

# FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE



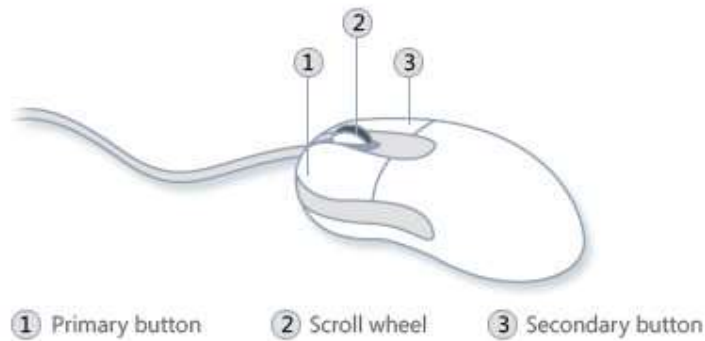
**FLEXercises – to be used in tandem with the FLEX Basics Workbook**

Prepared by Chris Gray – [chris.gray@optinetuk.com](mailto:chris.gray@optinetuk.com)

At Optinet, we recognise that using a new piece of Practice Management Software like FLEX is a big step to take. We're also aware that our users are from a whole host of backgrounds, with a different level of computer knowledge and understanding. This booklet talks you through the basics of the keyboard and mouse commands. This booklet goes on to some basic exercises in FLEX to help you use what you have learnt.

## The Mouse

A mouse on a Windows machine typically has two buttons: a **primary button** (usually the left button) and a **secondary button** (usually the right button). You will use the primary button most often. Most mice also include a **scroll wheel** between the buttons to help you scroll through documents and webpages more easily. Advanced mice might have additional buttons that can perform other functions. These additional buttons are not used in FLEX.



## Pointing

Pointing to an item on the screen means moving your mouse so the pointer appears to be touching the item. When you point to something, a small box often appears that describes the item. This is called a ToolTip and are used in FLEX to help identify what buttons do.

There are four basic ways to use your mouse buttons: (left) clicking, double (left) clicking, right-clicking, and dragging.

## **Single-clicking**

To click an item, point to the item on the screen, and then press and release the primary button (usually the left button).

Clicking is most often used to **select** (mark) an item or open a menu. This is sometimes called **single-clicking** or **left-clicking**.

## **Double-clicking**

To double-click an item, point to the item on the screen, and then click twice quickly. If the two clicks are spaced too far apart, they might be interpreted as two individual clicks rather than one double-click.

## **Right-clicking**

To right-click an item, point to the item on the screen, and then press and release the secondary button (usually the right button). *You will never double-click the right button.*

Right-clicking an item usually displays a list of things you can do with the item. If you're ever unsure of what to do with something, right-click it.

## **Dragging**

You can move items around your screen by **dragging** them. To drag an object, point to the object on the screen, press and hold the primary button, move the object to a new location, and then release the primary button.

Dragging (sometimes called **dragging and dropping**) is most often used to move files and folders to a different location and to move windows and icons around on your screen.

## The Keyboard

FLEX is mostly mouse based, but the keyboard is often used, for example when searching for patients or typing in your PIN. The keyboard is also used when you need to multi-select something. Examples of this in FLEX would be to select multiple appointment slots or multiple GOS Entitlements.



The **Escape** key is used when you have typed something into a line and wish to get out of it.

The **Tab** key (not highlighted) is used to go to the next box in a form or table.

The **Shift** key is used to select multiple entries from a list. (Single left) Click the first item on the list, hold down **Shift**, (single left) click the last item in the list and release **Shift**. All items are now selected. Hold down **Shift** to create a capital letter, or the symbol above what is shown on the keyboard, e.g. Shift + 1 creates an exclamation mark (!).

The Control (**Ctrl**) key is used to select specific entries from a list. (Single left) Click the first item on the list, hold down **Ctrl**, (single left) click the items in the list you want to select, and when complete release **Ctrl**. All desired items are now selected.

Open up the **My Documents** folder in Windows and have a go at using the **Shift** and **Ctrl** functions.



**PAUSE**

*If you or your practice have a demonstration copy of FLEX, please now refer to the "FLEX Basics" booklet to have a look through the basic modules – Patients, Appointments and Till. If you don't have a copy of FLEX, you can see our online help system for pictures, videos and demonstrations – type <http://help.optinetuk.net> into your browser. Your software trainer will ask you to carry out the actions detailed over the rest of this booklet on your training day.*

## **FLEXercises: The Home Screen**

Let us now use what we have learnt in this tutorial and the FLEX Basics workbook to attempt some basic tasks in FLEX.

- 1) Log in to FLEX with the details you have been given.**
- 2) Search for a patient in three different ways.** Use your own or a given record.
- 3) Demonstrate what the "Arrivals" section does.**
- 4) Create a Staff Task for yourself.** Content: Practice using FLEX this week.
- 5) Change what you see on the home screen.** Put "Timeline" on the bottom-right.

## **FLEXercises: Appointments**

Let us now use what we have learnt in this tutorial and the FLEX Basics workbook to attempt some basic tasks in FLEX. *Don't worry if your diary times are slightly different to our example.*

- 1) Book an appointment at 14:00 for an existing patient in FLEX.**
- 2) Book an appointment at 16:00 for a new patient in FLEX.** Create you or your pet!
- 3) Cancel the first appointment you created.** Reason: "FLEX Testing".
- 4) Mark the 09:00 slot as non-bookable.** Reason: "Closed".
- 5) Split the 10:30 slots.** The first slot should be 10 minutes, the second 20.
- 6) Merge the 15:00 and 15:30 appointments into one.**
- 7) Cut the 16:00 appointment and paste it in to 09:00 tomorrow.**
- 8) Add a Day Note for today.** The note should say "<my name> testing FLEX".

