ADVANCED PRACTICE MANAGEMENT SOFTWARE


**A guide to Updating Staff Members in FLEX from Optinet.**

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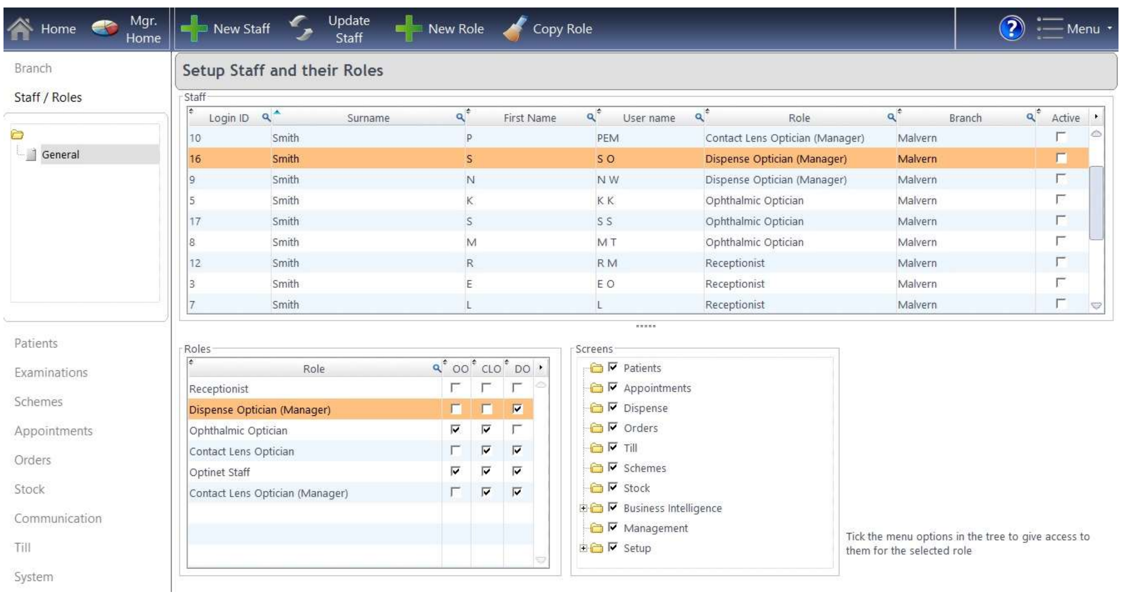
**A common task in the setup is to modify the access a staff member has, for example "I need to set John to see the Stock Screen" or "Jane is marked as an Optom but shouldn't be".**

Navigate to Menu – Setup – Staff / Roles.

All your staff members are shown on this screen. You will see their Login ID, Surname and First Name. You will also see a User name (normally initials - used where there is not space in some parts of FLEX for a full name to print). You can also see each of the Roles which your staff fit into. Along with Branch access, you will also see if a staff member is marked as Active - don't worry if there are old staff members still in this list - they are just logged due to the structure of how FLEX works.

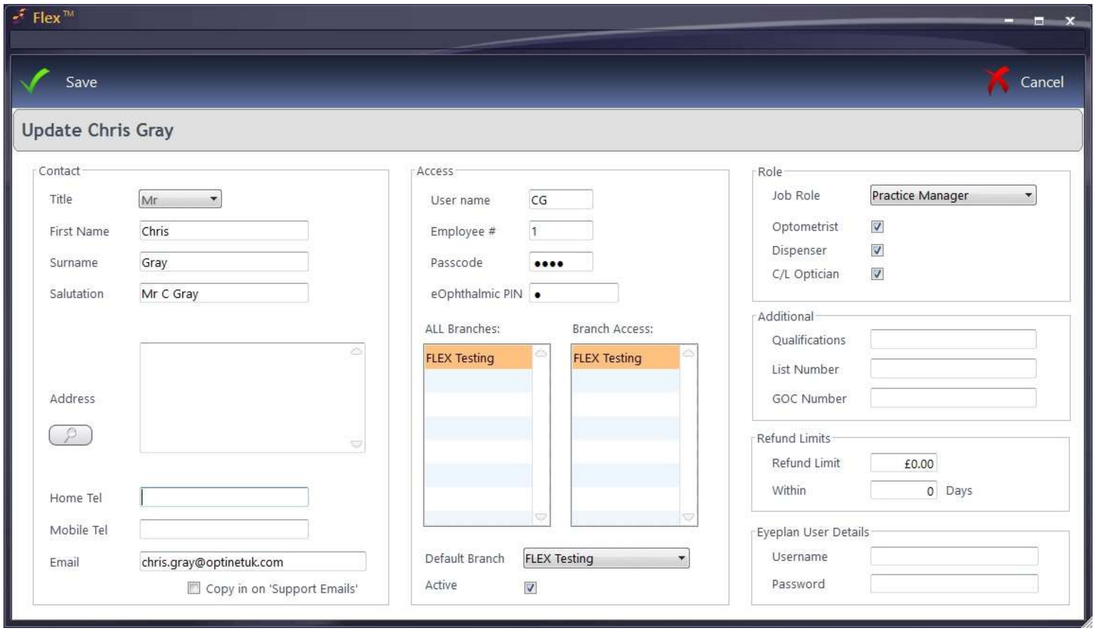
The **Screens** box, shown to the bottom right, shows which parts of the system staff have access to. Check or un-check boxes to turn these screens on and off. Note that the Business Intelligence and Setup can be expanded and further screens turned on and off.

