Optinet™

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

A guide to building and updating your Clinics in FLEX from Optinet.

Prepared by Chris Gray – chris.gray@optinetuk.com

Introduction

The Appointments Diary is one of the most customisable parts of FLEX, therefore there are several distinct aspects to explain.

The first screen seen when the **Appointments** tab in the **Setup** menu is selected is shown below: It is the first part of a "Wizard" which helps customise the Diary step by step. However, it is worth noting that barring the "**Staff Planner**" tab on the top-bar (which takes you straight to step 5 of 5), all the other top menu bar buttons work independently to the wizard. The online help system can help here!

Step One

The Diary setup uses a wizard process to help you create your appointment slots step by step

The **Branch** description (multiple branches available in FLEX+) can be updated and the **Opening Hours** / Days changed. Double click within the text (for example *Monday* or *17:00)* to update the values. If you try and build appointment slots outside of your opening hours / days, it will warn you when building the diary.

Step Two

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Add your consultation rooms here

The **Consultation Rooms** can be added to and updated in the second screen, for example some practices prefer to use Optom names, not Room names. Double click within the text (for example *Oak Suite)* to update the values. Double-click in the blank space below current rooms to add a new room, or un-check **Active** to remove from the Appointments screen. The **Order** of these rooms can also be set (the first one is shown closest to the left hand side in the Diary proper).

Step Three

Add your Appointment reasons here

This is a sample of the colour combination you have selected

The **Appointment Reasons** can be added to and updated in the third screen. Double click within the text (for example *Emergency)* to update the values. Double-click in the blank space below current reasons to add a new reason.

The **Background Colour** and **Foreground Colour** can be updated to your own preferences, and a sample of the colour combination is shown at the bottom of the screen. *Tip: Do not use the same foreground and background colours!*

The check-boxes at the end, **Supress ST** and **Supress CL** will stop a Sight Test or Contact Lens reminder being sent out when an appointment is booked. For example: if Mrs Jones has a sight test reminder due to be despatched in three weeks time but she has come in to book an appointment, the letter will be cancelled. The time when reminders are sent out can be customised within the Timeline setup.

If you want a slot to appear as non-bookable (e.g. Lunch), choose this from the drop-down in the final column. The Non-Bookable reasons can be set here

Step Four

Setup Diary   Step 4/5: For your groups, enter testing times for each reason for each member of staff

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Staff Hour Group		Staff Hours					
Group Name	▶	Group ▼	Staff ⬍	Reason ⬍	Start	End	Length ▶
FLEX Testing		FLEX Testing	Optinet Staff Member	Sight Test	09:00	13:00	30
		FLEX Testing ▼	Optinet Staff Member ▼	Lunch ▼	13:00	14:00	60
		FLEX Testing	Optinet Staff Member	Sight Test	14:00	17:00	30

Select when each staff member carries out each type of appointment. You can group these together to create a template.

In the fourth screen, **Staff Hours** can be set. You can select when each staff member carries out each type of appointment. You can group these together to create a **Staff Hour Group** template. The first three columns have drop-down menus according to the **Group** (set on left-hand side of screen), **Staff** member and **Reason.** The final three boxes are "free-text" and can be updated accordingly, but must all balance: for example 3 x 30 minute slots could fit into 90 minutes, 4 x 20 minutes would bring back an error. Create a new **Staff Hour Group** for each member of staff and their schedules, for example "John Mon-Fri", "John Sat", "Mandy Mon+Wed", "Mandy Tue+Fri"

Step Five

In the final screen of the wizard, all the information previously entered is combined into the **Room Planner** to create your diary. The **Branch** and **Room** can be chosen, the **Group** selected and then the **Defined Working Hours** dragged into the **Staff / Room** planner.

The dates to be filled out need to be selected using the Calender (**Date**) box. Press the **Shift** key to select multiple dates, but be aware this may include days you are not open (e.g. Sundays). You can hold down the **Ctrl** key to pick individual dates, or to exclude days (e.g. Sundays).

The diary can automatically built ahead each week. In the Data tab of the Branch setup, the number of weeks to be auto-generated is set (default is 12). The dates to populate with appointments have to be selected in the calender. Use the **Ctrl** key to select certain dates (e.g. weekends), or the **Shift** key to select every day within the calender.

 This is something we recommend remote training for: call us on 0845 313 0233 if you get stuck!