



Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Appointments
User Guide

Contents

Introduction to the Diary in FLEX.....	2
Viewing other days/Weeks	3
Booking an Appointment.....	4
Modifying an Appointment	7
Cancellation	7
Delete Appointment	8
Mark Slot as Non-Bookable.....	8
Mark Slot as Bookable	9
To Change Staff	9
Split and Merge Slots.....	10
Moving Appointments.....	11
Add Slots to Beginning and/or End of Day	12
View Patient Record.....	12
Printing Appointments.....	12
Find Free Slot	13

Introduction to the Diary in FLEX

The Diary (Appointments) option can be found on the left-hand side of FLEX.

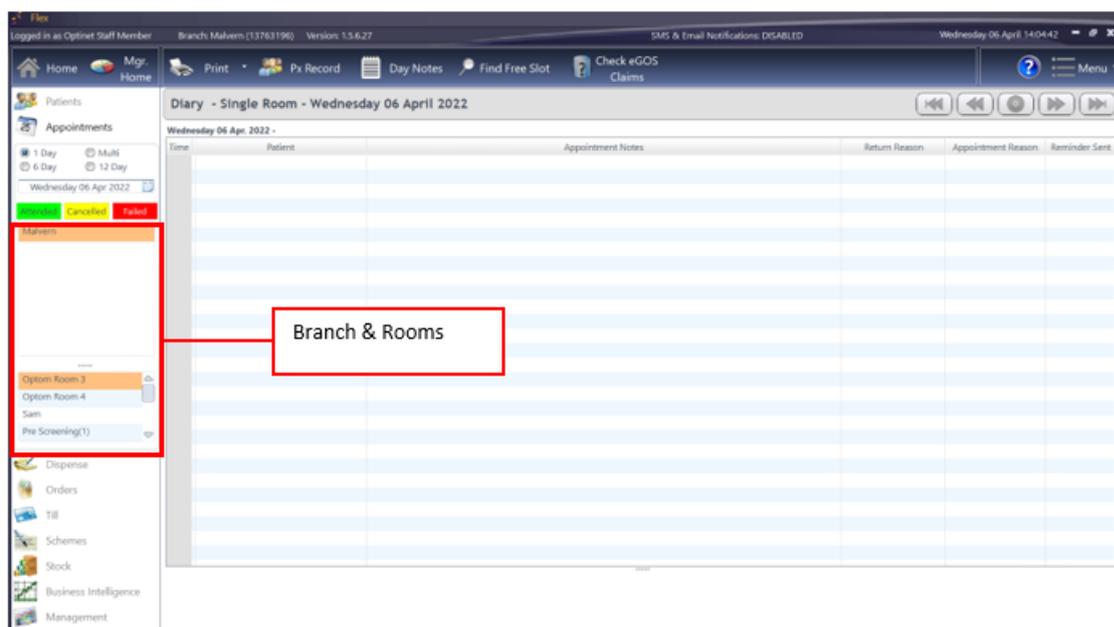
On the initial screen of flex, on the left, there is the option of selecting the type of view that you would like.

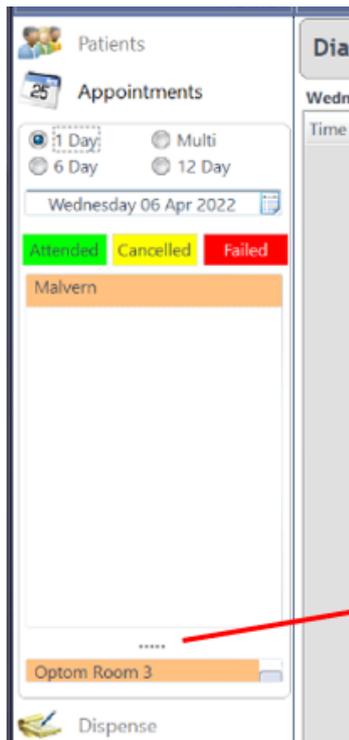
This is:

- **1 Day,**
- **6 Day,**
- **12 Day,**
- and if you have more than one consulting room there is **Multi**. Multi will show each room on one screen but will only be a single day view due to there being more than one consulting room being viewed.

