



Get the most out of

# FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

## User Guide for the Basics

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## Logging In

Staff ID and PIN will be allocated to all users.

At login screen (as shown below), enter staff ID. This will be required each time you open the application. Once logged in unless the application is closed, the system will only require you to enter you PIN from the lock screen.



Enter the details you have been given, choose your branch (even if you only have one) and then click the “Login” button which appears when the details have been filled out OR press the enter key twice.

If FLEX is already open, you will see the Lock screen. From here, simply click into the PIN box and enter your PIN code; the last correct digit lets you in (no need to press Enter).



When you are not using the software, press the **F6** button on your keyboard to lock the screen. This will enable another user to put in their PIN to log in and continue to use FLEX.

## The Home Screen

Once you're logged in, you will see the Home screen. The screen is divided into 4 "Widgets" which you can change depending on your preferences, or your role within the practice. These can be changed or rearranged at any time. You can do this by pressing the "Change Widgets" button.

To get back to this screen at anytime when using FLEX, simply click on the



Button which is always in the top left of the screen.

## Home Screen Widgets

### Patient Search

Click in the search box to begin

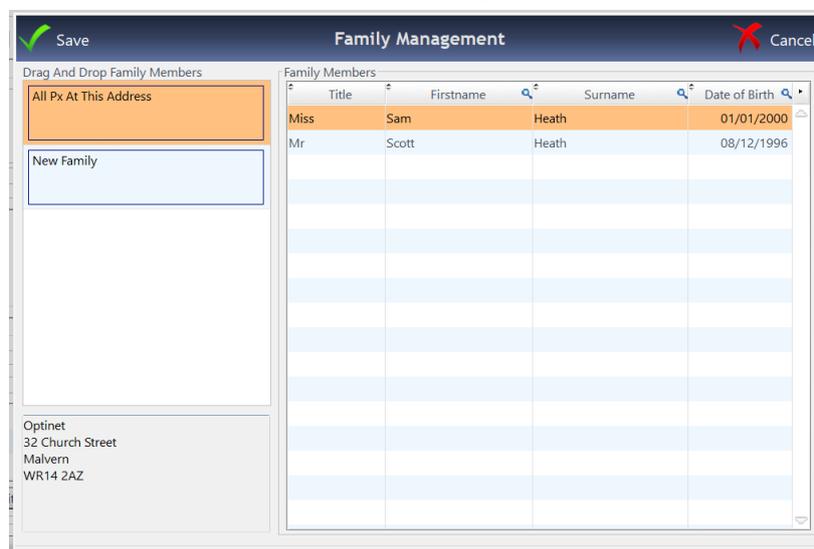


Searches can be done with any of the following:

- The patient reference number
- The patient surname and first name. EG *SMITH,John* must have a comma in between. If searching first name only, prefix search with a common EG *,John*
- The patients home or mobile telephone number (home phone requires area code)
- The patients postcode.
  - Once you have found the record that you want, double-click it and it will open the Patient Record screen. To update any details, press **Update**. Their record will open in a separate window and you can update accordingly.
- Family

People living at the same address can be grouped together under **Family**.

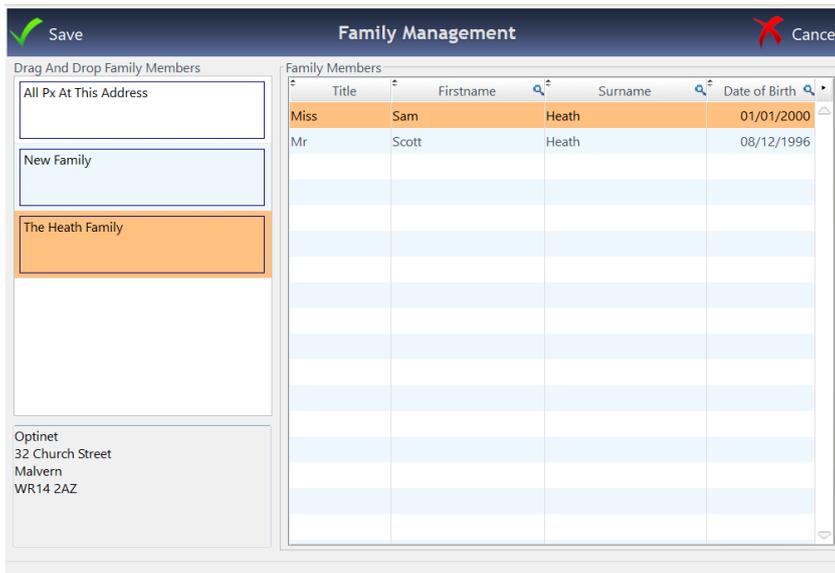
- From Patient Record
- Click **Update**
- Click on **Other Actions** on Blue Bar
- **Assign to Family** – Following screen is now visible.
- Select all family members, click and drag into **New Family**



- **The Family Name** box will allow you to change the name if required but will default to the Family name of those chosen.



- Family members are now linked. Save



- **Update Timeline** will now be required.
- On each family member there is now a family icon



- By clicking on the icon, information regarding any balances, last Test, next test date due dates etc will be displayed regarding these members.

Name	Balance	Last Test	ST Due Date	AD Due Date	CL Due Date
Heath, Sam (Miss)	£465.00	14/12/2021	14/12/2022		15/12/2022
Heath, Scott (Mr)	£0.00	16/12/2021	16/06/2023		

- To access the patient data of these members click on the name and FLEX will open the patient record.

## Home Screen Widgets: Arrivals

The Arrivals Widget shows a list of patients who have been booked into the diary for an appointment, and are due to arrive today.

Patients will appear with **a pale yellow band** 15 minutes before they are due.

Patients will appear with **a pale red band** when they are overdue.

Arrivals: 2

Time	Reason	First name	Surname	Title	Room
11:00	NHS Sight Test	Jillian	Jones	Mrs	Optom Room 3
11:40	NHS Sight Test	Sam	Heath	Miss	Optom Room 3

Time	Reason	First name	Surname	Title	Room
11:00	NHS Sight Test	Jillian	Jones	Mrs	Optom Room 3
11:40	NHS Sight Test	Sam	Heath	Miss	Optom Room 3

-  Arrived
-  Failed To Attend
-  Cancel Appointment

## Home Screen Widget: Staff Tasks

The Staff Tasks widget shows you your daily tasks. It shows both those which you have created yourself and also those which have been tasked to you by other staff members. This can be especially useful from a management perspective as you can task specific staff member's to do certain things, but also keep all staff members informed of important information by assigning a task to ALL staff members.

## Creating New Tasks

- To create a new task, click **New** on the Tasks Widget. The Date, Time and Staff Member will be filled out automatically.
- Type in the details of task, then select which staff member to assign the task to from the drop down menu. (Leave this blank to assign the task to ALL staff members.)
- Click **Save** to save the new task. It will then be listed in the My Tasks Widget for all staff members which it is assigned to. More details about this are available online.

## Home Screen Widgets: Timeline

A matrix display of all the Letters, SMS, Emails and Phone Calls due for Recall, Notifications and Marketing.

## Patient Records

Adding a patient record can be done from 3 different parts of the system. Each is detailed below.

### 1. The Home Screen

On the patient search widget, if you can't find the patient you are looking for then press the new patient button. This will open the new patient entry form.



