

Optinet™  
**FLEX**  
ADVANCED PRACTICE MANAGEMENT SOFTWARE



**A guide to Schemes in FLEX from Optinet.**

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## What is a scheme, and why are they recorded in Flex?

- Schemes are payment plans: regular monthly payments to split the cost of goods sold, usually to pay for recurring orders such as contact lenses, but can be used to split the cost of a pair of specs over a certain amount of months, or split the cost of their Eyecare, for example if they are on an Eyeplan.
- Schemes are recorded in Flex so the practice can see what goods were sold, and reconcile what they should be paid each month with their bank statement to show any discrepancies.

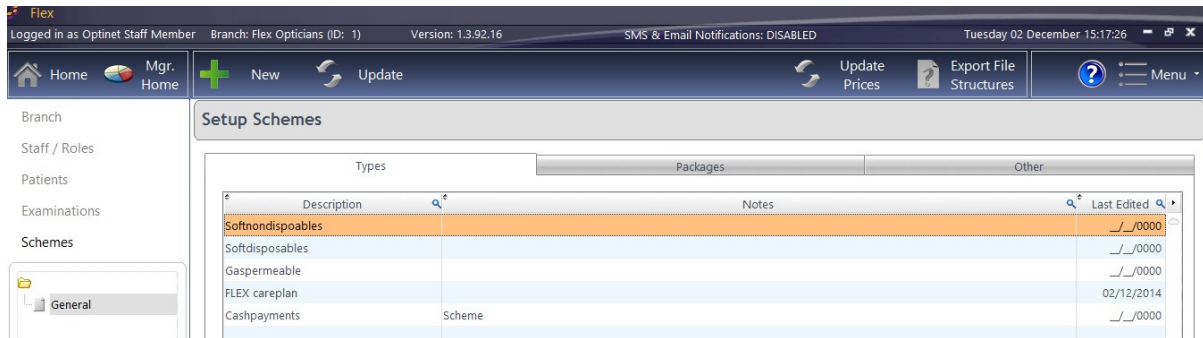
There are three main areas where schemes appear in FLEX. These are:

- Within the "Schemes" tab of [Setup](#) - **the place to start**, see [How Do I Set Up Schemes?](#)
- Within the "Contact Lens" page of the [Patient Record](#) - see [How Do I Add a Patient to a Scheme?](#)
- Within the "Schemes" tab of FLEX - see [How Do I Run / Reconcile Schemes?](#)

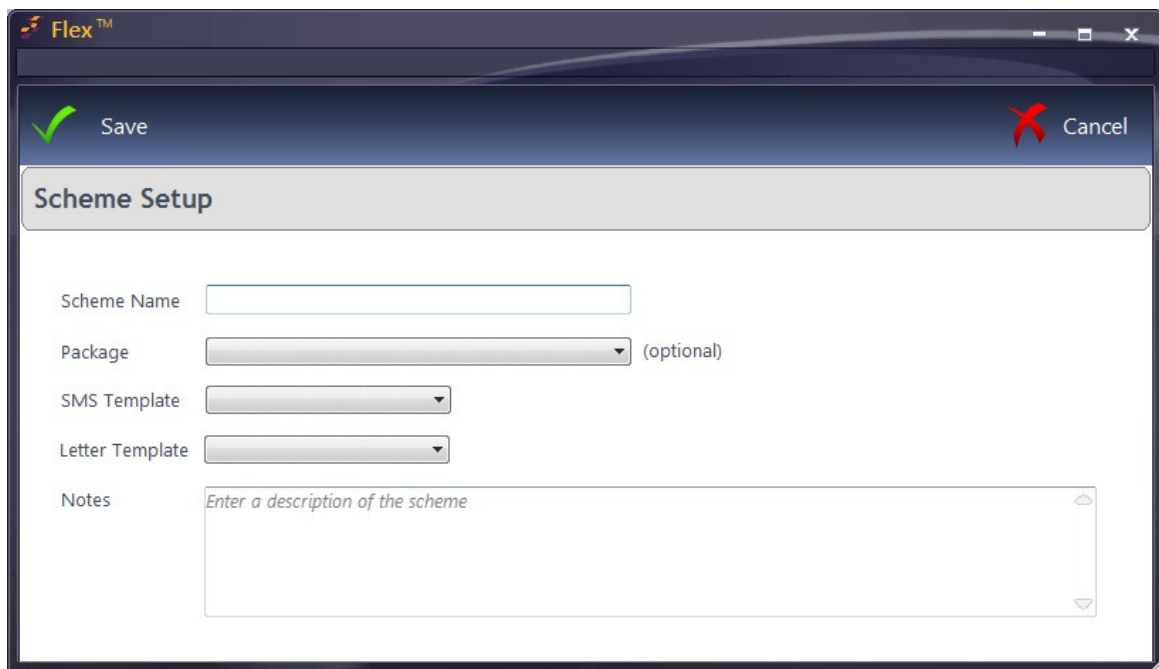
# How Do I Set Up Scheme Types?

