

Optinet™
FLEX
ADVANCED PRACTICE MANAGEMENT SOFTWARE



A guide to managing your Recalls in FLEX from Optinet.

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The Home Screen

The screenshot displays the FLEX Home Screen with a dark blue header. On the left, a 'Change Widgets' button with a star icon is visible. The main area is divided into four widgets:

- Patient Search:** Shows a search bar with 'jon.tom' and a table with columns: Ref #, Surname, First Name, Address. One row is highlighted: 23274, Jones, Tom, 79 Station Road.
- Arrivals:** Shows 'Arrivals: 0' and an empty table with columns: Time, Reason, First name, Surname, Title.
- My Tasks:** Shows 'My Tasks: 1' and a table with columns: Age, Details, Px Name, From. One row is highlighted: 043d 05h 18m, Arrange for the OCT in pre-scee..., Practice, OSM.
- Timeline:** Shows 'Show items to be sent up to 29/04/2014' and a table with columns: Type, Letters, Emails, SMSs, Postcards, Phone, Total. The data is as follows:

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

The Home screen in FLEX acts as your personalised hub. It is designed to give you easy access to all your most commonly used features on one screen.

If the "Timeline" widget, used for recalls, is not on your home screen, it can be added using the "Change Widgets" button towards the top-left of your screen. For more details on changing widgets, please see the online help file at <http://help.optinetuk.net>

You can always get back to the Home screen by pressing the button shown below; this is always in the top-left hand corner of your screen.



The window "**Timeline items to be Processed**" (shown above) will populate with all the recalls due to be sent out. Results can be sorted by clicking the column headers and searched by using the small magnifying glass on the top of each column header.

Recalls can be individually included or excluded by ticking / unticking the **Include** checkbox, or the **Include All (Exclude All)** button can be pressed.

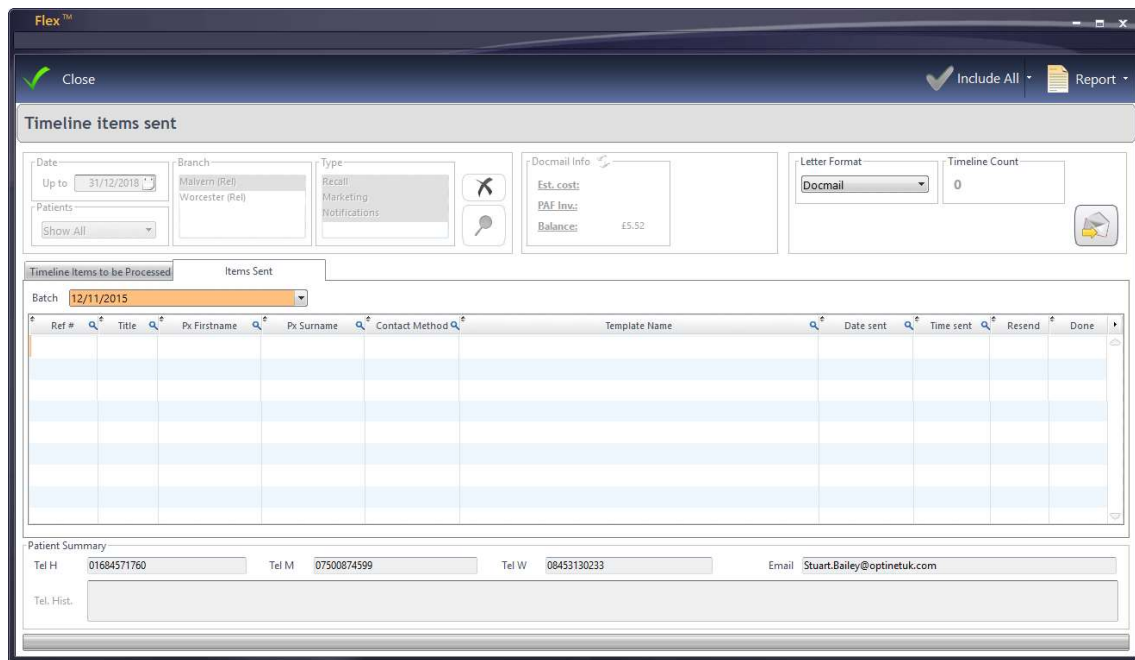
To select multiple reminders, hold down the Ctrl key on the keyboard and single left-click the entries: tick / untick the ones you wish to print.

To select blocks of reminders, hold down the Shift key on the keyboard and single left-click the first and last entries of the block you wish to print.

You can choose your recall destination under **Letter Format**. Here, you can select whether your recalls are going to be **Printed**, **Exported** (which goes into a CSV file you can use), directly to **Webpost, Docmail** or to **Labels**. The only size label that we cater for is Avery L7160 (or compatible sheets of 3 labels across by 7 labels down). To choose where exported files will go, please see [PC Settings](#)

Press the Envelope button shown towards the top-right of the screen to send the letters / emails / texts. *Please remember to have your printer ready, if you print in practice.* Once a batch has been dispatched, they are moved to "**Items Sent**". Emails and SMS messages are sent automatically, a list of telephone reminders can be printed using the **Report** button, and your reminder letters will go to the practice. If you plan to use a third party such as Webpost, please call us on 0845 313 0233.

If you need to reprint some reminders, clicking the **Items Sent** tab brings up the previously sent recalls. These can be sorted by selecting a Batch from the drop-down menu. This is shown below.



When you are happy, the Resend button appears where the Send button previously was. When you are happy with your work, press **Close**.

Reminders and Recalls Setup

There are three inherent considerations for the setup of recalls and reminder:

- *How to set up the types of templates to be sent (i.e. the content and style of letters, emails and text messages).*

These templates are found under Setup – Communication

- *The schedules of the templates to be sent (i.e. on the due date, and the increments of weeks / months and their methods going forward).*

These templates are found under Setup – Examinations – ST / CL Recall

- *The number of days before a Patient's recall due date that the reminder is generated (the scheduled date) – found in Setup – Branch - Timeline*