### 2. From An Existing Patient Record.

On an existing Patient record, first click on **New** in the top menu bar then select **Patient** at the bottom of the drop down menu. This will also open the new patient entry form. You can also choose **New – Family Member**. This will open up a new record card, but with generic details already completed (Surname, Address, Home Phone, Doctor, Surgery).

### 3. When Booking an Appointment.

When booking an appointment, a new patient can be added by clicking the **New Px** button.

This opens the search window into a data entry screen for the new patients' details. This final method is perhaps best for entering details if someone has called up or you are in the middle of something else, as slightly less details are required. You can then right click on the appointment and click **Go to Patient Record** to quickly travel back to the patient record.

## The Active Patient List

The Active Patient List displays at a glance all of the Patients who are in the practice, are expected to arrive or are being "actioned" in some way.

Patients are to the list when they have been marked as "Arrived" / "Attended" in The Home Screen / Appointments view, or they have been "double-clicked" through the patient search window.

Patients will be displayed in the list for the following reasons:



**D** = Dispensing - A new [Dispense](#) has been created for the patient.

**P** = Paying - A new [Till](#) Receipt has been created for the patient.

**T** = Testing - A new Test has been created for the patient.

**A** = Active - The patient has been manually added to the list using Patient Search.

**E** = Expected - The patients appointment is due within 15 minutes.

**W** = Waiting - The patient has arrived for their appointment and is waiting to be tested.

You may not see all of these letters (yet), depending on how much of the software you are using.

To remove a patient from the list, right click on them and select **Dismiss Patient**. A patient will be dismissed after **30** minutes of inactivity on their record, although this dismissal time is customisable in the setup menu, under the branch section.

## Adding a Sight Exam Record (Prescription)

When a new **Sight Exam Record** has been selected from the **New** button at the top of the Patient Record, one of two windows will be created. This will be dependent on whether or not you use the **Clinical Module**. The Clinical Module gives Optometrists more detail, for example being able to carry out a customised Clinical Assessment, perform up to six refractions, create Clinical Drawings and upload Clinical Documents.

All staff members at practices using "Clinical" also have the option to enter a "Pre-Exam Record".

Note: Users with "Clinical" installed that are not set as an Optometrist will still see the standard test record. The table below shows what you can expect to see:

Tab	Clinical Mod	Non-Clinical
Medical Assessment	✓	✓ <i>Optoms only</i>
Clinical Assessment	✓	✗
Clinical Refraction	✓	/ <i>Called Prescription</i>
IOP / PD	✓	✓
Clinical Notes	✓	✓
Clinical Drawing	✓	✗
Clinical Documents	✓	✗
Clinical Billing	✓	✗
NHS / Recall	✓	✓

### Medical Assessment

Drop down boxes are available for answers to basic questions such as whether the patient is a driver, DSE (Display Screen Equipment - Computer) user and what their Occupation is. If their Occupation is not listed, the green + symbol can be used to add it. Notes can also be added at this stage.

To the right of the screen, Medication can be added. Again, the intuitive interface means they can be "Dragged and Dropped" across, or a new Medication added at the bottom of the screen. When this is added, it asks you if you would like to add it to the Dictionary. These answers will be remembered for next time.

**Miss Sam Heath** Ref: 15951  
DOB: 01/01/2000 (21 yrs)

**This Examination Record**

Date / Time: 08/12/2021 11:54 Last Test: [ ]  
 Optometrist: Mr Optinet Staff Member BVD: 12  
 Type: Sight Examination

**Previous Examination Results**

Date	Time	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
08/12/2021	11:54		+1.00	+0.25	12.00	0.00	0.00	
			+1.00	+0.25	12.00	0.00	0.00	

**Medical Assessment** | Clinical Assessment | Clinical Refraction | IOP & PD | Clinical Notes | Clinical Drawing | Clinical Billing | NHS / Recall

**General Assessment**

Driver? **Yes without Rx**  
 DSE User? **Yes without Rx** Type: [ ]  
 Dominance: [ ]

Referred By  
 GP  Self  Optometrist  
 Hospital  Recall  Other

Occupation  
 Px Occupation: [ ] +  
 Occupation Notes: [ ]

**Medication**

Current Medication

Medicine	Added	Removed
Sodium valproate	08/12/2021	

Available Medication

Library

- Sodium valproate
- Clopidogrel
- Simvastatin
- Phenytoin
- Dipyridimole
- Insulins
- Nicorandil
- Gabapentin
- Quinine Sulphate
- Trimethoprim
- Phenoxymethylpenicillin
- Benzylpenicillin
- Metronidazole

## Clinical Assessment

Questions and Answers can be added in the SETUP menu.

When clicking on a question in this tab will show the relevant answers to choose from on the left. The result column also gives the ability to add free text by double clicking into the box.

On the left of the window there are other tabs containing further questions. These too can be added to in the SETUP menu.

**Miss Sam Heath** NHS Ref: 15951 DOB: 01/01/2000 (21 yrs)

**This Examination Record**

Date / Time: 08/12/2021 11:54 Last Test: [ ]

Optometrist: Mr Optinet Staff Member BVD: 12

Type: Sight Examination

**Previous Examination Results**

	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
Date: 08/12/2021 11:54 R:		+1.00	+0.25	12.00	0.00	0.00	
Staff: Mr Optinet Staff Member L:		+1.00	+0.25	12.00	0.00	0.00	

Medical Assessment | **Clinical Assessment** | Clinical Refraction | IOP & PD | Clinical Notes | Clinical Drawing | Clinical Billing | NHS / Recall

**History**

Procedure	Result
Last Eye Test	
Where last test	
Reason For Visit	
Own Ocular History	
General Health	
Hobbies / Sports	
Family Ocular History	
Corrective Appliance Worn	
Condition Of Appliance	

**Procedure Dictionary**

- Can't remember
- Less than one year ago
- 18/12 ago
- 2 years ago
- More than three years ago
- Never had one before

## Clinical Refraction (Clinical) / Prescription (Non-Clinical)

This is where the Rx is entered. Clinical Users see this tab as **Clinical Refraction**, whilst non-clinical users see it as **Prescription**.

Non-clinical users will only be able to enter one Rx. Clinical Users can enter up to six types of test, and choose one as the Given. The number of tabs shown (between 1 and 6), and their names, can be customised within the **Examination** Tab of the Setup menu.

Clinical users can use the **Copy** button at the top of the window to copy results from a **Previous Rx**, from one Rx to another. Clinical users can also **Transpose** the Rx accordingly.

Press tab to move between boxes. Validation of data occurs where necessary (for example if a Cyl has been entered, the Axis cannot be blank). The VA's can be entered in any format. "6/" and "N" (for near) will appear accordingly.

When the **Right Addition** is entered, the **Left Addition** will be automatically filled out, and the **Intermediates** and **Nears** for both eyes automatically calculated.