Before patients can be assigned to a scheme, the scheme types and packages need to be set up. The initial window you find is shown below, called **Scheme Types**. This is found under **Menu - Setup - Schemes**.

Here you can list the types of Scheme offered, for example Contact Lens Recurring Orders, Eyecare Plan, Item Payment Plan.



Press **New** to create a new Scheme type, or **Update** to amend an existing one. The same window appears, just the amount of information shown (if any) will vary depending on whether you pressed New or Update.



**Scheme Name:** Give the scheme a name

**Scheme Package:** A package can be assigned to the type (this is optional)

**SMS / Letter Template:** A template can be assigned to the scheme TYPE. When a scheme is marked as collected, you have the option to schedule a letter or text message for the next collection date. This is usually used as a reminder to come and collect the next "X" months' supply of contact lenses.

**Notes:** A free-text box for any scheme description etc.

Please now continue overleaf to [How Do I Set Up Scheme Packages?](#)

# How Do I Set Up Scheme Packages?

In the table shown below should be a list of packages which can be assigned to patients. These packages can be customised on a per-patient basis when on the individual patient's scheme record.

Setup Schemes

Scheme Types | **Scheme Packages** | Banks / Export

ID	Name	Total £	Total Disp Fees	Total Prof Fees	Total VAT	# Months	Monthly £	Monthly Disp Fee	Monthly Prof Fee	Monthly VAT
1	FLEX Testing	£120.00	£0.00	£0.00	£20.00	12	£10.00	£0.00	£0.00	£1.67

Press **New** to create a new Scheme package, or **Update** to amend an existing one. The same window appears, just the amount of information shown (if any) will vary depending on whether you pressed New or Update.

Flex™

Save Cancel

**Scheme Package**

Package Detail:

Name: FLEX Testing Contact Lens Price List: Scheme

+ Contact Lenses + Stock Item - Discount

Item Description	Qty	Unit	Line Total	Notes	Disp Fees	Prof Fees	VAT
Contact Lenses	12	£10.00	£120.00	Contact Lens	£0.00	£0.00	£20.00