Patients can be marked as **Attended**, **Cancelled**, or **Failed**.

Below this, your branch(es) will be listed and also the rooms within each branch. These will be highlighted in an orange colour as per screen shot below.





There are also five dots (.....) between the branch name and room names. This can be moved to view more rooms or to minimise view.

Click and drag this line up or down to hide and view rooms

The Branches, Rooms and Staff members can be customised in the setup menu, together with the appointment lengths, times and days.

Viewing other days/Weeks

On the top right of the appointments window, there are five buttons



- 1) Skip back a week
- 2) Skip back one day
- 3) View today
- 4) Skip forward one day
- 5) Skip forward one week.

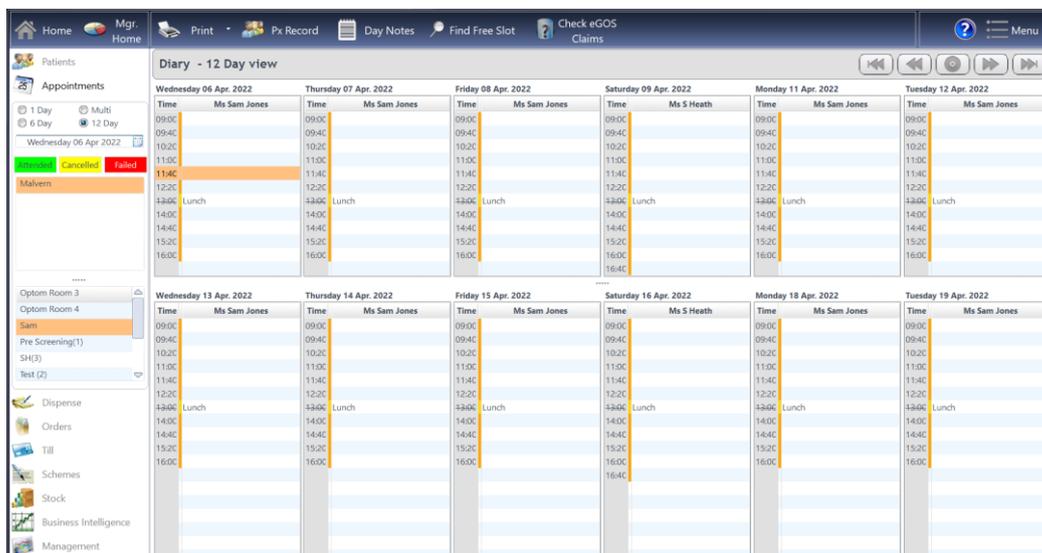
- o Alternatively, you can select a date from the calendar on the right-hand side of the window. The "Calendar" allows you to view any date using the < and > buttons. NB: Sundays and Bank Holidays are shown in Green

April 2022						
M	T	W	T	F	S	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8
Today						