**Miss Sam Heath** Ref: 15951  
 NHS DOB: 01/01/2000 (21 yrs)

This Examination Record: Date/Time: 08/12/2021 11:54 Last Test: [dropdown]  
 Optometrist: Mr Optinet Staff Member BVD: 12  
 Type: Sight Examination

	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
Date: 08/12/2021 11:54 R:		+1.00	+0.25	12.00	0.00	0.00	
Staff: Mr Optinet Staff Member L:		+1.00	+0.25	12.00	0.00	0.00	

Medical Assessment | Clinical Assessment | **Clinical Refraction** | IOP & PD | Clinical Notes | Clinical Drawing | Clinical Billing | NHS / Recall

**Last Test**  
 R: +1.00 / +0.25 x 12  
 L: +1.00 / +0.25 x 12

**Obj**  
 R: Plano  
 L: Plano

**Subj**  
 R: Plano  
 L: Plano

**Given**  
 R: +1.00 / +0.25 x 12  
 L: +1.00 / +0.25 x 12

**Right Distance (Last Test)**  
 Sph: +1.00 Cyl: +0.25 Axis: 12.0  
 Prism H: 0.00 Base: [dropdown] Unaided: [checkbox]  
 Prism V: 0.00 Base: [dropdown] Aided: [checkbox]  
 Balance Lens: [checkbox] Pinhole: [checkbox]

**Left Distance (Last Test)**  
 Sph: +1.00 Cyl: +0.25 Axis: 12.0  
 Prism H: 0.00 Base: [dropdown] Unaided: [checkbox]  
 Prism V: 0.00 Base: [dropdown] Aided: [checkbox]  
 Balance Lens: [checkbox] Pinhole: [checkbox]

**Right Addition (Last Test)**  
 Add: [dropdown] Plano Inter: [dropdown] Plano

**Left Addition (Last Test)**  
 Add: [dropdown] Plano Inter: [dropdown] Plano

**Right Intermediate (Last Test)**  
 Sph: Plano Cyl: 0.00 Axis: 0.0  
 Prism H: 0.00 Base: [dropdown] Unaided: [checkbox]  
 Prism V: 0.00 Base: [dropdown] Aided: [checkbox]

**Left Intermediate (Last Test)**  
 Sph: Plano Cyl: 0.00 Axis: 0.0  
 Prism H: 0.00 Base: [dropdown] Unaided: [checkbox]  
 Prism V: 0.00 Base: [dropdown] Aided: [checkbox]

**Right Near (Last Test)**  
 Sph: +1.00 Cyl: +0.25 Axis: 12.0  
 Prism H: 0.00 Base: [dropdown] Unaided: [checkbox]  
 Prism V: 0.00 Base: [dropdown] Aided: [checkbox]  
 Pinhole: [checkbox]

**Left Near (Last Test)**  
 Sph: +1.00 Cyl: +0.25 Axis: 12.0  
 Prism H: 0.00 Base: [dropdown] Unaided: [checkbox]  
 Prism V: 0.00 Base: [dropdown] Aided: [checkbox]  
 Pinhole: [checkbox]

Dist Bino. Vision: Unaided [checkbox] Aided [checkbox]  
 Notes: [text area]  
 Near Bino. Vision: Unaided [checkbox] Aided [checkbox]

## IOP / PD

The next tab in the examination involves entering the Inter-Ocular Pressures and Pupillary Distances. Corneal Thicknesses can also be entered on this screen.

**Miss Sam Heath** Ref: 15951  
DOB: 01/01/2000 (21 yrs)

This Examination Record  
Date / Time: 08/12/2021 11:54 Last Test: [ ]  
Optometrist: Mr Optinet Staff Member BVD: 12  
Type: Sight Examination

Previous Examination Results

	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
Date: 08/12/2021 11:54 R:		+1.00	+0.25	12.00	0.00	0.00	
Staff: Mr Optinet Staff Member L:		+1.00	+0.25	12.00	0.00	0.00	

Medical Assessment | Clinical Assessment | Clinical Refraction | **IOP & PD** | Clinical Notes | Clinical Drawing | Clinical Billing | NHS / Recall

1st IOP Readings  
Device: [ Tonometer ]  
Eye Drops: [ ]  
Expiry: [ ] Dosage: [ ]  
Batch #: [ ]

**Right IOP**

1st IOP	1.00	1st Time	11:54
2nd IOP	10.00	2nd Time	11:54
3rd IOP	[ ]	3rd Time	[ ]
4th IOP	[ ]	4th Time	[ ]
Ø mmHg	5.50		
Ø kPa	[ ]		

**Left IOP**

1st IOP	[ ]	1st Time	[ ]
2nd IOP	[ ]	2nd Time	[ ]
3rd IOP	[ ]	3rd Time	[ ]
4th IOP	[ ]	4th Time	[ ]
Ø mmHg	[ ]		
Ø kPa	[ ]		

**2nd IOP Readings**

Device: [ Tonometer ]  
Eye Drops: [ ]  
Expiry: [ ] Dosage: [ ]  
Batch #: [ ]

**2nd Right IOP**

1st IOP	[ ]	1st Time	[ ]
2nd IOP	[ ]	2nd Time	[ ]
3rd IOP	[ ]	3rd Time	[ ]
4th IOP	[ ]	4th Time	[ ]
Ø mmHg	[ ]		
Ø kPa	[ ]		

**2nd Left IOP**

1st IOP	[ ]	1st Time	[ ]
2nd IOP	[ ]	2nd Time	[ ]
3rd IOP	[ ]	3rd Time	[ ]
4th IOP	[ ]	4th Time	[ ]
Ø mmHg	[ ]		
Ø kPa	[ ]		

**Right PD**

Dist PD	0.0
Int PD	0.0
Near PD	0.0

**Left PD**

Dist PD	0.0
Int PD	0.0
Near PD	0.0

**Right Corneal Thickness**

CCT (µm) 0

**Left Corneal Thickness**

CCT (µm) 0

View IOP History

As IOP readings are entered, an average is automatically calculated. By using the **TAB** key on the keyboard to cycle through the boxes, the times of the reading are automatically entered.

PD reading are also automatically updated. For example, if 66 is entered as the Right PD Dist, it will automatically split the values for Right and Left. These can of course be changed manually.

## Clinical Notes

Any Clinical Notes can be created which will print out on the Rx accordingly. These are all "Free Text" fields. Information can be added here after the examination if necessary: The Clinical Record can be updated in the Patient Record as required.

The Clinical Billing section allows Optometrists to start a receipt for a patient in the testing room. The screen is shown below.

The sundry product group is shown in the right-hand third of the screen under **Available Items**.

(In the setup menu, **Quick Pick Items** can be set up. This will show the most commonly used items will be accessible and added to px bill easily. Double click on the ones required.

**Miss Sam Heath** (NHS) Ref: 1595  
DOB: 01/01/2000 (21 yr)

**This Examination Record**  
Date / Time: 08/12/2021 11:54 Last Test: [ ]  
Optometrist: Mr Optinet Staff Member BVD: 12  
Type: Sight Examination

**Previous Examination Results**

	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
Date: 08/12/2021 11:54 R:		+1.00	+0.25	12.00	0.00		0.00
Staff: Mr Optinet Staff Member L:		+1.00	+0.25	12.00	0.00		0.00

Medical Assessment | Clinical Assessment | Clinical Refraction | IOP & PD | **Clinical Notes** | Clinical Drawing | Clinical Billing | NHS / Recall

**Items for Billing**

Description	Price	Posted
Lenses	£10.00	<input checked="" type="checkbox"/>
Total £10.00		

**Quick Pick Items**

Desc: Sundries Price: £0.00

Desc: NHS TEST Price: £21.71

Desc: CL Fees Price: £0.00

**Available Items** Filter By Sales Group: ALL

Barcode	Description	Qty	Selling Price
1	Frame	0	£0.00
2	Lenses	0	£0.00
3	Sundries	0	£0.00
4	Contact Lenses	0	£0.00
5	Solutions	0	£0.00
6	NHS TEST	0	£21.71
7	Retinal Imaging	0	£0.00
8	Private Test	0	£0.00
9	Repair	0	£0.00
10	CL Fees	0	£0.00
11	rayban	0	£10.00
12	coco	0	£0.00

## NHS / Recall

This is one of the most important pages within the Sight Test, whether or not you use the Clinical Module. A recall will HAVE to be added here, FLEX will not allow test to be saved without one.