Package Price £

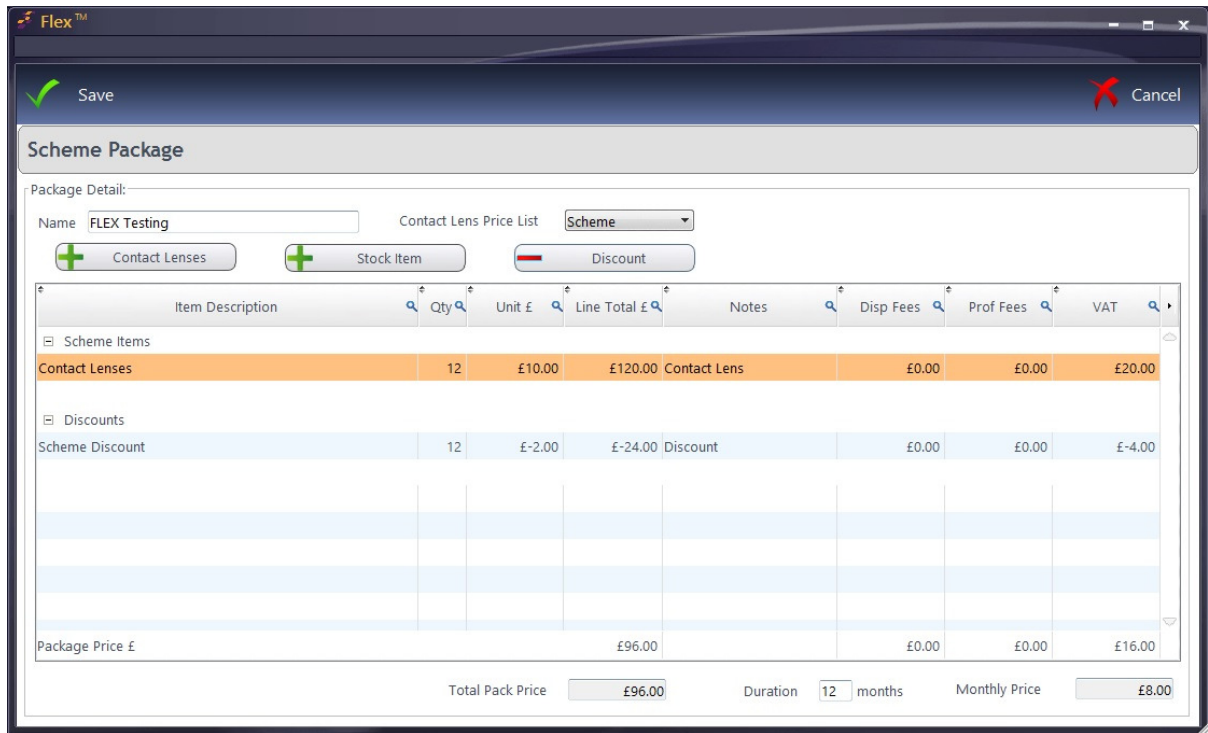
Total Pack Price: £120.00 Duration: 12 months Monthly Price: £10.00

Enter the **Name** of the Package under **Package Detail** and from the drop-down to the right of this, the **Contact Lens Price List** used will be shown (The names of the price lists can be edited under [Contact Lens](#) setup and the prices entered under Menu - Setup - [Contact Lens](#)).

The table shows the **Item Descriptions** on the package, how many are supplied (**Qty**), the total costs (**Unit** and **Line Total**) and any notes. **Disp Fees**, **Prof Fees** and **VAT** are also now shown.

To add items, use the **+ Contact Lenses** and **+ Stock Item** buttons. A **- Discount** can also be applied through here. These work in a similar way to [Till](#) discounts. See [How Do I Apply A Discount?](#) for more information. They can be entered under the [Discounts](#) page of [How Do I Modify the Till?](#)

A Scheme with a discount is shown below.



The **+ Contact Lens** button will open up the [Contact Lens Wizard](#). It will ask what the price for the item(s) should be, and how many boxes will be supplied over the period.