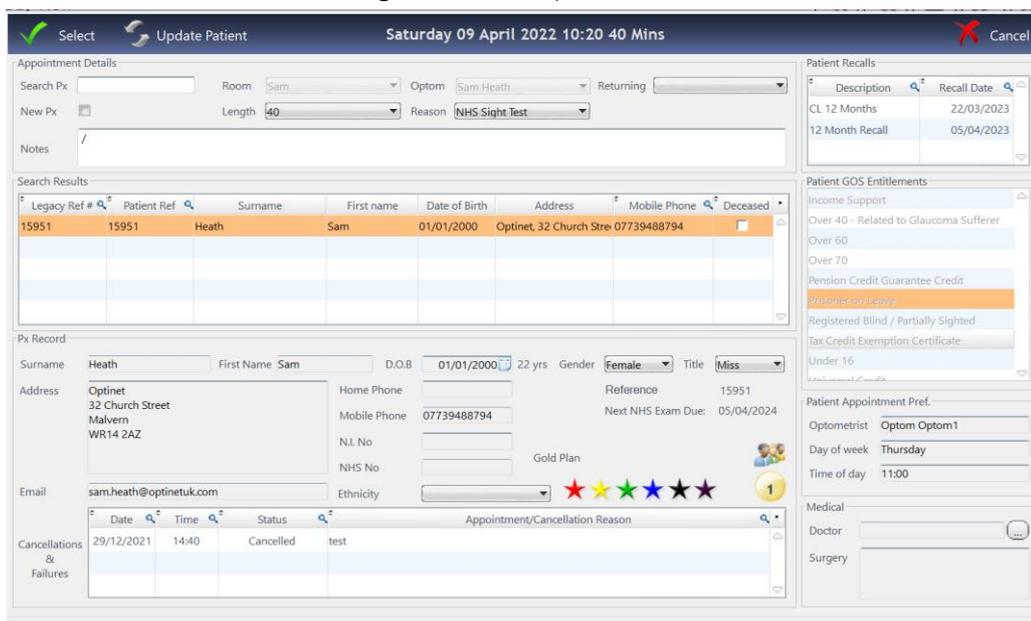
Booking an Appointment

From the appointment screen below:

- Click on the “Room” you want to book the appointment into.
- Click on the date and time of the room you want to book.



- When the booking screen opens, as below:
 - Select patient.
 - The last patient you were looking at on flex will be the patient that appears as default on this screen.
 - To select another patient, click on **Search Px** on the top left of the screen. (Search criteria apply*)
 - The patient selection will be in the **Search Results**
 - Remember to click on the name you want, this will ensure the correct person is booked in. Also, their personal details will be visible at the bottom of the booking screen for you to confirm with them.

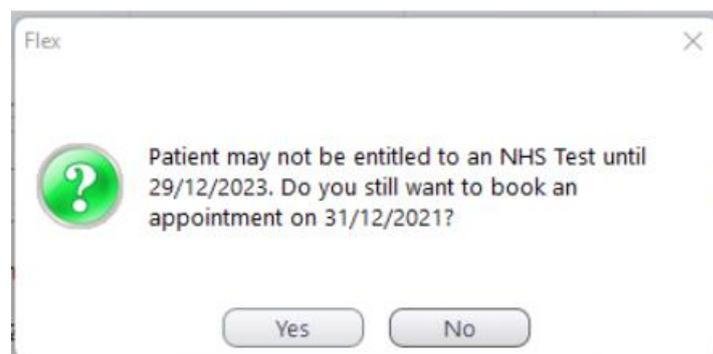


- When you have the correct patient who want to book in, select the appointment **Reason**, which in turn will show the relevant time needed for this appointment. (This is setup in the setup menu).
- This time, however, can be changed in the booking screen by clicking the **Length** field.
- Click **Select** in the top left of the window.

Note

- * (Search criteria)
 - The patient reference number
 - The patient surname (or the first name, by putting a comma first, e.g. ",sam")
 - The first three letters of the Patient surname and first name. For example, for Sam Heath, search **Hea,sam** or **Heath,Sam**
 - The patients home or mobile telephone number or
 - The patients address or postcode.

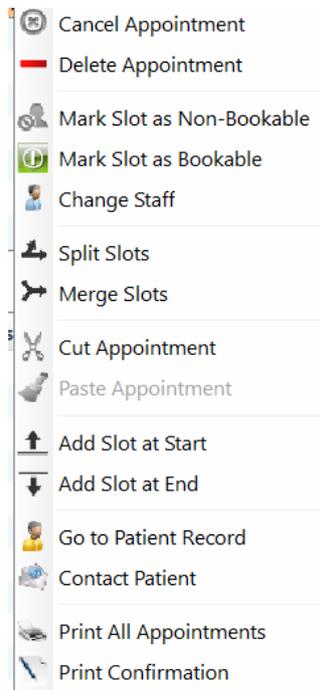
- The patient details will be shown in the bottom third of the window. If the patient is new, check the box **New Px**. The bottom third of the screen then becomes editable.
- **Update Patient** in the top of the window to open up these fields.
- The Patient **GOS entitlements** are also shown on the screen, in the right-hand quarter of the screen. Age related entitlements (Under 16, Over 60, Over 70) are populated automatically.
- Click to select multiple entitlements.
- Doctor and Surgery are shown below GOS Entitlements and can be updated using the button with three dots inside.
- Patient recalls (i.e. are they due?) are shown in the top-right corner and appointment history (e.g. are they a serial canceller?) are shown at the bottom of the screen.
- Stars are also shown, along with all the details other details i.e. A patient is trying to book an NHS test, but they are not yet due, FLEX will warn you.