The screenshot displays the NHS / Recall interface for Miss Sam Heath. The patient's name is Miss Sam Heath, Ref: 15951, and DOB: 01/01/2000 (21 yrs). The interface is divided into several sections:

- This Examination Record:** Date/Time: 08/12/2021 11:54, Last Test: [blank], Optometrist: Mr Optinet Staff Member, BVD: 12, Type: Sight Examination.
- Previous Examination Results:** A table showing results for 08/12/2021 11:54.
 

	Unaided	Sphere	Cyl	Axis	Prism	Add	Aided
Date: 08/12/2021 11:54 R:		+1.00	+0.25	12.00	0.00	0.00	
Staff: Mr Optinet Staff Member L:		+1.00	+0.25	12.00	0.00	0.00	
- Medical Assessment / Clinical Refraction / IOP & PD / Clinical Notes / Clinical Drawing / Clinical Billing / NHS / Recall:** A series of tabs for different assessment types.
- NHS Entitlements:** A list showing 'Prisoner on Leave' as the current entitlement. There are buttons for 'GOS Entitlements' and 'Early Retest'.
- Recall:** Two tables are shown:
  - Selected Recalls:**

Description	Months	Due Date
12 Month Recall	12	08/12/2022
  - Available Recalls:**

Description	Months	Type
12 Month Recall	12	SE
18 Month Recall	18	SE
3 Month Recall	3	SE
6 Month Recall	6	SE
9 Month Recall	9	SE
- Recommendations:** A list of options for lens recommendations, including Single Vision, Bifocal, Varifocal, Hi Index Material, Polycarbonate, Aspheric, UV Filter, Anti Reflection, Scratch-resistant, Photochromic, and Contact Lenses.

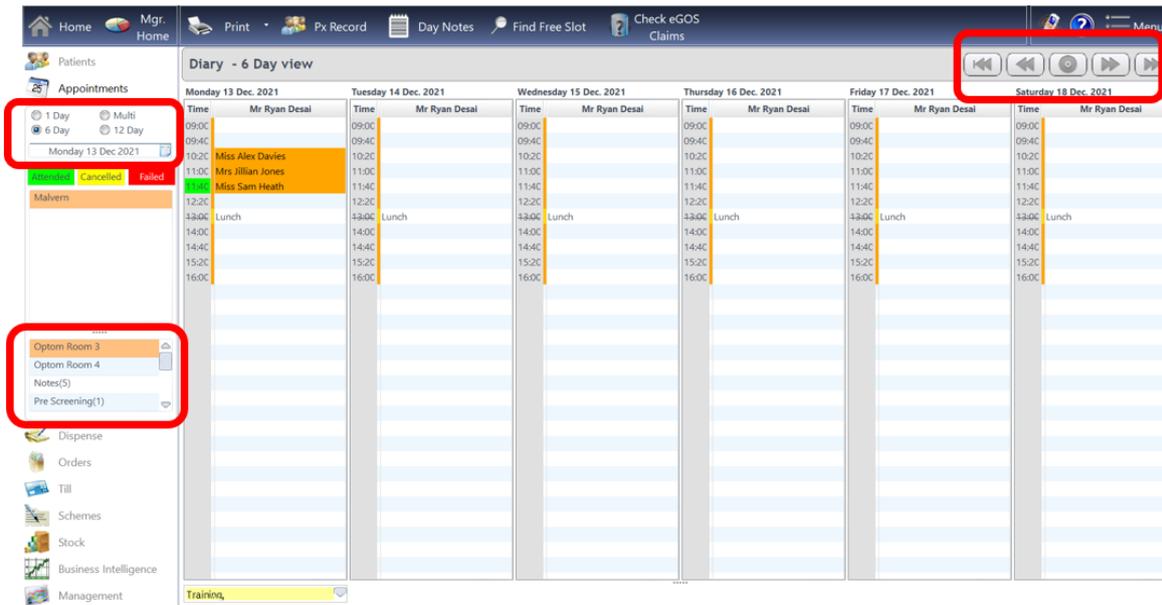
The **Recall** schedule can be set by selecting a template from the **Available Recalls** area. One Sight Exam (SE) can be set, with multiple Additional Exams (AD) added with no limit. For example, the next sight examination may be in 12 months, but a pressure check is required in 4 weeks.

You can update the number of months by double clicking the number and typing the number you require

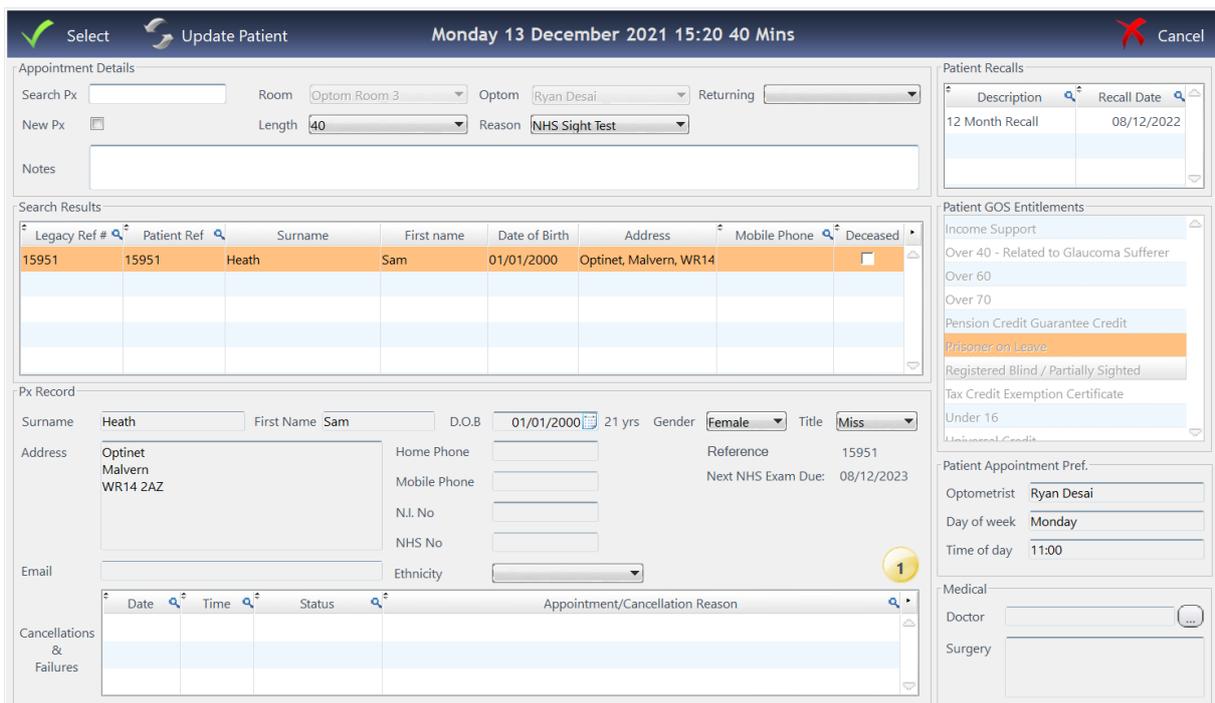
FLEX will then automatically give the date and populate the Patient Timeline according to their contact preferences (Letter, Email, Text Message).

