



FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Online Booking User Guide

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Online Booking Overview

The **Online Appointment Booking** Facility in FLEX essentially means your practice diary is open 24/7 – your patients can book in at their convenience, but through parameters controlled by the practice.

Patients fill out a form on a webpage that can be linked to your own website, which will then be sent directly to a holding area in Flex. Then, staff members can either add or remove requested appointments.

If you would like to use **Online Appointment Booking**, please get in touch with our support team on 0800 310 2400.

Once you have been assigned a webpage, you will first need to set up your appointments to communicate with the online form.



Setting Up Online Booking


A 'QR Code' or quick response code is generated in the setup screen in FLEX. This will be the URL of the online booking site.

Generating the QR code

- Navigate to the '**Branch**' table in '**Setup**'
- Click on the '**Integrations**' tab
- Scroll down to where **Online Diary** settings are.
- Check that your '**Online Booking URL**' is present in the URL field at the bottom of the window.
- If this is not setup, then you will need to edit the branch record and enter it on the integrations tab and then save the record. (Click **Update Branch**)

Online Diary

Username	<input type="text" value="sam"/>	Password	<input type="password" value="••••••"/>
Database	<input type="text" value="Malvern-Dev"/>	Active	<input checked="" type="checkbox"/>
More Info	<input type="text" value="Any notification you want to be visible can be set in here."/>	Disclaimer	<input type="text" value="This can be something like. Your booking will be confirmed via a text message from the practice, a reminder will be sent the day before your appointment....."/>
URL	<input type="text" value="https://patientbookings.co.uk/Malvern-Dev"/>		



- Click the '**Generate QR**' button to create your QR code. You will be prompted to select a folder to save your QR code image, choose a folder and click the '**Select Folder**' button
- Once the image has been saved it will popup in the default image viewer so that you can see it, scanning the QR code below will take you to the demo site for FLEX online booking.

Your QR Code has been created and saved in your chosen location!

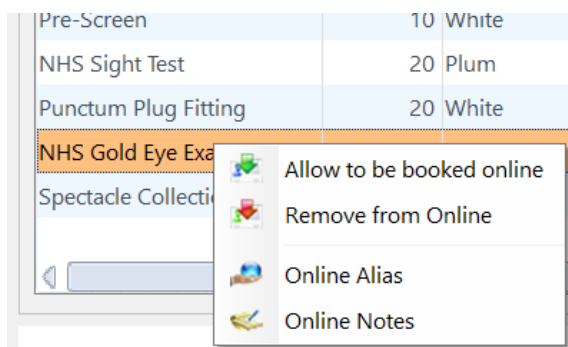


- When scanning a QR code with a smartphone, the URL will appear on the screen for your patient to tap/click

How to Make Appointments Available Online

Allowing Appointments

- In FLEX, you will need to choose which **Appointment Reasons** are available to book online. Go to **Menu – Setup – Appointments - General**.
- Click the **'Next'** button twice to get to the **Appointment Reasons** (page 3 of 5 in the wizard).
- Here, right-click any one of the appointments and choose **'Allow to be booked online'**. (You can do the same again to **Remove from Online Booking**.)



- A green box will appear in the last column of the table; this indicates that the reason has been made available.

Reason Description	Length	Background Colour	Foreground Colour	Suppress ST	Suppress CL	NHS warning	Prepare GOS	Non Bookable	Display Order	Inactive
BV Follow Up	30	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input checked="" type="checkbox"/>
Hydroxychloroquine Screening	60	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input checked="" type="checkbox"/>
Consultation	20	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input checked="" type="checkbox"/>
NHS Silver Eye Exam	30	White	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input checked="" type="checkbox"/>
Pre-Screen	10	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input checked="" type="checkbox"/>
Punctum Plug Fitting	20	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input checked="" type="checkbox"/>
Silver Eye Examination	30	Lime	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input checked="" type="checkbox"/>
ReadEz test	30	Magenta	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input checked="" type="checkbox"/>
CL Fitting	40	Navy	White	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input type="checkbox"/>
NHS Sight Test	20	Plum	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Refraction Recheck	30	Red	White	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input checked="" type="checkbox"/>
Dispensing Consultation	30	Yellow	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input checked="" type="checkbox"/>