Modifying an Appointment

To amend an appointment:

- Single Left Click on the patient (Highlight Orange)
- Single Right click on the appointment



Cancellation

- When a patient contacts your practice to cancel their appointment this is the option which should be selected.
- A pop up window will require a reason for cancellation.
- This will make a note on the patient record of the date time and reason for cancellation.
 - This cancellation will be visible in the **Consent/App Hist** on the patient record.

Miss Sam Heath
NHS Gold Plan
Ref: 15951
DOB: 01/01/2000 (22)

Record PreExam Sight Exam Contact Lenses Px Notes Lifestyle Correspondence Consent / App. Hist Timeline

Px has agreed to receive:

Recalls & Notifications by...
LETTER
EMAIL
SMS
TELEPHONE

Marketing Messages by...
LETTER
EMAIL

Appointments

Date	Time	Reason	Staff	Branch	Notes
09/04/2022	11:40	NHS Sight Test	Ms Optom	Malvern	/
29/03/2022	16:00	NHS Sight Test	optom	Malvern	/
17/03/2022	11:40	NHS Sight Test	optom	Malvern	A /
17/03/2022	11:40	NHS Sight Test	Ms Optom	Malvern	A /
16/03/2022	14:00	NHS Sight Test	Ms Optom	Malvern	/

Cancellations

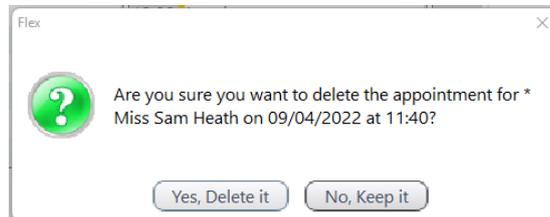
App Date	Time	Reason	Branch	Canc Date	Canc Time	Canc By	Notes
29	14:40	test	Malvern	29/12/20	15:14	Optinet Staff 1	/

Profile

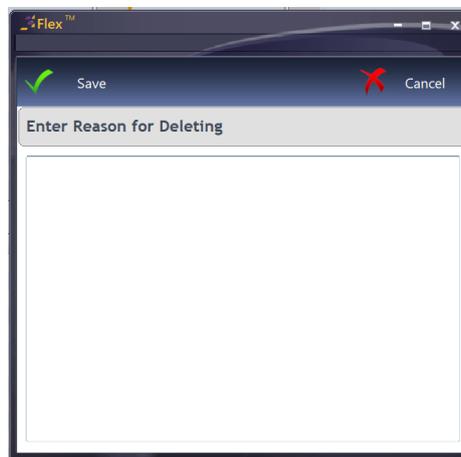
Optometrist: Optom Optom1
Day of week: Thursday
Time of day: 11:00

Delete Appointment

- This option is used if in-house errors
- Flex will want you to confirm you want to delete the appointment



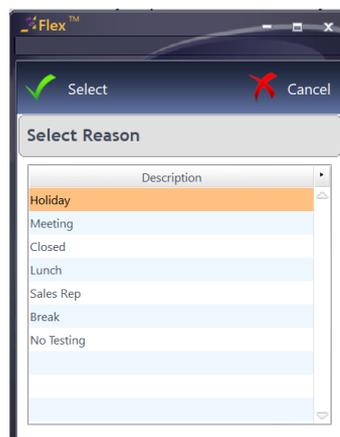
- A reason will be required but does not record this deletion on the patients record.



- Clicking **Save** will immediately take the appointment out of the diary. The slot will now be available to be re booked.