## The Appointments Diary: Booking an Appointment

Click onto "Appointments" on the left-hand side of FLEX. 4 different views can be chosen in the diary: **1 Day**, **6 Day**, **12 Day** and **Multi** (1 day view of all Rooms). These are selectable towards the top left hand side of the appointments window. You can also use the **filters** shown to show different rooms and, if applicable, branches. To book an appointment, double-click the time-slot desired.



When an appointment time and date is selected, this following window will open:

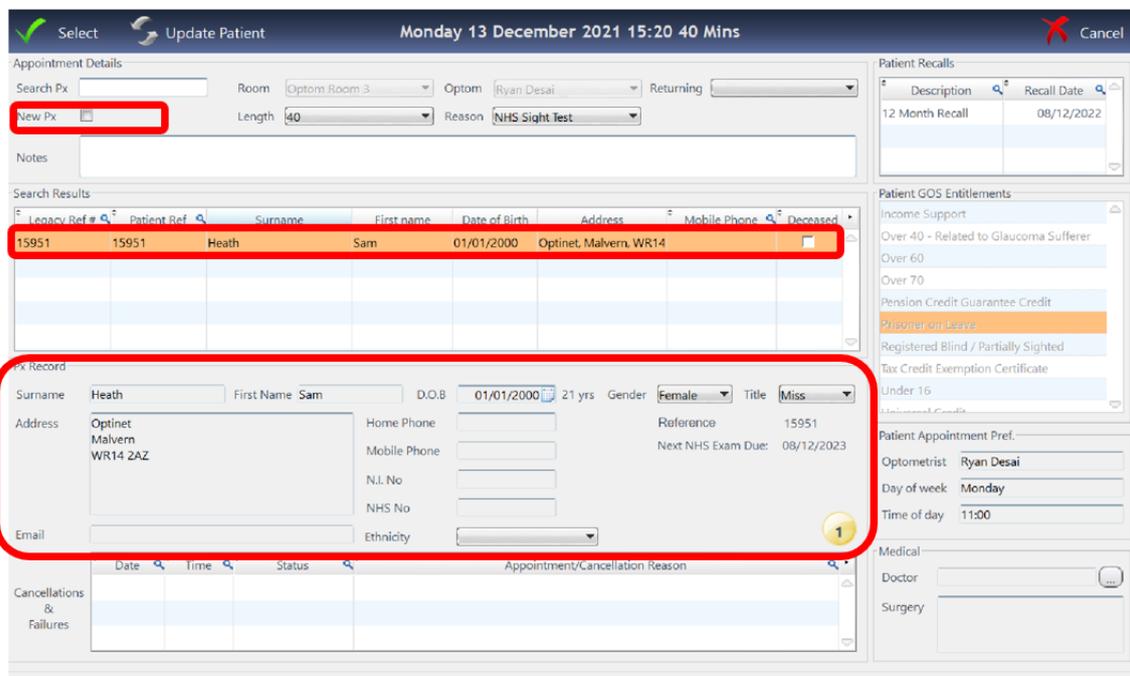


You can search for a patient in just the same way as the home screen, including using the same searching criteria.

The patient details will be shown in the bottom third of the window.

HOWEVER, if the patient is new to practice, check the box **New Px**. The bottom third of the screen then becomes editable. You can also press **Update Patient** in the top of the window to open up these fields.

The Appointment Length, Appointment Reason and Returning Reason can be set in the top-third of the window. The appointment length will default to that of the slot, but as you update appointment reasons, the relevant length will be shown. Choose the relevant answers from the drop-down menus. Below is an example of a searched for record:

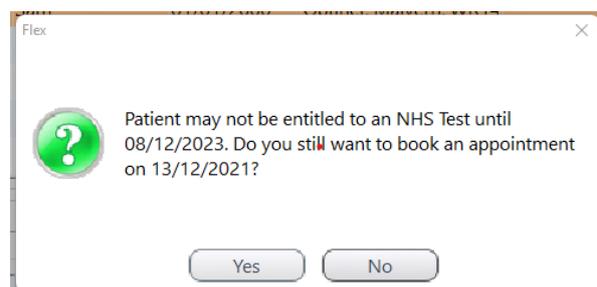


The Patient GOS entitlements are also shown on the screen, in the right-hand quarter of the screen. Age related entitlements (Under 16, Over 60, Over 70) are populated automatically. Hold down **Ctrl** and click to select multiple entitlements.

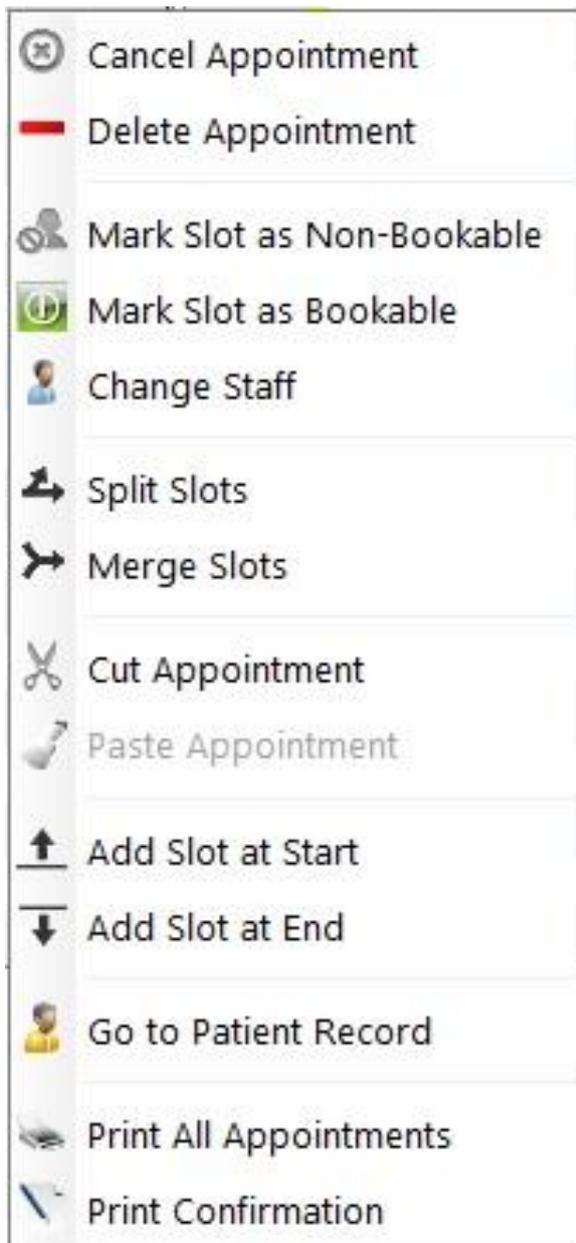
Patient recalls are shown in the top-right corner and appointment history (e.g. any cancelled appointments) are shown at the bottom of the screen.

Stars are also shown, along with all the details you could need at a glance.

Note: If a patient is trying to book an NHS test, but they are not yet due, FLEX will warn you.