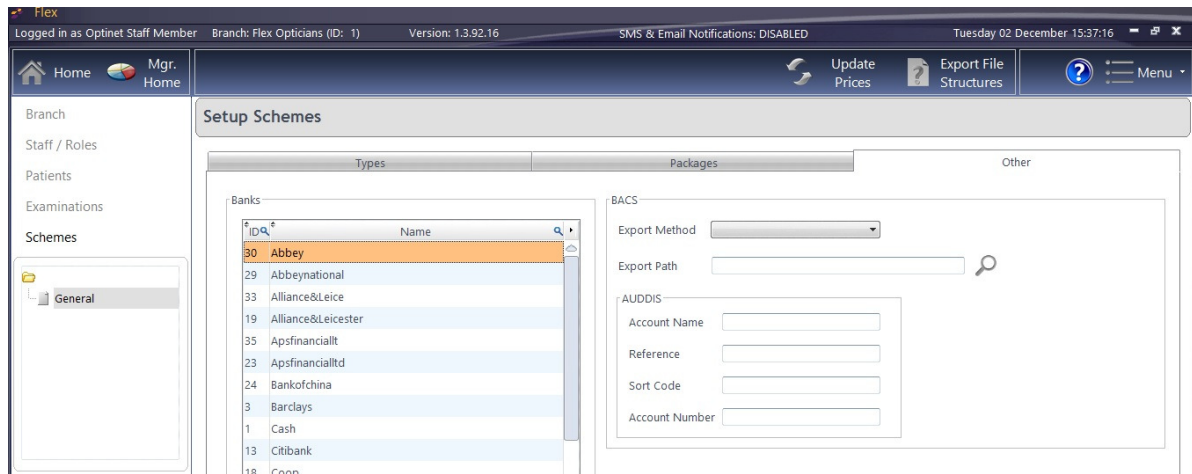
The **+ Stock Item** will open up a list of stock to pick from. It will also ask how many of these items should be supplied over the period.

The bottom of the screen will show a **Total Pack Price**, **Duration** and **Monthly Price**.

Finally in setup, please now continue overleaf to [Banks / Export](#)

# Banks / Export Settings

This page shows an overview of the other functions in the Scheme Setup.



The left hand table is simply a list of **Banks** that can be picked from.

The right hand table is for **BACS** and **AUDDIS** export settings. Please give us a call on 0845 313 0233 if you would like help with this.

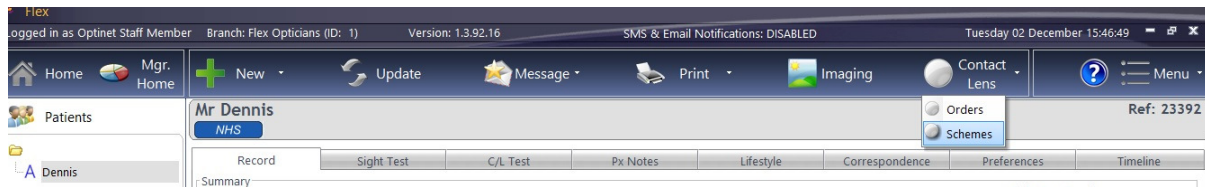
**Export File Structures:** Specifies the format data will be exported for Auddis / BACS (and potentially other areas of the system in the future).

We are now ready to assign a Patient to a Scheme in the [Patient Record](#) - see [How Do I Add a Patient to a Scheme?](#) Overleaf.