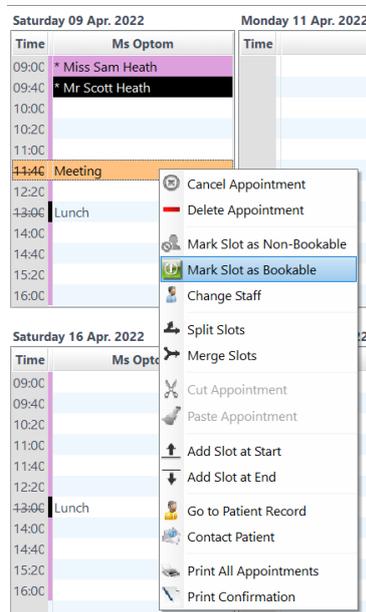
Mark Slot as Non-Bookable

- A slot can be marked as **Non-Bookable** if required, for example for Staff Training, a Fire Drill etc. Right-click, choose "Mark Slot as non-Bookable" and select a reason from the box which appears. Reasons shown can be modified in the setup



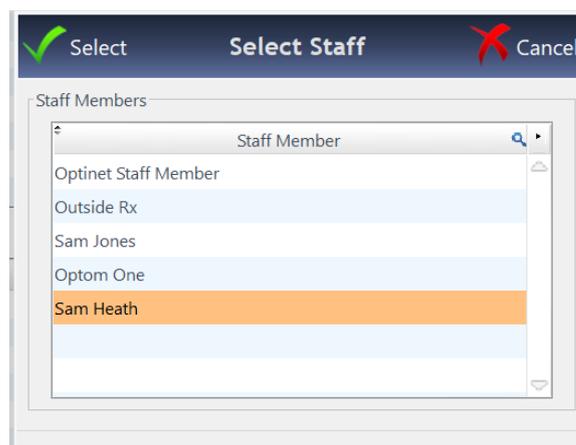
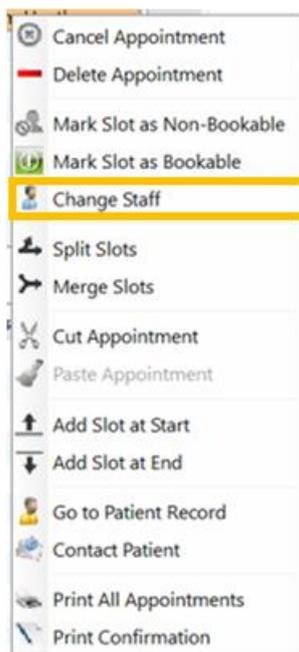
Mark Slot as Bookable

- A slot can be made Bookable again by Right clicking the time slot.



To Change Staff

- If you need to change an appointment to another staff member, Right click and select **Change Staff**



Split and Merge Slots

- With **Split Slots**, an (e.g.) 30 minute appointment can be made into a 20 then 10, 15 then 15 etc. Default is 50% - 50%. A box will show the original slot and using the boxes / arrows you can choose the split of the resulting slots. You can now split into several slots, or a number of minutes.

The screenshot shows the 'Split Slot' dialog box. The 'Original Slot' is from 11:00 to 11:40 with a length of 40 minutes. The 'Split into' section shows '# of Slots' set to 2 and 'Slots of' set to 20 mins. The 'Resulting Slots' section shows two slots: one from 11:00 to 11:20 with a length of 20 minutes, and another from 11:20 to 11:40 with a length of 20 minutes. A callout box labeled '50% Split' points to the resulting slots.

50% Split

The screenshot shows the 'Split Slot' dialog box. The 'Original Slot' is from 11:00 to 11:40 with a length of 40 minutes. The 'Split into' section shows '# of Slots' set to 2 and 'Slots of' set to 20 mins. The 'Resulting Slots' section shows two slots: one from 11:00 to 11:30 with a length of 30 minutes, and another from 11:30 to 11:40 with a length of 10 minutes. A callout box labeled 'Split into a 30 minute & another into 10 Minutes' points to the resulting slots.