## Modifying an Appointment Slot



A single right-click on a slot brings up this menu: let's look at the functions:

When **Cancel Appointment** is selected, a box will be displayed asking for a cancellation reason. Enter the reason and press **Save**. This will be stored in the patient record under "Consent/App.Hist" tab, and shown when an appointment is booked in the future.

When **Delete Appointment** is selected, a box will be displayed asking if you are sure you wish to delete the appointment. *Delete is normally used for "in-house" errors or updates, whilst cancellations are noted on the Patient Record.*

A slot can be marked as **Non-Bookable** if required, for example for Staff Training, a Meeting etc. Right-click, choose "Mark Slot as Non-Bookable" and select a reason.

A slot can be marked as **Bookable** again if it was previously changed, just right-click on the slot and select the option.

Pressing **Change Staff** allows the appointment(s) selected to be given a new staff member, which can be chosen from the resulting list which appears.

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.

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?

If you wish to move an appointment, the **Cut & Paste Appointment** functions can be used. Right-click Cut, find the new desired appointment time, Right-click Paste.

**Add Slot at Start** creates a new, default length appointment at the start of the day.

**Add Slot at End** creates a new, default length appointment at the end of the day.

You can print the A4 "clinic" by pressing "**Print All Appointments**".

You can also click "**Print Confirmation**" and a slip for the appointment time you selected will print if you have a receipt printer (otherwise it goes to your A4 printer).

## Modifying a booked Appointment

To modify a booked appointment, double (left) click on it. The window below appears:

This screen is usually used for changing an appointment reason, adding a Returning reason or adding notes, although you can also **Update Patient** details through here. When you are done, click **Save** in the top-left corner.

### Looking Ahead

April 2014						
M	T	W	T	F	S	S
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	9	10	11

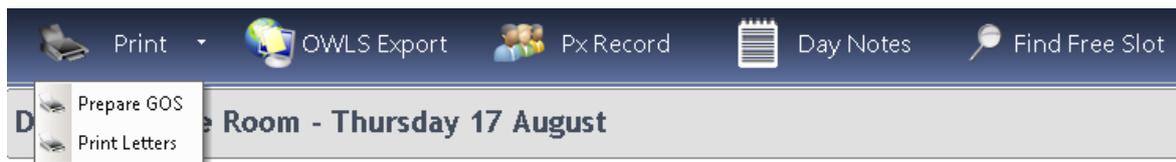


The "Jumper" at the top-right of the window allows you to:

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

Alternatively, you can select a date from the calendar on the far left-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



## Print

This button brings up two options:

**Prepare GOS** allows GOS paperwork for NHS Appointments for the day to be printed.

When the button is pressed, a list of all NHS Patients who are booked in for NHS Appointments will appear, all selected by default. Patients can be de-selected, by single clicking on their name, or re-selected by clicking on their name again. A running total is shown at the top of the page. The patients shown in a sandy coloured bar are the ones who are selected. When Print is then pressed within Prepare GOS, it will ask which form you would like to print.

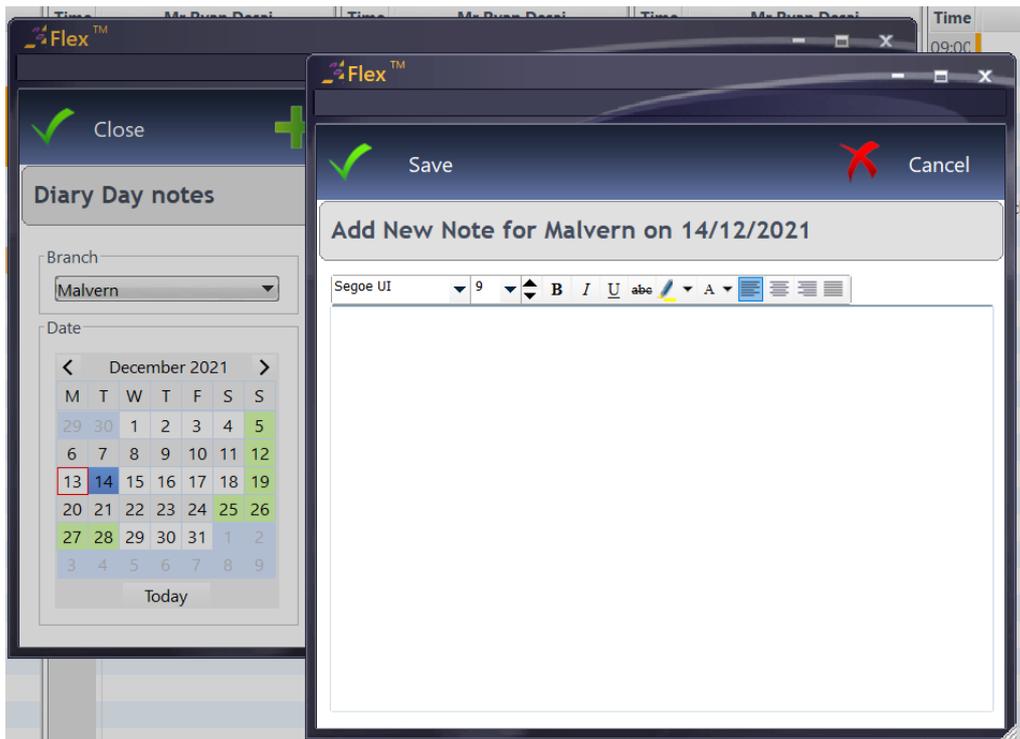
**Print Letters** allows documents and letters to be printed from the appointment diary for a selection of patients in a clinic, in the same way that GOS forms can be. Select the Template Group and then the Template Name. This is shown below.

Room	Patient
Optom Room 3	Alex Davies
Optom Room 3	Jillian Jones
Optom Room 3	Sam Heath

## Day Notes

Press the Day Notes button at the top of the Appointments screen. The box below will be shown. The button on the first window that comes up will give you the option to create a **New** note or **Update** an existing note if there is one on the day already.

The Day Note added then appears at the bottom of the day in a pale yellow colour (like a "Post-It" note) in the Diary and also at the top of the "Arrivals" widget on the Home Screen.



## Find Free Slot

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

A window will pop up (see above) that will allow you to search for any free slots that are available. Use the drop-down menus at the top left to select the day of the week, appointment type, member of staff and branch. 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.

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.