Staff **Roles** are also shown here. Role names can also be updated here, for example changing Ophthalmic Optician to Optometrist. For more details on updating a role, read on.



## New / Update Staff Member

To add a new staff member, press + **New Staff.** This brings up the window shown below.




**Contact** details can be added, along with **Access** details such as a User Name (normally the users initials), Employee number and a Passcode.

**Passcode** rules:

- Cannot be 1234
- Cannot be the same number, e.g. 5555, 6666
- Cannot be the same as the employee number
- Cannot be the same as another staff member Passcode
- Must be between 0001 and 8999.

A green tick or red cross will appear, depending on whether or not the passcode has been accepted.

Drag and drop the relevant branch across to the **Branch Access** table.

Ensure that the **Active** checkbox is ticked.

Finally, the **Role** can be added. The default roles are populated but further roles can be added.

The Update Staff window is very similar to the New Staff window. The same rules and validation apply. Double-click on a staff member to bring up their profile. Common tasks here include choosing a new **Job Role** from the drop-down list and giving extra **Branch Access**.

## New / Update Staff Role

To create a New Staff Role, click New Role. A description can be entered, for example "Practice Manager" or "Trainee DO". There are then two screens in the window which are detailed below. To update an existing role, click on it and press **Update.**

## Security and Access

### Examinations

The most common change here is marking if a staff member is an Optometrist, Contact Lens Opticians, Dispensing Optician or a mix of the three. Tick boxes as appropriate.

**Enable Copy Previous Rx** means that previous retractions can be copied into the Sight Examination record.

**View "Due" Patients on Active List** means that patients who are due to arrive for their appointment will be shown in The Active Patient List of the user.

**Allow to Delete Sight Test** and **CL Exam** options mean that when the user right-clicks on a ST or CL, have the ability to right-click and Delete.

### Management

**Enable Manager Home Screen** means that the user can see "Mgr. Home" directly to the right of their Home screen icon (see also The Home Screen - Management Widgets)

**Change Timeline Date** means that the user can change the date recalls are being run from / to (see also Recalls and Contacting Patients)

**Allow Export of Px's Addresses** means that the user has an extra option to export data under the Data Mining tab of Business Intelligence

### Stock

**Allow to view prices** allows the user to see the cost price of stock items.

### Staff Tasks

**Allow to Task Anyone** means that when a Staff Task is raised, the user can send it to everyone

**Allow to Close Tasks** does just that!

### Till

Ticking these buttons allow various functionality per user on the Till when accessing the over-ride facility (see also Till) and also the ability to **Open Till** (see also How Do I make FLEX open the till?)

