is shown below the PIN screen.



**Credit:** A checkbox can be selected to credit the item, which will then appear as a negative balance on the receipt. This is used in tandem with Refund:

**Refund:** A box comes up asking if you want to give a refund, and the amount to process. This is used in tandem with Credit.

**Change Amount:** A box comes up asking you to enter a new total. Example of its use would be an item is scanned through as being £8.50, but was recently changed to £9.99.

**Discount:** Discounts can be applied in 2 ways. **Line Discount** - Discounts a single item (Line) on the till receipt. OR **Total Discount** - Discounts every item on the receipt. (Note : Total Discounts are % Only).

***Line Discount:***

***Click the item*** you wish to discount, it will be highlighted orange when selected.

***Click Line Discount*** at the Top of the screen.

***Click the discount type*** you wish to apply, again it will be highlighted orange when selected.

***Click Select***

*The type of discount and the new selling price will then be displayed against each item in the discounts window (as shown below.) Once all line discounts have been applied, click **Apply** to add these discounts to the receipt.*

***Total Discount:***

***Click Total Discount*** at the Top of the screen.

***Click the discount type*** you wish to apply, it will be highlighted orange when selected.

***Click Select*** The type of discount and the new selling price will then be displayed against each item in the discounts window (as shown below).

***Click Apply*** to add these discounts to the receipt

**Void:** A checkbox can be selected to void the item(s). We urge caution here, as it effectively deletes the item. Credit / refund should be used to correct mistakes.

## Petty Cash

The Petty Cash function allows users to log and record small amounts of money taken out the till (for example for Newspapers, Milk, Stationery...)

To make an entry, press **Petty Cash** to open the window, select the date (default is today), click into **Date** and **Time** and the current date and time are automatically added.

Next, find the staff members name from the drop-down list in the column titled **Given to**. A **Description** can be entered - for example Milk, Newspapers.

Select the **Group** (customisable in [Setup](#)) and enter the Gross Amount (and VAT will be worked out if applicable).

The window is shown below. To delete an entry, right-click on it and choose **Delete**.

The screenshot shows a software window titled "Flex" with a "Close" button in the top left corner. The main area is titled "Petty Cash Entries". At the top of this area is a calendar for August 2014, with the 19th selected. Below the calendar is a table with the following columns: Date, Time, Given to, Description, Group, Gross Amount, and VAT Amount. The first row of the table contains the values: 19/08/2014, 13:47, a dropdown arrow, an empty text field, a dropdown arrow, £0.00, and £0.00. There are several empty rows below the first one. A "Today" button is located below the calendar.

## Cashing Up

Cashing Up can be done as many times a day as needed. Some practices cash up at the start of the day, most at (or towards) the end of each day.

FLEX accommodates any cashing-up regime. To cash up the [Till](#), start by clicking the **Cash Up** button. Previous dates can be viewed (see bottom of page) in **View Previous**, but we will choose **Cash Up The Till**. *Enter the Opening Float if prompted - it should auto-populate with yesterday's closing float.*



This is the first screen (of 2) you will see: (note last cash-up date and time are shown)

### Left-hand "third"

Additional Float can be entered.  
Further [Petty Cash](#) can be entered.

### Central "third"

Enter all the notes and coins in the Till  
(This *should* equal the float plus the cash sales, less any petty cash drawn)

### Right-hand "third"

Enter the amounts taken for each "non-cash" payment method. Usually this is from a z-reading from your card machine, and by counting the value of cheques.

After these details have been entered, this is the second screen (of 2) you will see:

Payment Method:	Computed Amount:	Manual Amount:	Difference
Cash	£5.00	£5.00	£0.00

Banking and Float

Additional Float: £0.00

Closing Float: £20.00

To be banked (Cash): £5.00

To be banked (Chq): £0.00

Notes

This will reconcile everything that has been entered. Discrepancies will show up in a red band. Amendments can be made to the **Banking and Float**. By default, the Closing Float will be the same as the opening one. You will see the amount of Cash and Cheques to be banked.

The **Cashing Up Summary** and/or **Petty Cash** reports can be printed from here.

They are also available in the [Reporting](#) section of [Business Intelligence](#).

When you are happy, press **Save**. **It will ask** Do you want to lock the cashing up?

**If you do lock, you will not be able to amend any of the transactions up until that point.**

Are you sure you want to lock? Press **Yes, Lock** (or **No, Cancel**) and the cashing up is complete.



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## To View Previous Records

Select "**View Previous**" from the **Cash Up** menu. The window below is displayed and a date can be selected. This brings up the "2 steps" window again. Records will only be shown here once they have been "Locked", and **ReadOnly** will appear at the top of the screen for reference.



Date	Opening Float	Closing Float
09/10/2013	£30.00	£30.00
10/10/2013	£30.00	£30.00
11/10/2013	£30.00	£30.00
12/10/2013	£30.00	£0.00
14/10/2013	£30.00	£30.01
15/10/2013	£30.01	£30.00
16/10/2013	£30.00	£30.00
17/10/2013	£30.00	£30.00
18/10/2013	£30.00	£30.00
19/10/2013	£30.00	£30.00
21/10/2013	£30.00	£30.00

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## To Print

The **Cashing Up Summary** can be printed through the [Business Intelligence](#) - > [Reporting](#) if users have access, or by going back into **View Previous** and pressing **Print** in the top-left corner.

## Locking and Unlocking

Receipts which have been fully paid off are automatically locked to prevent mistakes being made. Receipts are generally only unlocked if there is a balance on them.

If this is a new transaction it is better to create a new receipt (See [How To I Create A New Receipt?](#)) To Unlock an old receipt...

- Double Click the Padlock Icon on the Till Receipt.
- Enter Your Pin Number.
- The receipt is now unlocked.



To Re-lock the receipt, repeat the above three steps. The button is shown above.

## Collecting

An item needs to be marked as collected to update the status of the NHS Voucher for processing. It's good practice to mark all items as collected as and when they have been collected. All Sight Test fees are marked as ready to be claimed automatically, but frames and lenses etc. need to be marked as collected on the Till before the money can be claimed.

To mark an item as collected, double-click on the shopping bag towards the top of the Till screen, the button is shown to the right:



**It will ask for a collection date to be entered.**

Once a date has been selected, the check-box will be ticked, and hovering over it will show the collection date. This is to the right:



**For further help, check out the portal at [www.optinetuk.com/support](http://www.optinetuk.com/support), or give us a call on 0800 310 2400. Finally, may we wish you the very best of luck with FLEX!**