

Optinet™
FLEX
ADVANCED PRACTICE MANAGEMENT SOFTWARE



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

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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

Setup DiaryStep 1/5: Select a branch and enter opening hours

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Branch

Description
DefaultSCOTT

Opening Hours

Day	Open Time	Close Time
Monday	09:00	17:00
Tuesday	09:00	17:00
Wednesday	09:00	17:00
Thursday	09:00	17:00
Friday	09:00	17:00
Saturday	09:00	17:00

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

Setup Diary

Step 2/5: Enter the names of your consultation rooms

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Room Name	Display Order	Active
Oak Suite	1	<input checked="" type="checkbox"/>
Pine Suite	2	<input checked="" type="checkbox"/>

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

Setup DiaryStep 3/5: Enter the appointment reasons

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Appointment Reasons

Reason Description	Length	Background Colour	Foreground Colour	Suppress ST	Suppress CL	Display Order	Non Bookable
Sight Test	30	Blue	White	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	
Contact Lens Check	30	Indigo	White	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2	
Emergency	30	Red	White	<input type="checkbox"/>	<input type="checkbox"/>	3	
Lunch	30	Black	Black	<input type="checkbox"/>	<input type="checkbox"/>	4	Lunch

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, **Suppress ST** and **Suppress 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

Setup Diary Step 5/5: Select Branch, Room and Group and Date. Drag the times onto the Room Planner to create your diary

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Consulting Room

Branch: DefaultSCOTT

Room: Oak Suite

Select Group

Group: FLEX Testing

Date

May 2015

M	T	W	T	F	S	S
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today

Staff / Room Planner

Week 21

	Monday 18 (N	Tuesday 19	Wednesday 2	Thursday 21	Friday 22	Saturday 23	Sunday 24
7:00							
8:00							
9:00					Oak Suite OSM		
10:00							
11:00							
12:00							
13:00					Oak Suite OSM		
14:00					Oak Suite OSM		
15:00							
16:00							
17:00							

Defined Working Hours

Staff	Description	Start	End	Length
OSM	Sight Test	09:00	13:00	30
OSM	Lunch	13:00	14:00	60
OSM	Sight Test	14:00	17:00	30

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 Calendar (**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 calendar. Use the **Ctrl** key to select certain dates (e.g. weekends), or the **Shift** key to select every day within the calendar.

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