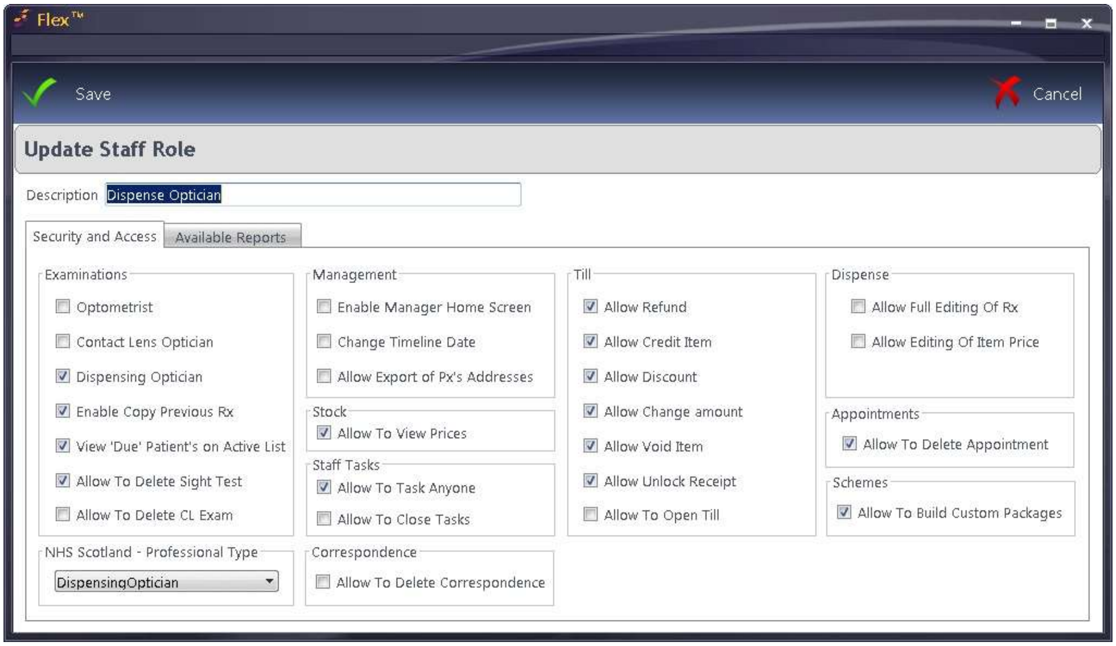
### Dispense

**Allow Full Editing of Rx** means that the Rx can be fully updated at point of Dispense

**Allow Editing of Item Price** authorises staff members in the role group to be able to change the selling price of items on a Dispense. *Audit file entries are made for any price changes that are made.*

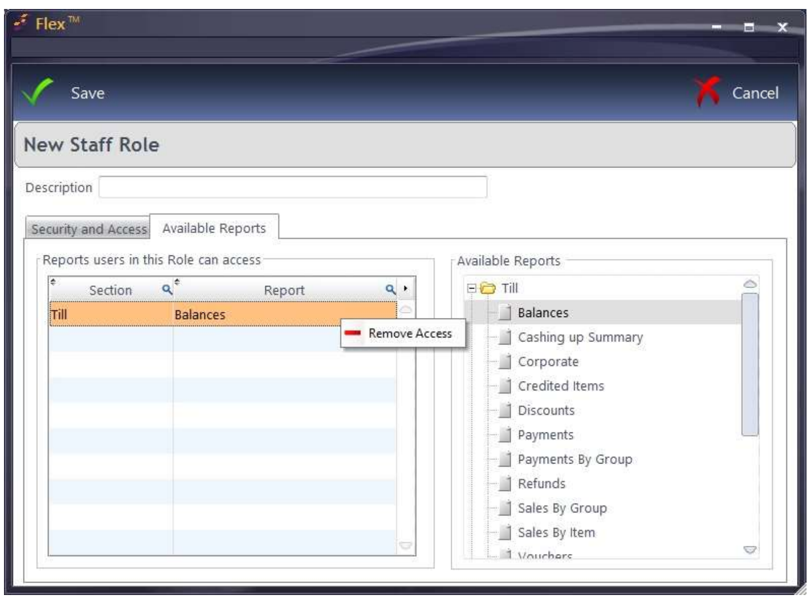
### Other Settings

Should all be fairly intuitive, please contact us for further assistance. These are shown at the top of the next page.




## Available Reports

Within this section, reports can added which are then viewed in the Business Intelligence area. Drag and drop a report from right to left to enable it to be viewed. To remove this access, right-click and **Remove Access** as shown below.