The other options in the right-click menu are:

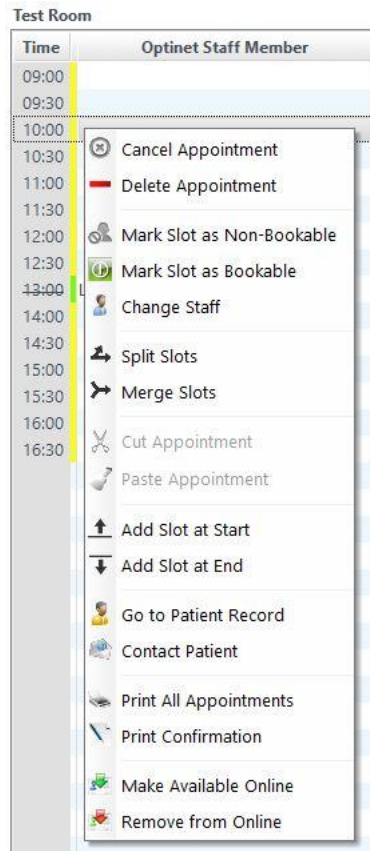
- **Online Alias:** how the appointment appears to Patients. For example, in Flex, 'Private ST' and 'NHS ST' can appear as 'Sight Exam' if that is its Online Alias, removing confusion for patients about what they need to request.
- **Online Notes:** notes which appear when the appointment reason is chosen. Usually, this is used for marketing purposes.

Make Appointments Available online

Once you have set up the appointment reasons you wish to be online, you will then need to tell the Diary which timeslots you want to make available.

You can make as many or as little as you wish available, and this can be done at your leisure.

- Right-click on a time slot. As with the appointment reasons, you can choose to **Make Available Online** (and of course **Remove from Online**).
- Once an appointment slot has been made available, a green line will appear to the right of the chosen slot/s. If they have a red line, then it means that slot/s is not available for online booking.

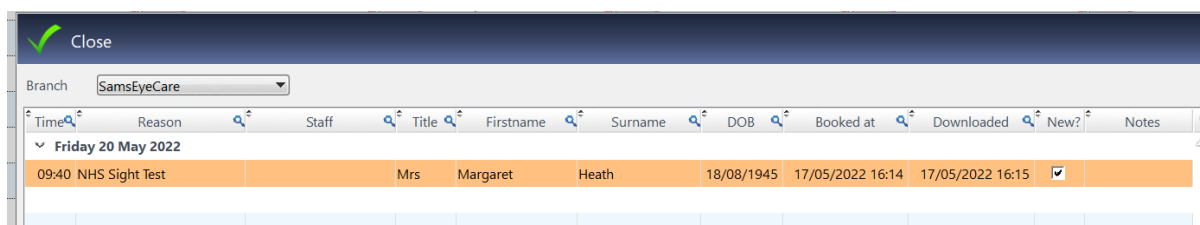


Accept/Reject Online Bookings

When a patient has booked an appointment online, the appointment(s) will go into a holding area, accessible via a button at the top of the appointment screen (As per screenshot below). The button displays a count of the amount of online booking requested that require actioning.

