



Get the most out of



User Guide Diary Build

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Diary Build

To build the appointments within FLEX, there are a number of steps which have to be completed.

Accessed from the **Setup** menu > Appointments.

The first part of a "Wizard" which helps customise the Diary step by step. However, it is worth noting that barring the "**Staff Planner**" tab on the top-bar (which takes you straight to step 5 of 5), all the other top menu bar buttons work independently to the wizard.

Step One – Days and Times

The screenshot shows the 'Setup Diary' wizard interface. The title bar indicates 'Setup Diary' and 'Step 1/5: Select a branch and enter opening hours'. A 'Next' button with a blue arrow is located in the top right corner. The main content area is divided into two panels:

- Branch:** A table with a search icon and a dropdown arrow. The table has a header row with 'Description' and a row with 'Malvern' selected.
- Opening Hours:** A table with a search icon and a dropdown arrow. The table has a header row with 'Day', 'Open Time', and 'Close Time'. The rows are: Monday (09:00, 17:00), Tuesday (09:00, 17:00), Wednesday (09:00, 17:00), Thursday (09:00, 17:00), Friday (09:00, 17:00), and Saturday (09:00, 17:00).

Below the panels, a note states: 'The Diary setup uses a wizard process to help you create your appointment slots step by step'.

The **Branch** description, can be updated and the **Opening Hours** / Days changed.

- Double click within the text (for example *Monday* or *17:00*) to update the values. If you try and build appointment slots outside of your opening hours / days, it will warn you when building the diary.

Step Two – Consultancy Rooms

Setup Diary Step 2/5: Enter the names of your consultation rooms

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Consultation Rooms

Room Name	Display Order	Active	Dashboard Active
Notes(5)	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pre Screening(1)	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SH(3)	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test (2)	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Optom Room 1 (0)	7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Notes(4)	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Optom(6)	9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ME(7)	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Optom Room 3	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Optom Room 4	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Add your consultation rooms here

The **Consultation Rooms** can be added to and updated in the second screen, for example some practices prefer to use Optom names, not Room names.

- Double click within the text (for example *Oak Suite*) to update the values.
- Double-click in the blank space below current rooms to add a new room.

or

- un-check **Active** to remove from the Appointments screen. The **Order** of these rooms can also be set

Step Three – Appointment Reasons, Times and Colours

The screenshot shows the 'Setup Diary' interface. The main area contains a table titled 'Appointment Reasons' with the following columns: Reason Description, Length, Background Colour, Foreground Colour, Suppress ST, Suppress CL, NHS warning, Prepare GOS, Non Bookable, Display Order, and Inactive. The 'ReadEz test' row is highlighted in orange, showing a length of 30, a magenta background, and a black foreground. A pink banner at the bottom of the table reads: 'This is a sample of the colour combination you have selected'.

Reason Description	Length	Background Colour	Foreground Colour	Suppress ST	Suppress CL	NHS warning	Prepare GOS	Non Bookable	Display Order	Inactive
NHS Gold Plus Ey	40	White	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
ReadEz test	30	Magenta	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
NHS Silver Eye Ex	30	White	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
RGP CL Aftercare	30	Thistle	Black	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Hydroxychloroqu	60	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Childs NHS ST	20	White	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Silver Eye Examin	30	Lime	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
CL End of Trial	20	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Ortho-K Initial	50	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Emergency Eye Ex	30	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		0	<input type="checkbox"/>
Glaucoma Assess	60	White	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	<input type="checkbox"/>
Break	15	Gold	Black	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Break	0	<input type="checkbox"/>
Gold Eye Examine	40	White	Black	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		0	<input type="checkbox"/>