# How Do I Add a Patient to a Scheme?

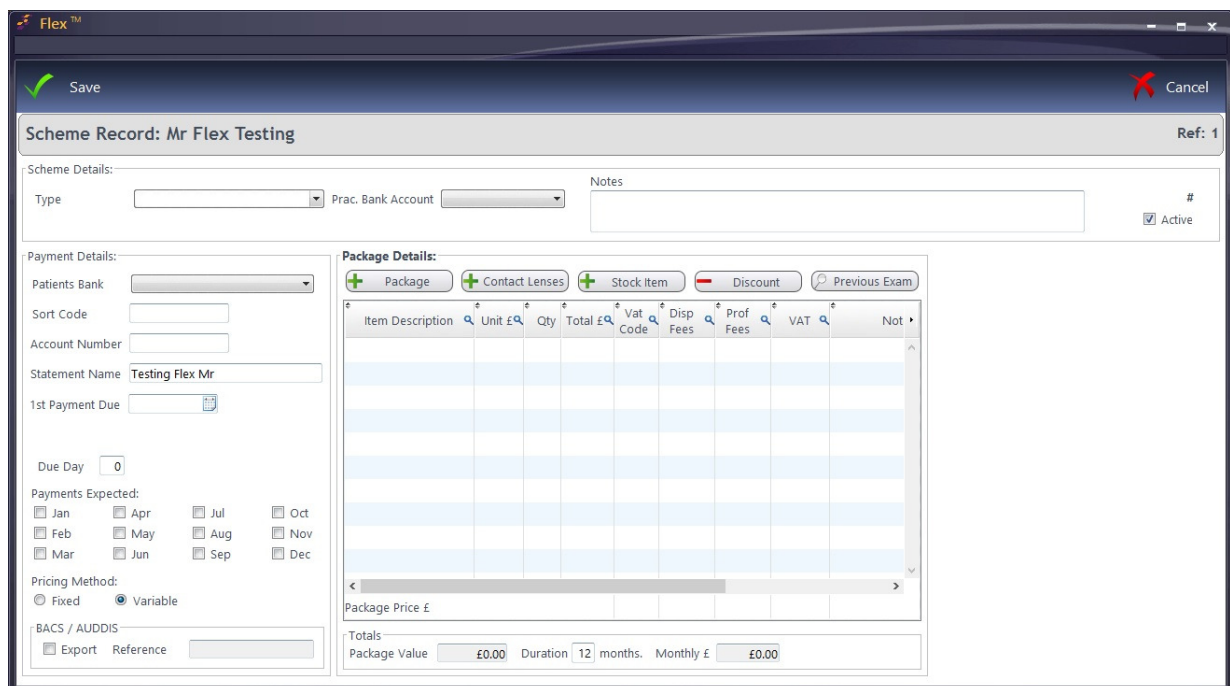
If a Patient has had their [Contact Lens Record](#) put onto the system, they can be put onto a Scheme. Note: if they wish to "pay as they go", or it is a one-off order, please see [How Do I Dispense Contact Lenses?](#)

To set up a Scheme, click to **Contact Lens - Schemes** on the Patient Record homepage (shown below).



This window will then show current schemes, collection records, items on schemes and a payment schedule. Right-click in **Patient Scheme Records** to mark an item as collected.

Click onto **New (or Update)** and a Scheme Record will pop out. This is shown below and every box is explained below the image.



## **Scheme Details:**

The **Type** of Scheme can be entered (was set up in [How Do I Set Up Schemes?](#)), whilst the **Prac. Bank Account** can also be chosen (can be set up in [Banks / Export](#)). **Notes** can also be added here, whilst the checkbox also allows the scheme to be marked or un-marked **Active**.

## **Payment Details:**

The **Patients Bank** can be chosen from the drop-down, and their **Sort Code** and **Account Number** entered, along with the **Statement Name**. The **1st Payment Date** can be entered freehand or by using the "date picker".

This will auto-populate the **Due Day** with the same day, but it can be changed.

Right-click over **Payments Expected** to choose a Monthly, Quarterly or Yearly payment schedule.

A **Fixed Pricing Method** will keep the original prices of the scheme charged if you put your prices up, choose a **Variable Pricing Method** if you wish for the prices to be updated as time progresses.

**Package Details:**

You can select one of your default **Packages** (from [Scheme Packages Setup](#)), OR create a custom scheme "on the fly" which is exclusive to that patient. You can also select a default package, then add or remove items from it, to create a custom package as well.

- **Package** - choose a default package (see [Scheme Packages Setup](#))
- **Contact Lenses** - opens up the Lens Wizard
- **Stock Item** - add a stock item to the scheme.
- **Discount** - apply a discount to one or more items on a scheme - works in the same way as the Till - see [How Do I Apply A Discount?](#)
- **Previous Exam** – Lenses and solutions can be pulled through from the patients last contact lens examination to create a custom scheme package.

Press **Save** when complete and the original window will populate with all the details filled out. This is shown below.