## Copy Role

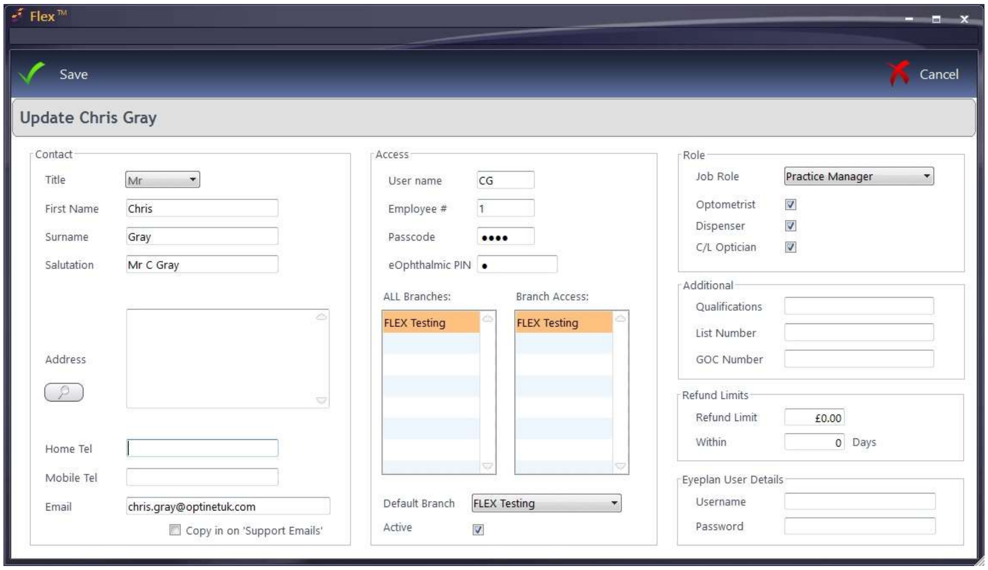
To create a similar role, press **Copy Role.** The box below will appear. Select which role should be copied and press select. After this, a box asking you to name the new role will appear. This is often used to create another Practice Manager who is / is not an Optom.


This role will then appear in the list on the first screen. It can be deleted by right-clicking and pressing **- Delete This Role.**

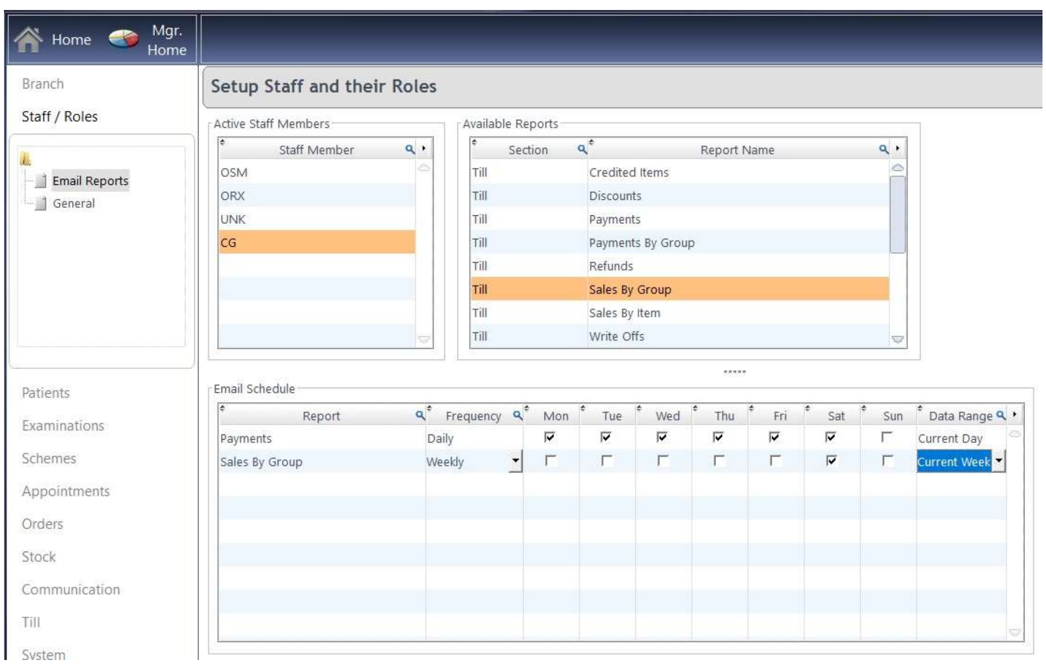
## Email Reports to Staff Members

FLEX has the ability to email staff members reports when the Till Cash Up is locked.

For this to work, you need to have email set up in FLEX (see How Do I Link In My Email Account? online) and an email address against the Staff members record (see How Do I Update a Staff Member? above). The screen to add an email address to a Staff Record is shown below (found under Menu - Setup - Staff / Roles)




Under Menu - Setup / Staff / Roles, choose the **Email Reports** tab. The window below is shown.




Choose the **Active Staff Member** by clicking on their initials. The reports can be dragged down from the **Available Reports** to the **Email Schedule** table. Choose the **Frequency** from the drop-down and tick the relevant days. Finally, choose the **Data Range** which the emailed report will show.