### **FLEXercises: Patient Records**

Let us now use what we have learnt in this tutorial and the FLEX Basics workbook to attempt some basic tasks in FLEX.

- 1) Go to the Record for the patient created in the Appointments exercise.**
- 2) Update their GOS Entitlements to “Over 60” and “Prisoner on Leave”.**
- 3) Enter an email address for the patient.**
- 4) Assign a Blue Star to the record.**
- 5) Assign the patient to a Doctor and Surgery.** Enter details of a local one.
- 6) Save your changes.**

### **FLEXercises: The Till**

Let us now use what we have learnt in this tutorial and the FLEX Basics workbook to attempt some basic tasks in FLEX.

- 1) Go to the Record for the patient updated in Patient Records.**
- 2) Create a new receipt for this patient.**
- 3) Charge three different items onto their receipt.**
- 4) Void off the last item put onto the receipt.**
- 5) Give a discount on the first item put onto the receipt.**
- 6) Take full payment for the remaining balance.**
- 7) Mark the item as collected.**

## Answers Section

### **The Home Screen**

- 1) From the desktop, double click on the "Flex" icon, enter your Staff ID, your PIN and your Branch, then press Login. From the lock screen, simply enter your PIN.
- 2) To search for Chris Gray, use either his patient reference number, his surname or the first three letters of his surname, a comma, and the first three of his first name, i.e. "Gra,Chr".
- 3) Right click and choose the ☺ face when a patient has arrived, ☹ if they have failed to attend or the (x) to mark that a patient has cancelled.
- 4) Click onto New, the date, time and your initials are automatically populated. Enter the task details and press Save.
- 5) Click onto Change Widgets, choose Timeline from the list on the left and with the Use this Widget button, place it Bottom Right. Click Save when complete.

## Appointments

- 1)
  - Click to "Appointments".
  - Double-click the 14:00 slot.
  - Search for the patient and enter the appointment Reason. Update / enter the Length / Return reason if necessary.
  - Press "Select" to book that patient in.
  
- 2)
  - Click to "Appointments" (if not on already).
  - Double-click the 16:00 slot.
  - Tick the "New Px" button. Enter the appointment Reason etc. like in question 1. Update / enter the Length / Return reason if necessary.
  - Enter the New Patient details onto the system.
  - Press "Select" to book that patient in.
  
- 3)
  - Click to "Appointments" (if not on already).
  - Right-click the 14:00 slot.
  - Click "Cancel Appointment" and enter the reason "FLEX Testing".
  
- 4)
  - Click to "Appointments" (if not on already).
  - Right-click the 09:00 slot.
  - Click "Mark Slot as Non Bookable" and pick the reason "Closed".
  
- 5)
  - Click to "Appointments" (if not on already).
  - Right-click the 10:30 slot.
  - Click "Split Slots".
  - Adjust the spinners so the first slot is 10 minutes, the second 20.
  - Press Select.
  
- 6)
  - Click to "Appointments" (if not on already).
  - Hold down Ctrl, single-left click the 15:00 and 15:30 slots.
  - Release Ctrl, right-click merge slots.
  - Agree to the warning and press Select.
  
- 7)
  - Click to "Appointments" (if not on already).
  - Right-click the 16:00 slot.
  - Right Click "Cut Appointment"
  - Right-click the 09:00 slot tomorrow.
  - Right Click "Paste Appointment". Agree to any warning messages.
  
- 8)
  - Click to "Appointments" (if not on already).
  - Click Day Notes.
  - Select today (if not on already) and press Add
  - Enter the details, press OK and Select.



## Patients

1)

- Search for the patient record and double click it.

2)

- Press Update.
- Click "Change GOS Entitlement".
- Hold down Ctrl, single-left click the requested reasons.
- Release Ctrl, click Select.
- Press Save

3)

- Press Update.
- Enter a validated email address (@ symbol, .com / .co.uk etc at end)
- Press Save

4)

- Press Update.
- Click Stars and Choose Blue.
- Press Save

5)

- Press Update.
- Click the (...) button.
- Choose a Doctor and Surgery from the list.
- Click Select.
- Press Save.

6)

- Press Save

## **Till**

1)

- Search for the patient record and double click it.

2)

- Search for the patient record and double click it.
- Go to Till, click Patient Sale

3)

- Click three of the different Till buttons and show the differences between the buttons.

4)

- Double click onto the bottom item on the receipt.
- Enter your PIN.
- Press Void.
- Tick the box for the item to void.
- Press Apply.

5)

- Double click onto the bottom item on the receipt.
- Enter your PIN.
- Press Discount
- Select the item and press Line Discount.
- Choose a Discount, press Select. Enter an amount if required.
- Press Select and then Apply.

6)

- Click onto Payments.
- Choose Cash / Card / Cheque and select "Full Balance".
- Press Top Level to return to the main till buttons (if applicable).

7)

- Double click onto the shopping bag.
- Click onto today's date and press Select.
- Hover over the now full bag to prove the item has been collected.