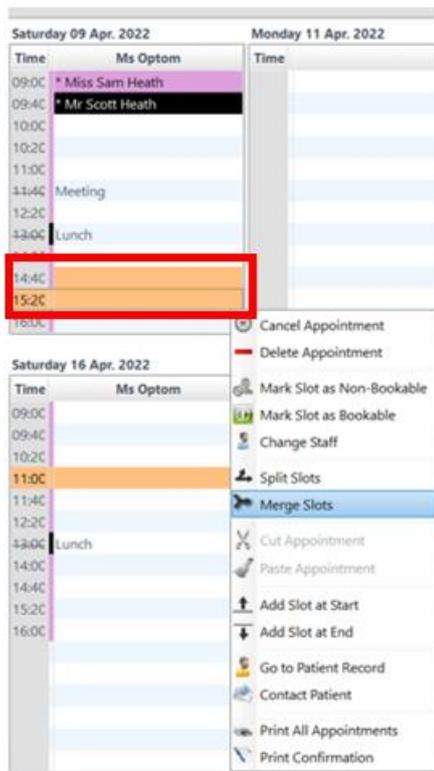
Split into a
30 minute &
another into
10 Minutes

- Alternatively, the slot can be split into more than 2 slots

The screenshot shows the 'Split Slot' dialog box. The 'Original Slot' is from 11:00 to 11:40 with a length of 40 minutes. The 'Split into' section shows '# of Slots' set to 4 and 'Slots of' set to 10 mins. The 'Resulting Slots' section shows four slots: one from 11:00 to 11:10 with a length of 10 minutes, one from 11:10 to 11:20 with a length of 10 minutes, one from 11:20 to 11:30 with a length of 10 minutes, and one from 11:30 to 11:40 with a length of 10 minutes.

- These slots can be amended as before if required.

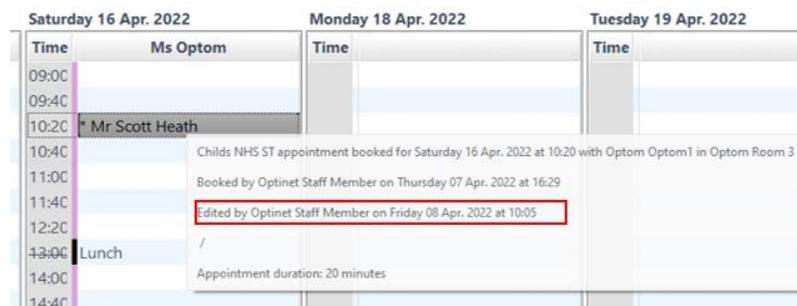
- o With **Merge Slots**, individual slots can be made into one larger appointment. Hold down the **Ctrl** key and single left click the slots to merge, release **Ctrl** then right click and choose Merge Slots. It will ask you if you are sure you want to Merge? Choose.



Moving Appointments

- o If you need move an appointment, the **Cut & Paste Appointment** functions can be used.
- o Right-click Select **Cut** Appointment
- o Find the new desired appointment time, Right-click and select **Paste Appointment**.

This action may take a second or two to complete. When cutting and pasting an appointment, the staff details of the person who carried out the action are stored and displayed on the appointment tooltip.



An entry is also made in the System Audit File

Add Slots to Beginning and/or End of Day

- **Add Slot at Start** creates a new, default length appointment at the start of the day (First Appointment).
- **Add Slot at End** creates a new, default length appointment at the end of the day (Last Appointment).

Note

To do this click within the day's appointments, if a right click is attempted on part of the diary without a time against it the right click menu will **NOT** appear.

View Patient Record

- This can be done one of two ways:
 - Right click on the appointment slot containing the patient you want to view.
 - Select **Go to Patient Record**

Or

- Highlight the patient in the diary by single left clicking
- Click on **PX Record** at the top of the diary screen in the blue bar.