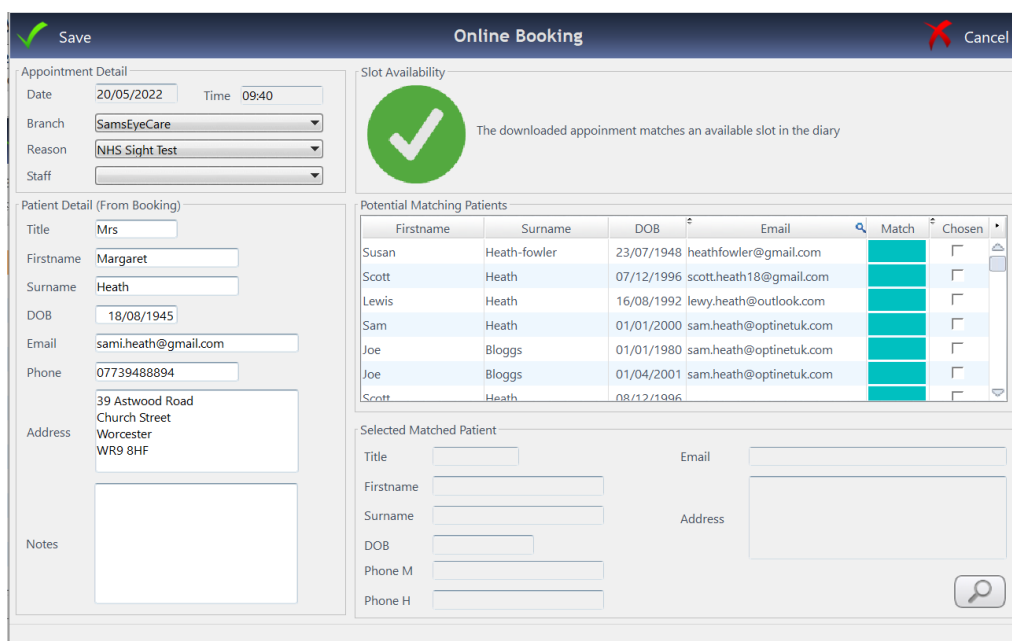


- Click the booking record 



Time	Reason	Staff	Title	Firstname	Surname	DOB	Booked at	Downloaded	New?	Notes
09:40	NHS Sight Test		Mrs	Margaret	Heath	18/08/1945	17/05/2022 16:14	17/05/2022 16:15	<input checked="" type="checkbox"/>	

- Click on the booking to view the full booking details. This will show any match with another existing patient record on the system or if new patient needs to be added.



Online Booking

Appointment Detail

Date: 20/05/2022 Time: 09:40

Branch: SamsEyeCare

Reason: NHS Sight Test

Staff:

Patient Detail (From Booking)

Title: Mrs

Firstname: Margaret

Surname: Heath

DOB: 18/08/1945

Email: sami.heath@gmail.com

Phone: 07739488894

Address: 39 Astwood Road, Church Street, Worcester, WR9 8HF

Notes:

Slot Availability

The downloaded appointment matches an available slot in the diary

Potential Matching Patients

Firstname	Surname	DOB	Email	Match	Chosen
Susan	Heath-fowler	23/07/1948	heathfowler@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scott	Heath	07/12/1996	scott.heath18@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lewis	Heath	16/08/1992	lewy.heath@outlook.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sam	Heath	01/01/2000	sam.heath@optinetuk.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Joe	Bloggs	01/01/1980	sam.heath@optinetuk.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Joe	Bloggs	01/04/2001	sam.heath@optinetuk.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scott	Heath	08/12/1996		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Selected Matched Patient