- To add/amend Reason Descriptions – Double click in a blank space at the bottom of the list. Alternatively, double click on any of the existing descriptions to amended.
- To add/amend Length of appointment – Double click in the blank space or on the number as above.
- Background and Foreground colours can be selected against each appointment type.
- The check-boxes for **Supress ST** and **Supress CL** will stop a Sight Test or Contact Lens reminder being sent out when an appointment is booked. (For example: if Mrs Jones has a sight test reminder due to be dispatched in three weeks' time but she has come in to book an appointment, the correspondence will be cancelled).
- **NHS Warning** being ticked means that when an appointment is booked before an NHS Patient is due back, it will warn the user. This setting can be customised under **SETUP menu > Branch**.
- **Prepare GOS** being ticked means that when NHS forms are to be printed in a batch through the diary, appointments booked under this reason will be shown.
- **Display Order** for the order which the appointment reasons appear in the diary. *Note* that these will be sorted in ascending order, so don't need to be perfectly numerical.
- If you want a slot to appear as **non-bookable** (e.g. Lunch), choose this from the drop-down.
- If it is an appointment reason you no longer use, tick **Inactive**.

Step Five – Room Planner

Setup Diary Step 5/5: Select Branch, Room and Group and Date. Drag the times onto the Room Planner to create your diary

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Consulting Room

Branch: **Malvern**

Room: **SH(3)**

Select Group

Group: **Mon to Sat - Sami**

Defined Working Hours

Staff	Description	Start
ZuHal	NHS Sight Test	09:00
ZuHal	Lunch	13:00
ZuHal	NHS Sight Test	14:00

Date: December 2021

M	T	W	T	F	S	S
29	30	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	31	1	2
3	4	5	6	7	8	9

Today

Staff / Room Planner

Week 51

	Monday 20 (D)	Tuesday 21	Wednesday 22	Thursday 23	Friday 24	Saturday 25	Sunday 26
7:00							
8:00							
9:00	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal		
10:00							
11:00							
12:00							
13:00	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal		
14:00	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal	SH(3) ZuHal		
15:00							
16:00							

- In the final screen of the wizard, all the information previously entered is combined into the **Room Planner** to create your diary.
- The **Branch** and **Room** can be chosen.
- The **Group** selected
- Then **Defined Working Hours** dragged into the **Staff / Room** planner.
- To activate the diary – Click on the diary view on the right of the screen first.
- Then select dates to be filled out by using the Calendar (**Date**) box.
 - Press the **Shift** key to select multiple dates, but be aware this may include days you are not open (e.g. Sundays). You can hold down the **Ctrl** key to pick individual dates, or to exclude days (e.g. Sundays).
- The diary can automatically built ahead each week. In the **Setup Menu** under **Branch** setup > **Data** > Dispense Agreement section (Bottom Right of the window).
 - The number of weeks to be auto-generated is set (default is 12). The dates to populate with appointments have to be selected in the calendar.

Any Further assistance needed, please contact HelpDesk.

Buttons on the Blue Bar



Staff Planner – explained on Page 7

Appt Reminders – Contact us for help setting up SMS and/or email Appointment Reminders and/or Confirmations

- Once setup with SMS and or Emails
- Select reason for the reminder from the drop down
- Select SMS Template/Email Template (These are setup in **Setup > Communication**)

Return Reasons

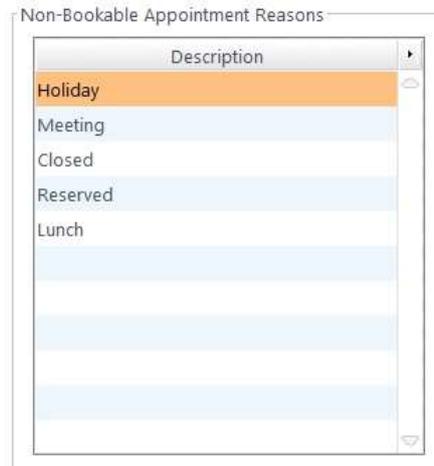
This is a customisable list of Appointment Return Reasons. To change them, double-click on the reason. Double-click in the first available row to add a new reason. These will also be shown graphically in the Management Widgets of the Manager Home Screen.