Select
 Close

<p>Branch</p> <p>Beta Version</p> <hr/> <p>Day</p> <p>Monday</p> <p>Tuesday</p> <p>Wednesday</p> <p>Thursday</p> <p>Friday</p> <p>Saturday</p>	<p>App. Type</p> <p>NHS Eye Exam</p> <p>Please Select</p> <p>NHS</p> <p>Private</p> <p>Child</p> <p>Dilation</p> <p>Dilation Return</p> <p>Cyclo</p> <p>Cyclo Return</p> <p>CL Fit</p> <p>CL Aftercare</p>	<p>Staff</p> <p>Mrs cnn Hkmmldn</p> <p>Mr aaktv qssj</p> <p>Mr Ddhn avlxad</p> <p>Mr Shenthen Stvhnjnrm</p> <p>Miss Samantha Heath</p> <p>Mrs Stsshknls Lsmsty-Lsm</p>	<table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-right: 1px solid #ccc;">From</td> <td style="width: 50%;">To</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">08:00</td> <td>11:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">09:00</td> <td>12:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">10:00</td> <td>13:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">11:00</td> <td>14:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">12:00</td> <td>15:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">13:00</td> <td>16:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">14:00</td> <td>17:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">15:00</td> <td>18:00</td> </tr> <tr> <td style="border-right: 1px solid #ccc;">16:00</td> <td>19:00</td> </tr> </table>	From	To	08:00	11:00	09:00	12:00	10:00	13:00	11:00	14:00	12:00	15:00	13:00	16:00	14:00	17:00	15:00	18:00	16:00	19:00
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16:00	19:00																						

Search  calendar day(s) ahead

Results

Day	Branch	Time	Staff
Tuesday 14 December 2021	Beta Version	09:00	Miss S Heath
Wednesday 15 December 2021	Beta Version	09:00	Shenthen Stvhnjnrm
Thursday 16 December 2021	Beta Version	09:05	Shenthen Stvhnjnrm
Friday 17 December 2021	Beta Version	09:10	Shenthen Stvhnjnrm
Saturday 18 December 2021	Beta Version	09:15	Shenthen Stvhnjnrm
Monday 20 December 2021	Beta Version	09:20	Shenthen Stvhnjnrm
Tuesday 21 December 2021	Beta Version	09:25	Shenthen Stvhnjnrm

## Till

Click "Till" on the left-hand side of FLEX to bring this module up. If the Dispense and Order modules of FLEX are being used, the balance due from the patient for the items dispensed and ordered will be carried over to the till. It will be itemised on the right hand side of the screen. Note that the name of the patient appears towards the top of the screen. All historical receipts are shown in the **Active Px Receipts** on the left-hand side.

If the modules are not being used, double-click the patient to be used from the Active Patient list (under the **Patients** tab) and then press **Patient Sale**. **This is very important – if it is not pressed, you will charge items to a different patient.** A new receipt for a patient can also be created by pressing the little down-pointing triangle just to the right of Patient Sale.

The screenshot displays the FLEX Till interface for patient Miss Sam Heath. The interface is divided into several sections:

- Header:** Shows the patient name "Till: Miss Sam Heath" and the NHS logo.
- Receipt Number:** # 45567, Branch: Malvern.
- Date Details:** Date: 13/12/2021, Time: 15:05.
- Patient Details:** Balance: £ 544.00, Ref #: 15951, Age: 21, Loyalty: £ 0.00.
- Staff Details:** Staff: Optinet Staff Member, DO: Optinet Staff Member, OO: Optinet Staff Member.
- Buttons:** A grid of buttons for services: Top Level, Qty, Frames, Lenses, Contact Lenses, Sundries, Solutions, Imaging, Private Test, NHS Test, CL Fees, fees, Repair, Bank Payment, AMEX, Cash, Card, Vouchers.
- Balance to Pay:** A large display showing 320.00.
- Items on Receipt:** A table listing items and their amounts.
 

Description	Amount
<b>Items</b>	<b>£341.71</b>
coco *	£250.00
1.5 Aspheric Stock *	£35.00
1.5 Aspheric Stock *	£35.00
NHS TEST *	£21.71
<b>Vouchers</b>	<b>£21.71</b>
NHS Test *	£21.71

If the Dispense / Order modules are not being used, the items to be purchased must be entered manually. This can be done by clicking on the relevant "Cost Centre" (for example FEES, SOLUTIONS etc.) button. The buttons will:

1. Ask for a stock item to be picked from a list,
2. Ask for a price to be entered,
3. Charge a set amount for an item straight away.
4. Take you to another level of buttons. (You can press **Top Level** to get back to the start).

If a sale is not for a patient (i.e. Cash Sale / Walk-In), it is classed as a **Non-Patient Sale**. Click **Non-Patient Sale**: a new receipt will be created and there will be no patient name in the top-left corner.

## Payment

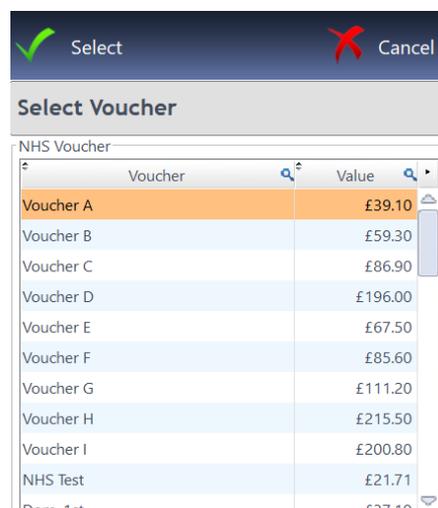
Please note that the Till buttons will vary in layout, colour and text depending on how your system has been SETUP however the process for taking payment for a **Patient Sale** or a **Non-Patient Sale** is the same.

All the payment methods (CASH, VISA/MASTER, AMEX, CHEQUE) work in the same fashion, giving you the option to enter a default amount, the exact balance or a balance that you set using the box shown below. This appears when any payment method button is pressed.



If there is an amount left to pay (for example £14.50) and £20 is selected, a box will come up advising the amount of change to give (in this example, £5.50).

To pay with an NHS voucher, press the NHS VOUCHER button on the Till (your label may vary, e.g. NHS, VOUCHER, GOS). A box comes up showing the different amounts. Select the correct row, and that amount will be taken off the balance owing (i.e. the cost of the lenses etc. has to be rung through first).



To **Print a Receipt**, simply press the button shown below (left). This can print to A4 or Receipt roll paper, depending on your Setup . Press **Email Receipt** to start sending an email. The receipt will be attached "in the background" as a PDF file. If the Patient has no email address on their record, it will ask for one and then retain it.

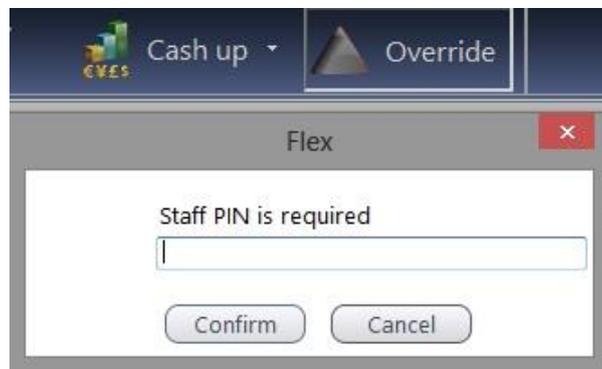


### Over-ride

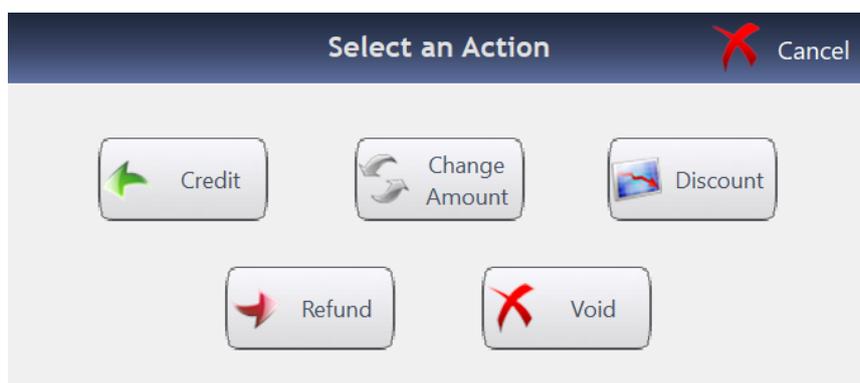
The over-ride function allows the "Cashier" a variety of functions.