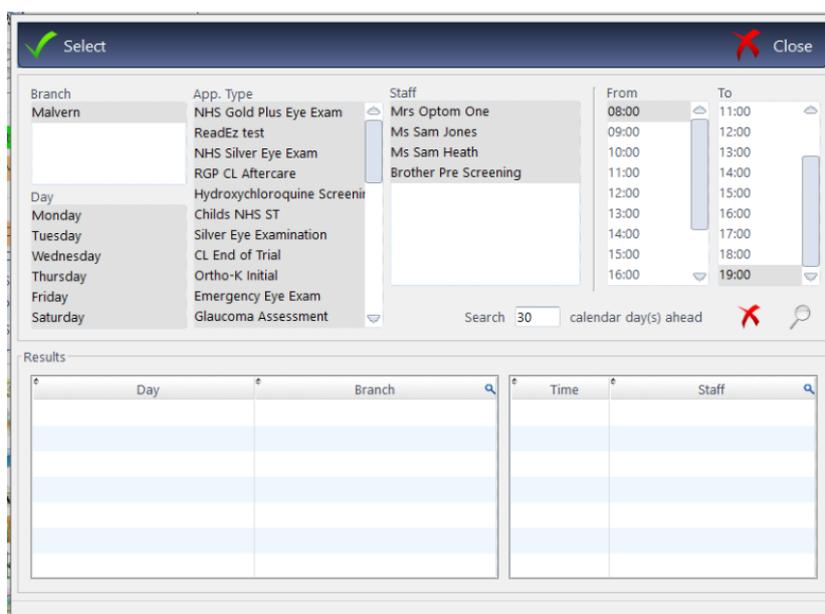
Printing Appointments

- On the day you want to print
- Right click and select **Print All Appointments**

If you require an appointments list for a few days, this can also be done in Business Intelligence > Appointments

Find Free Slot

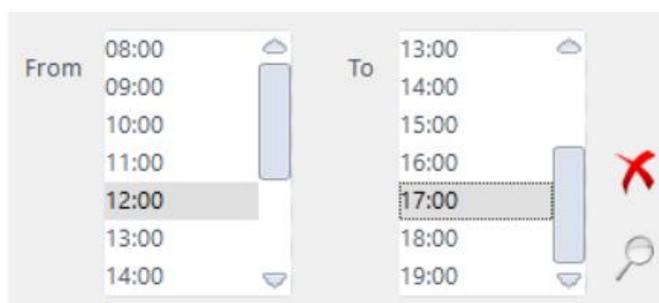
When booking an appointment, you can find a free slot in the diary by clicking 'Find Free Slot'. The screen below is shown.



The window above will allow you to search for any free slots that are available. Use the tables to select the Branch, Day(s) and Staff. Due to how most appointment types are set up, we suggest leaving ALL App. Type selected.

Then, select the appropriate time ranges in the boxes to the right.

For example, if the patient would like to be seen any time after midday, select 12.00 in the left-hand box and the final slot time in the right-hand box (see below).



Then, click the magnifying glass icon at the far right of this window to search for free slots. You can choose how many calendar day(s) ahead you wish you search, or press the X to clear your selection.

Results

If there are free slots available for the criteria you have chosen, the results will show up in the box at the bottom left.

- Click the day the patient would like and then, the next window will be populated with the time slots available.

If one of the time slots is suitable, highlight it by left clicking and then click 'Select' in the top left corner to book the slot. You will then be presented with the appointment booking window.

The screenshot shows a 'Select' window with the following filters:

- Branch: Malvern
- App. Type: Childs NHS ST, CL Fitting, NHS Sight Test
- Staff: Ms Sam Jones, Mrs Optom One, Ms Sam Heath
- Day: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

Search: 30 calendar day(s) ahead

Results:

Day	Branch
Saturday 09 April 2022	Malvern
Saturday 16 April 2022	Malvern
Saturday 23 April 2022	Malvern
Saturday 30 April 2022	Malvern
Monday 02 May 2022	Malvern
Tuesday 03 May 2022	Malvern
Wednesday 04 May 2022	Malvern

Time	Staff
09:00	optom
09:40	optom
10:20	optom
11:00	optom
11:40	optom
12:20	optom
14:00	optom