The screenshot shows a window titled 'Appointment Return Reasons' containing a table with the following data:

Return Reason	Inactive
Letter	<input type="checkbox"/>
SMS	<input type="checkbox"/>
Email	<input type="checkbox"/>
Walk in	<input type="checkbox"/>
Recommendation	<input type="checkbox"/>
Hospital	<input type="checkbox"/>
GP Referral	<input type="checkbox"/>
Emergency	<input type="checkbox"/>
Special Offer	<input type="checkbox"/>
Phone Call	<input type="checkbox"/>

Non-Bookable Reasons

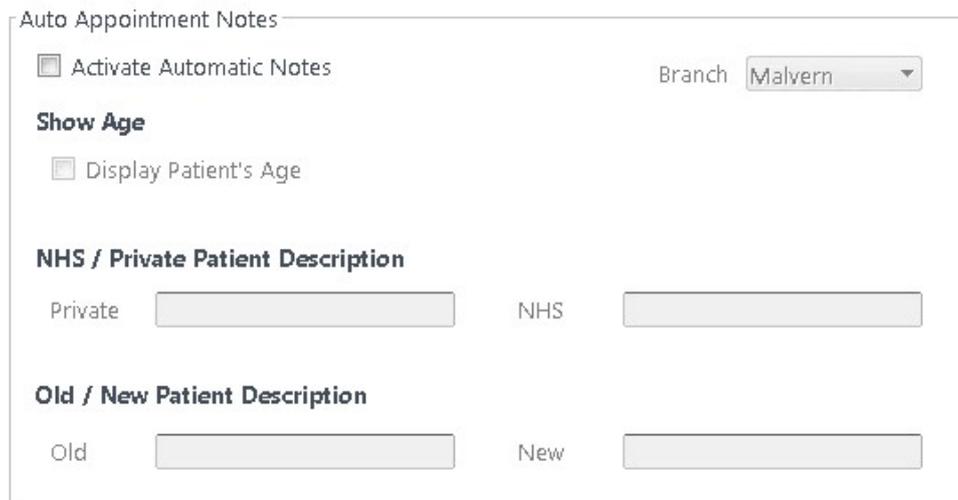
This is a customisable list of Non-Bookable Reasons. To change them, double-click on the reason. Double-click in the first available column to add a new reason.



Auto Appt Notes

Auto Appointment Notes allow notes to be automatically added when an appointment is created.

- Check the box **Activate Automatic Notes**
- Select **Branches**.
- Part of this setting is also the ability to **Show Age**.
- **NHS / Private Patient Description** and **Old / New Patient Description**, set what you would like to appear, for example for an Old NHS Patient, "OP / NHS" would appear.
-



Auto Appointment Notes

Activate Automatic Notes Branch

Show Age

Display Patient's Age

NHS / Private Patient Description

Private NHS

Old / New Patient Description

Old New

Staff Restrictions

The 'Staff Restrictions' function allows rules to be put in place about which appointment types can be performed by each staff member. Two levels can be set, 'Warned' or 'Not Allowed'. This is shown and explained below:

The screenshot shows a software interface titled "Setup Diary" with the subtitle "Review which of your staff members can be assigned to specific appointment types". It is divided into two main sections:

- Appointment Reasons:** A list of appointment types, with "NHS Gold Plus Eye Exam" selected. Other items include ReadEz test, NHS Silver Eye Exam, RGP CL Aftercare, Hydroxychloroquine Screening, Childs NHS ST, Silver Eye Examination, CL End of Trial, Ortho-K Initial, Emergency Eye Exam, Glaucoma Assessment, Break, Gold Eye Examination, and BV Assessment.
- Restricted Staff:** A table with columns for "Staff", "Warned", and "Not Allowed". The first row shows "Optinet Staff Member" with a dropdown arrow, a checked box in the "Warned" column, and an unchecked box in the "Not Allowed" column. The second row shows "Ms Sam Jones" with a checked box in the "Warned" column and an unchecked box in the "Not Allowed" column. There are several empty rows below.

Appointment Reasons

- These are shown on the left of the window.
- In the right hand table, **Restricted Staff**, for each appointment reason, you can select a **Staff Member** and choose whether or not the staff member is allowed to conduct this appointment, by ticking **Warned** or **Allowed**.