Title: _____ Email: _____

Firstname: _____

Surname: _____ Address: _____

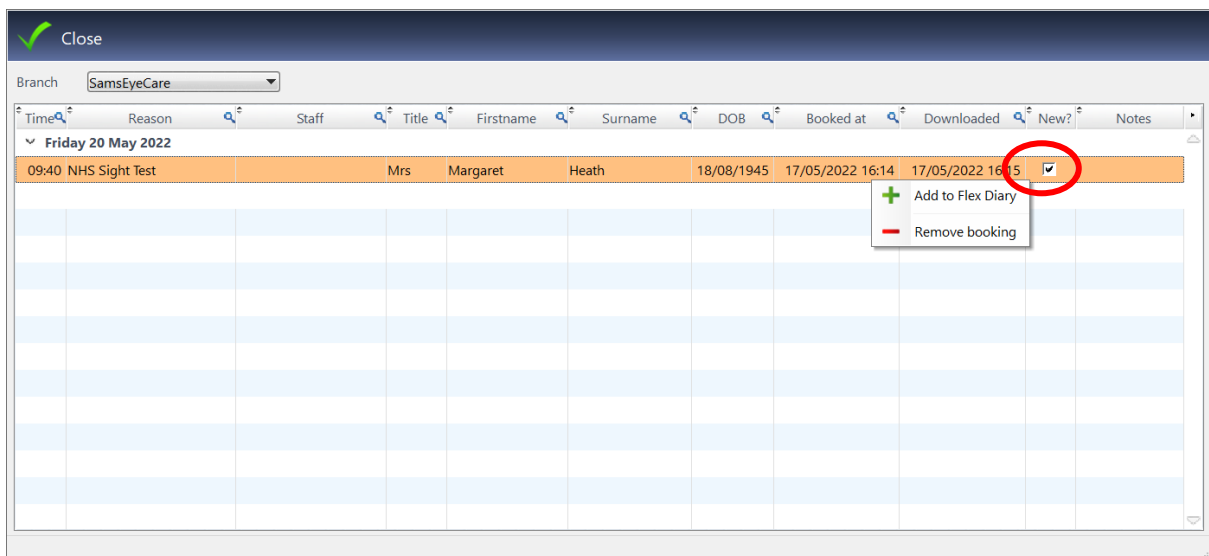
DOB: _____

Phone M: _____

Phone H: _____

- If the patient is listed on the right, click on **Chosen** in the right hand column.
- Click Save

- **Right-click** the request
- **Add To Flex Diary** (the booking will be added to the diary within FLEX, as a normal appointment).
- **Or Remove the Booking.** For Example, the appointment needs rescheduling.
- If the patient is new to the practice, simply click select.
- There will be a tick box entitled **New** which will now be ticked.
- **Right Click** the appointment to either **Add to Flex Diary** or **Remove Booking**

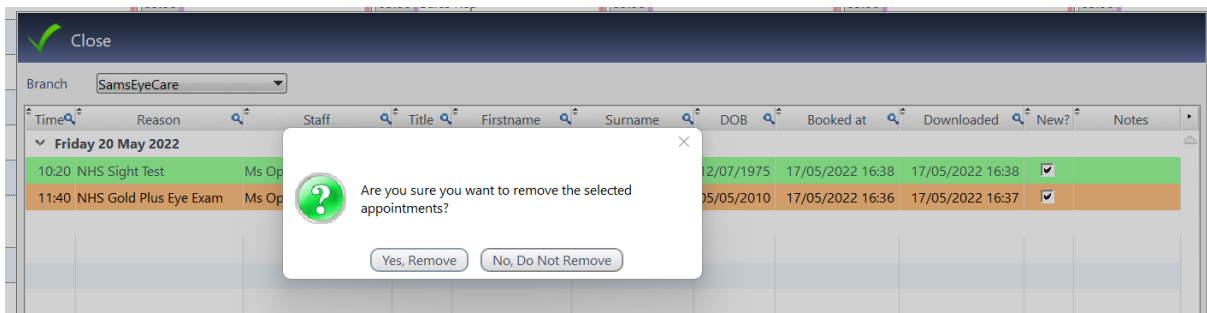


- If added, the booking will now be in the FLEX diary.

Time	Ms Optom	Tir
09:00		09:
09:40	* Mrs Margaret Heath	09:
10:20		10:

- If this is a **new patient**, a basic record will also have been created.
 - IF you have SMS setup a text will be sent to the patient according to the criteria you have put in place for text messaging.

- If you reject an appointment, you will have the following message:



- You will need to contact the patient to discuss another appointment date and time.