Patient Schemes: Mr Flex Testing Ref: 1

**PRIVATE**

Patient Scheme Records

Scheme Name	Monthly £	Active	1st Payment Date
test	£10.00	<input checked="" type="checkbox"/>	01/07/2015

Scheme Collection Records

Collected Date	Next Collection	Staff

Items on this Scheme

Item Description	Qty
Contact Lenses	12.00

Payment Schedule

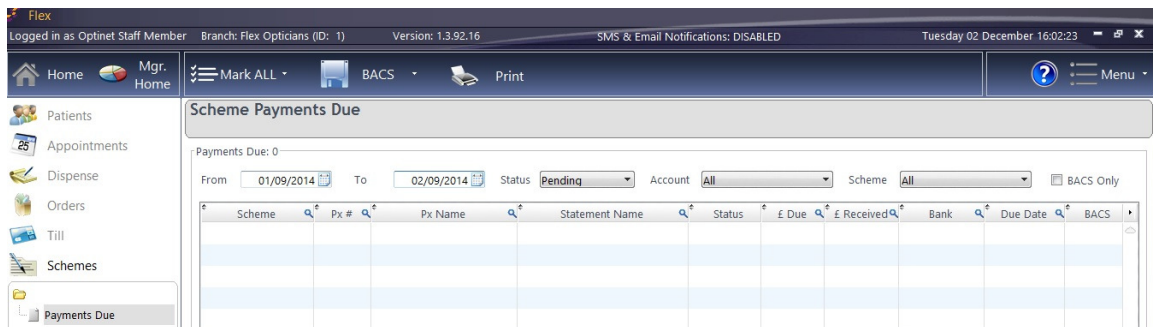
Date	£ Due	£ Received	Status
25/07/2015	£10.00	£0.00	Pending
25/08/2015	£10.00	£0.00	Pending
25/09/2015	£10.00	£0.00	Pending
25/10/2015	£10.00	£0.00	Pending
25/11/2015	£10.00	£0.00	Pending
25/12/2015	£10.00	£0.00	Pending
25/01/2016	£10.00	£0.00	Pending
25/02/2016	£10.00	£0.00	Pending
25/03/2016	£10.00	£0.00	Pending
25/04/2016	£10.00	£0.00	Pending
25/05/2016	£10.00	£0.00	Pending

Finally, please see [How Do I Run / Reconcile Schemes?](#) Overleaf.



# How Do I Run / Reconcile Schemes?

Once the Schemes have been [Setup](#) and [Patients](#) assigned, you can manage them in the Schemes module of FLEX, shown below.



This page will show all Scheme Payments Due. You can select a Date Range (**From / To**), choose a patient by **Status** or bank **Account**, and also by the type of **Scheme** they are on. Finally, there is a checkbox if you only wish to see **BACS** patients.

Along with the date range, you will commonly sort by the **Status** of the patient. The statuses are:

- All
- Received - you have marked that you have received the money on your bank statement.
- Part Paid - you have received some of the payment due. The remainder will be rolled onto next month.
- Unpaid - you have received no money and the whole amount will be rolled onto next month.
- Exempt - you marked that no payment was due this month.
- Pending - you are waiting for this transaction to process (the default status)
- Submitted - you are expecting this payment.

The **Mark ALL** button can be used to assign all customers as Pending, Submitted or Received.

The **BACS** button allows all BACS patients to be previewed and the relevant file exported. The type of file is customisable in [Other Scheme Setup](#).

**Print** will print out all the records shown on the screen.

Note: if you scroll further along this window, you will find the **Disp Fees, Prof Fees** and **VAT** amounts.

Finally, in [Business Intelligence, Payments By Group](#) has an "Include Schemes" tick box to include all payments which are marked as paid. The date range on this report will only include scheme payments based on their due date (as this is when the money was received, not based on the date the payment was marked as received in Flex).

Still not sure? Give our support team a call on **0845 313 0233**