*Note: Users may or may not be able to use the full functionality of over-ride if they are not given the permissions in the Setup .*

To access the screen, double click on the item to be edited, or press **Override**. Staff PIN is required. Enter this and press confirm. *The Staff PIN can be entered by any staff user with access to the features, and does not have to be that of the current user.*



The over-ride screen is shown below the PIN screen.



**Credit:** A checkbox can be selected to credit the item, which will then appear as a negative balance on the receipt. This is used in tandem with Refund:

**Refund:** A box comes up asking if you want to give a refund, and the amount to process. This has to be used in tandem with Credit.

**Change Amount:** A box comes up asking you to enter a new total. Example of its use would be an item is scanned through as being £8.50, but was recently changed to £9.99.

**Discount:** Discounts can be applied in 2 ways. **Line Discount** - Discounts a single item (Line) on the till receipt. OR **Total Discount** - Discounts every item on the receipt. (Note : Total Discounts are % Only).

**Line Discount:**

**Click the item** you wish to discount, it will be highlighted orange when selected.

**Click Line Discount** at the Top of the screen.

**Click the discount type** you wish to apply, again it will be highlighted orange when selected.

**Click Select**

The type of discount and the new selling price will then be displayed against each item in the discounts window (as shown below.) Once all line discounts have been applied, click **Apply** to add these discounts to the receipt.

**Total Discount:**

**Click Total Discount** at the Top of the screen.

**Click the discount type** you wish to apply, it will be highlighted orange when selected.

**Click Select** The type of discount and the new selling price will then be displayed against each item in the discounts window (as shown below).

**Click Apply** to add these discounts to the receipt

**Void:** A checkbox can be selected to void the item(s). We urge caution here, as it effectively deletes the item. Credit / refund should be used to correct mistakes.

## Petty Cash

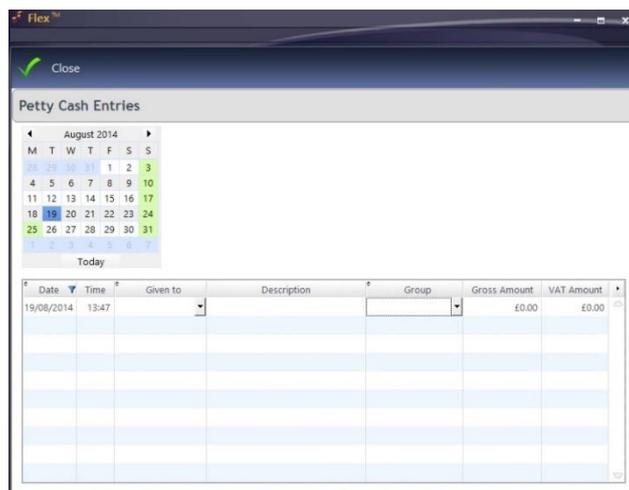
The Petty Cash function allows users to log and record small amounts of money taken out the till (for example for Newspapers, Milk, Stationery...)

To make an entry, press **Petty Cash** to open the window, select the date (default is today), click into **Description or Given to** fields and the current date and time are automatically added.

Next, find the staff members name from the drop-down list in the column titled **Given to**. A **Description** can be entered - for example Milk, Newspapers.

Select the **Group** (customisable in Setup) and enter the Gross Amount (and VAT will be worked out if applicable).

The window is shown below. To delete an entry, right-click on it and choose **Delete**.



## Cashing Up

Cashing Up can be done as many times a day as needed. Some practices cash up at the start of the day, most at (or towards) the end of each day.

FLEX accommodates any cashing-up regime. To cash up the Till, start by clicking the **Cash Up** button. Previous dates can be viewed (see bottom of page) in **View Previous**, but we will choose **Cash Up The Till**. Enter the **Opening Float** if prompted - it should auto-populate with yesterday's closing float.



This is the first screen (of 2) you will see: (note last cash-up date and time are shown)

### Left-hand "third"

Additional Float can be entered.

Further Petty Cash can be entered.

### Central "third"

Enter all the notes and coins in the Till

(This *should* equal the float plus the cash sales, less any petty cash drawn)

### Right-hand "third"

Enter the amounts taken for each "non-cash" payment method.

Usually this is from a z-reading from your card machine, and by counting the value of cheques.

After these details have been entered, this is the second screen (of 2) you will see:

Save and Lock Save Cash up record for 13/12/2021 Print Cancel

Back

Last Cash Up was at: 13/12/2021 15:42

Payment Method:	Computed Amount:	Manual Amount:	Difference
Card	£220.00	£220.00	£0.00
Cash	£0.00	£0.00	£0.00

Banking and Float

Additional Float: £0.00

Closing Float: £75.28

To be banked (Cash): £0.00

To be banked (Chq): £0.00

Notes

Lock

This will reconcile everything that has been entered. Discrepancies will show up in a red band. Amendments can be made to the **Banking and Float**. By default, the Closing Float will be the same as the opening one. You will see the amount of Cash and Cheques to be banked.

The **Cashing Up Summary** and/or **Petty Cash** reports can be printed from here. They are also available in the [Reporting](#) section of [Business Intelligence](#).

When you are happy, press **Save**. It will ask Do you want to lock the cashing up?

**If you do lock, you will not be able to amend any of the transactions up until that point.**

Are you sure you want to lock? Press **Yes, Lock** (or **No, Cancel**) and the cashing up is complete.

## To View Previous Records

Select "**View Previous**" from the **Cash Up** menu. The window below is displayed and a date can be selected. This brings up the "2 steps" window again. Records will only be shown here once they have been "Locked", and **Read Only** will appear at the top of the screen for reference.



Date	Opening Float	Closing Float
09/10/2013	£30.00	£30.00
10/10/2013	£30.00	£30.00
11/10/2013	£30.00	£30.00
12/10/2013	£30.00	£0.00
14/10/2013	£30.00	£30.01
15/10/2013	£30.01	£30.00
16/10/2013	£30.00	£30.00
17/10/2013	£30.00	£30.00
18/10/2013	£30.00	£30.00
19/10/2013	£30.00	£30.00
21/10/2013	£30.00	£30.00

## To Print

The **Cashing Up Summary** can be printed through the Business Intelligence > Reporting if users have access, or by going back into **View Previous** and pressing **Print** in the top-left corner.

## Locking and Unlocking

Receipts which have been fully paid off are automatically locked to prevent mistakes being made. Receipts are generally only unlocked if there is a balance on them.

If this is a new transaction it is better to create a new receipt. To Unlock an old receipt...

- Double Click the Padlock Icon on the Till Receipt.
- Enter Your Pin Number.
- The receipt is now unlocked.

To Re-lock the receipt, repeat the above three steps. The  button is shown above.

## Collecting

An item needs to be marked as collected to update the status of the NHS Voucher for processing. It's good practice to mark all items as collected as and when they have been collected. All Sight Test fees are marked as ready to be claimed automatically, but frames and lenses etc. need to be marked as collected on the Till before the money can be claimed.

To mark an item as collected, double-click on the shopping bag towards the top of the Till screen, the button is shown to the right:

**It will ask for a collection date to be entered.**

Once a date has been selected, the check-box will be ticked, and hovering over it will show the collection date. This is to the right:

