.

Get the most out of

FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

Schemes User Guide

Table of Contents

Schemes.... 3
Scheme Setup.... 4
Set up Scheme Packages.... 5
    Scheme Discount Setup.... 7
Banks / Export Settings.... 8
Add a Patient to a Scheme.... 9
    Scheme Details:.... 9
    Payment Details:.... 9
    Package Details:.... 10
Run / Reconcile Schemes.... 11

Schemes

- 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.

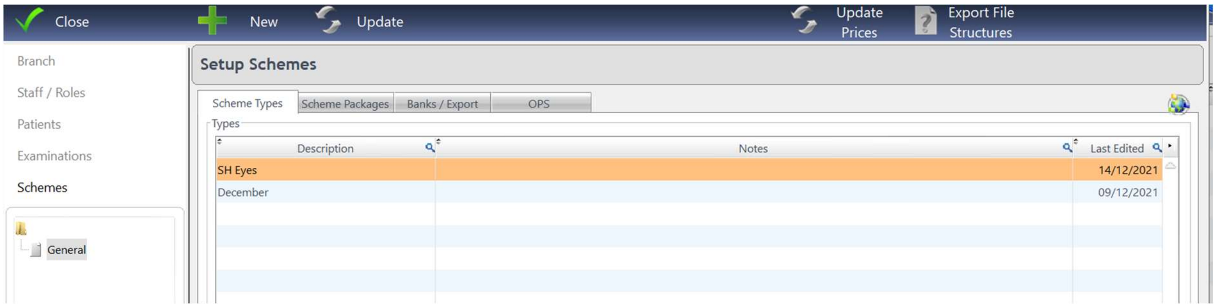
There are three main areas where schemes appear in FLEX. These are:

- Within the "Schemes" tab of Setup Menu
- Within the "Contact Lens" page of the Patient Record
- Within the "Schemes" menu option on left of the screen.

Scheme Setup

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.

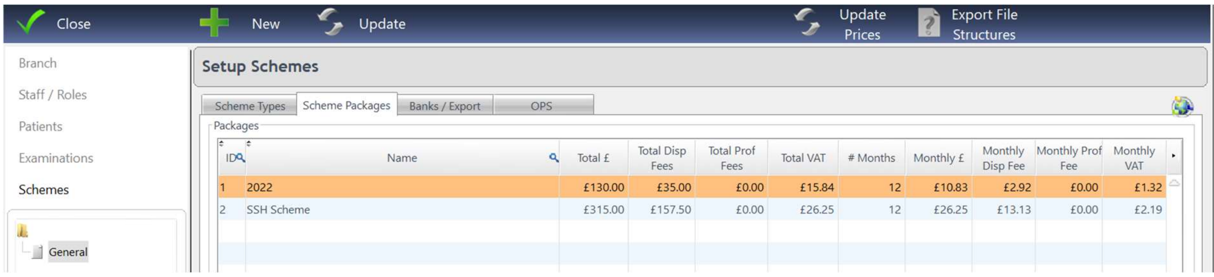


Press **New** to create a new Scheme type, or **Update** to amend an existing one. The same window appears, just the amount of information shown (if any) will vary depending on whether you pressed New or Update.

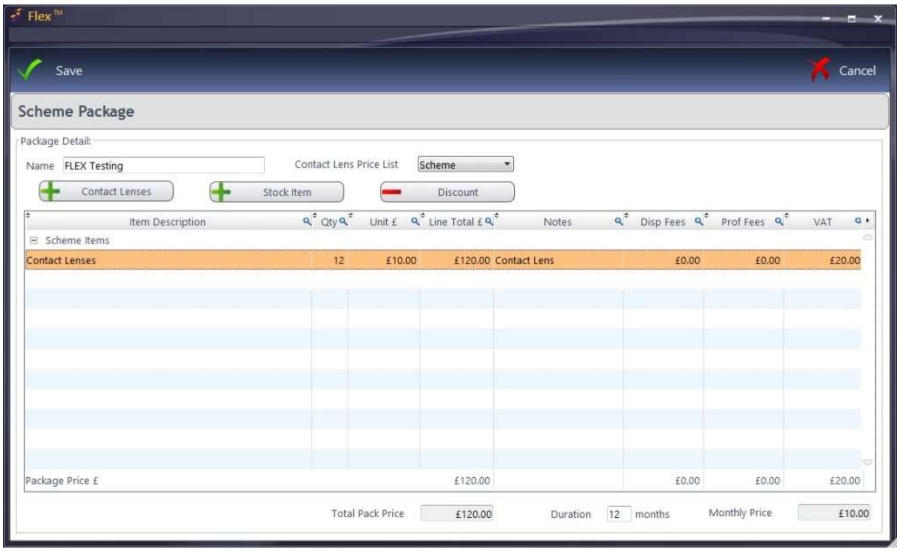
Scheme Name: Give the scheme a name
Scheme Package: A package can be assigned to the type (this is optional)
SMS / Letter Template: A template can be assigned to the scheme type. When a scheme is marked as collected, you have the option to schedule a letter or text message for the next collection date. 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.

Set up Scheme Packages

- Click on the Scheme Packages tab
- Shows any existing schemes as well as having the option to add a new one.



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.



- 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.

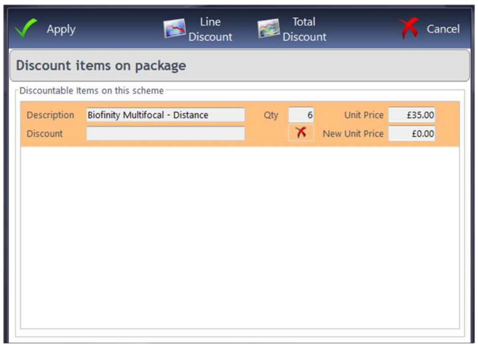
- The table shows the **Item Descriptions** on the package, how many are supplied (**Qty**), the total costs (**Unit** and **Line Total**) and any notes. **Disp Fees, Prof Fees** and **VAT** are also now shown.

- To add items, use the **+ Contact Lenses** and **+ Stock Item** buttons.

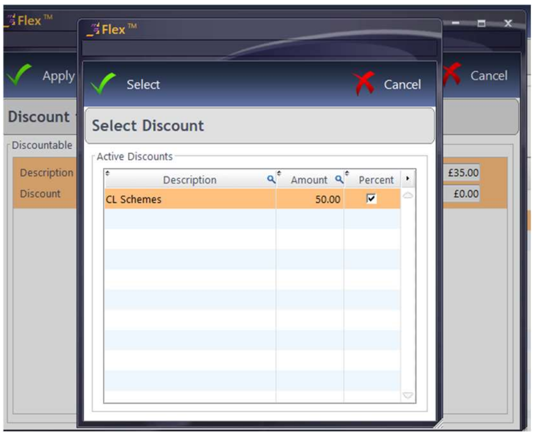
- A **- Discount** can also be applied through here. These work in a similar way to Till discounts. *(Setup of discounts is below)*

- To add to a scheme package, enter the contact lenses or stock items then click on the **Discount** button.

- Select the item to be discount and then click on **Line Discount.**

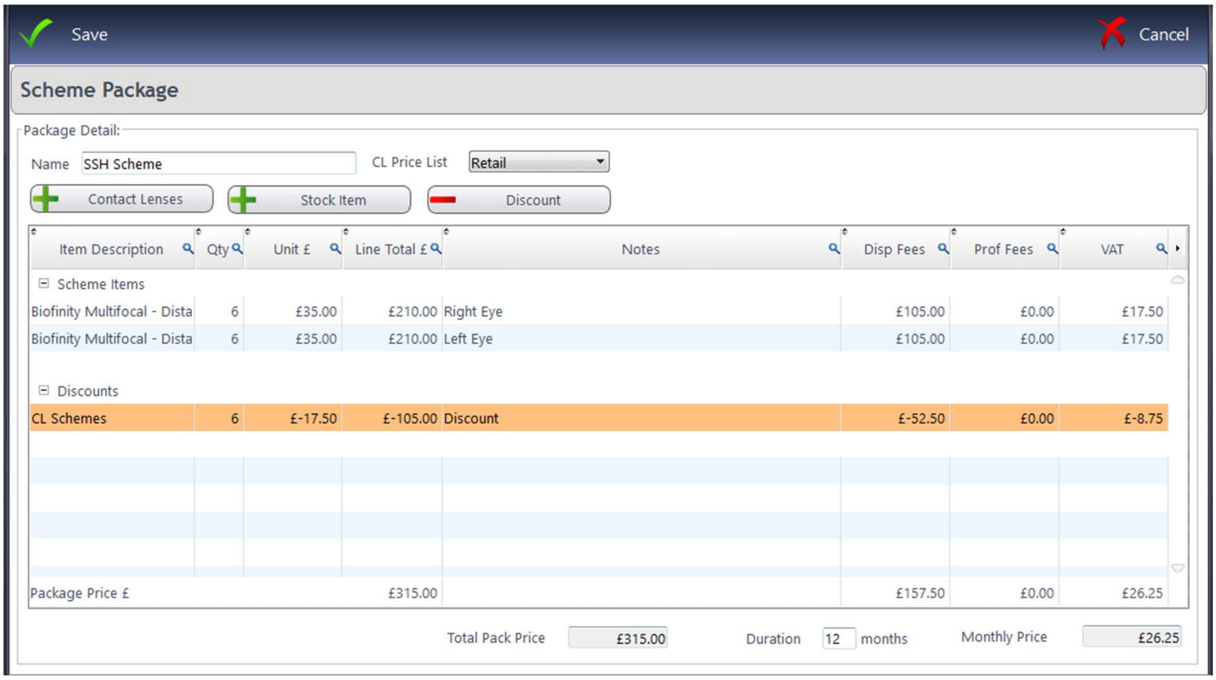


- Next **select** the scheme discount
- Then **apply** the discount



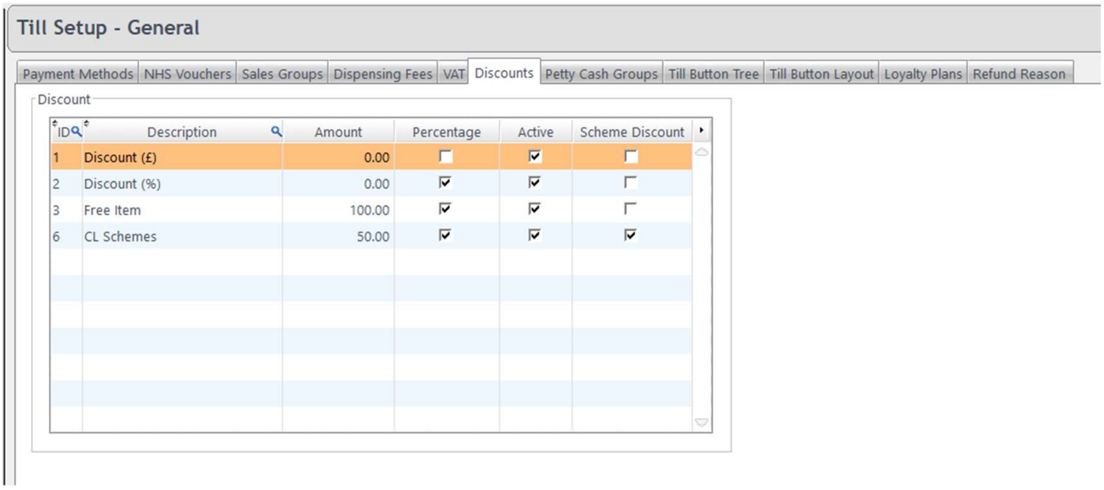
- The **+ Contact Lens** button will open up the contact Lens wizard. It will ask what the price for the item(s) should be, and how many boxes will be supplied over the period.
- The **+ Stock Item** will open up a list of stock to pick from. It will also ask how many of these items should be supplied over the period.

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



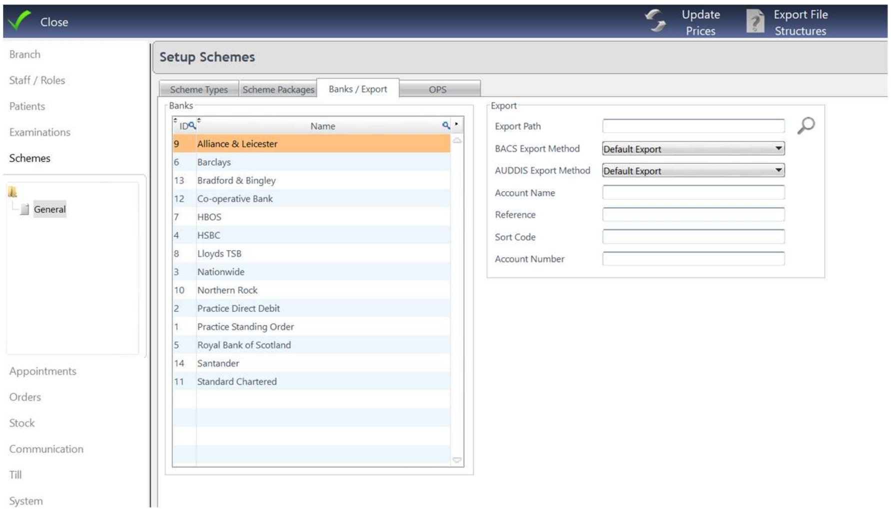
Scheme Discount Setup

In Setup Menu go to **Till** and **Discounts** tab**.** Click the next available description box, enter the discount name. In Amount, enter the percentage amount i.e 50 then tick percentage. Make sure that you have ticked **Active** and **Scheme Discount**. This discount will be available to apply to the scheme being created.



Banks / Export Settings

This is 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.

Export Path: Specifies the format and destination data will be exported

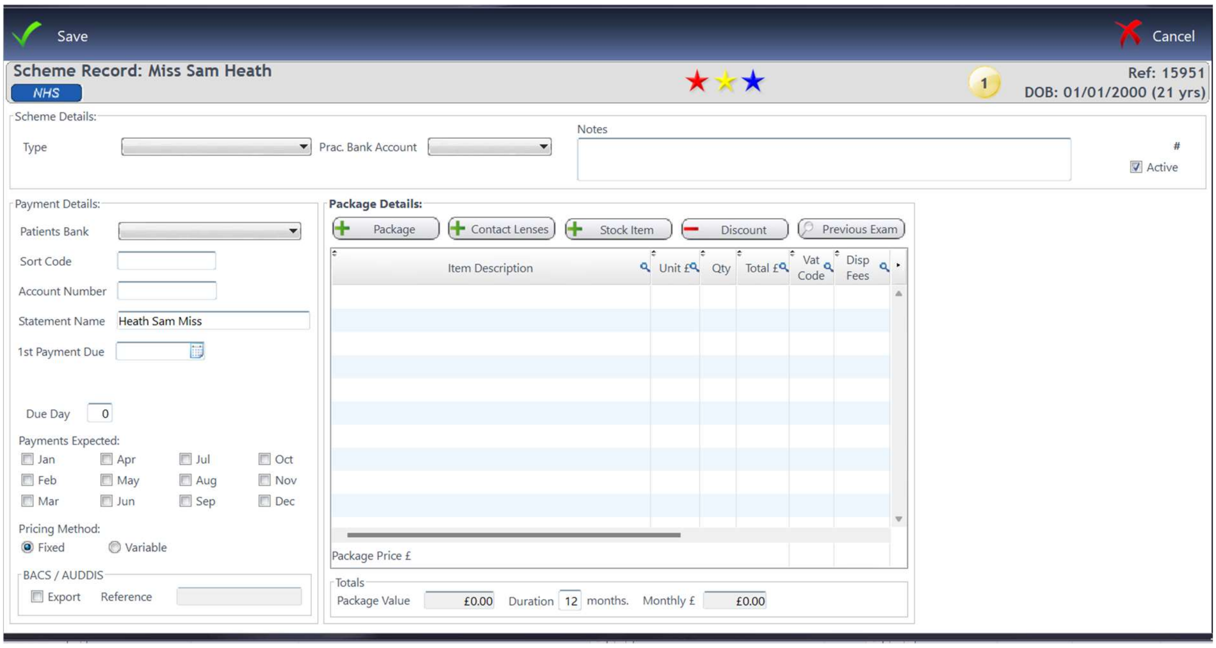
Add a Patient to a Scheme

If a Patient has had their Contact Lens Record put onto the system, they can be put onto a Scheme.

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:

- Select the scheme **type** from the drop down list.
- Select **Prac. Bank Account Notes**
- To the far right of the screen there is a checkbox, this allows the scheme to be marked or un-marked **Active**.

Payment Details:

- Select **Patients Bank** can be chosen from the drop-down.
- Enter **Sort Code** and **Account Number**.
- Enter **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.

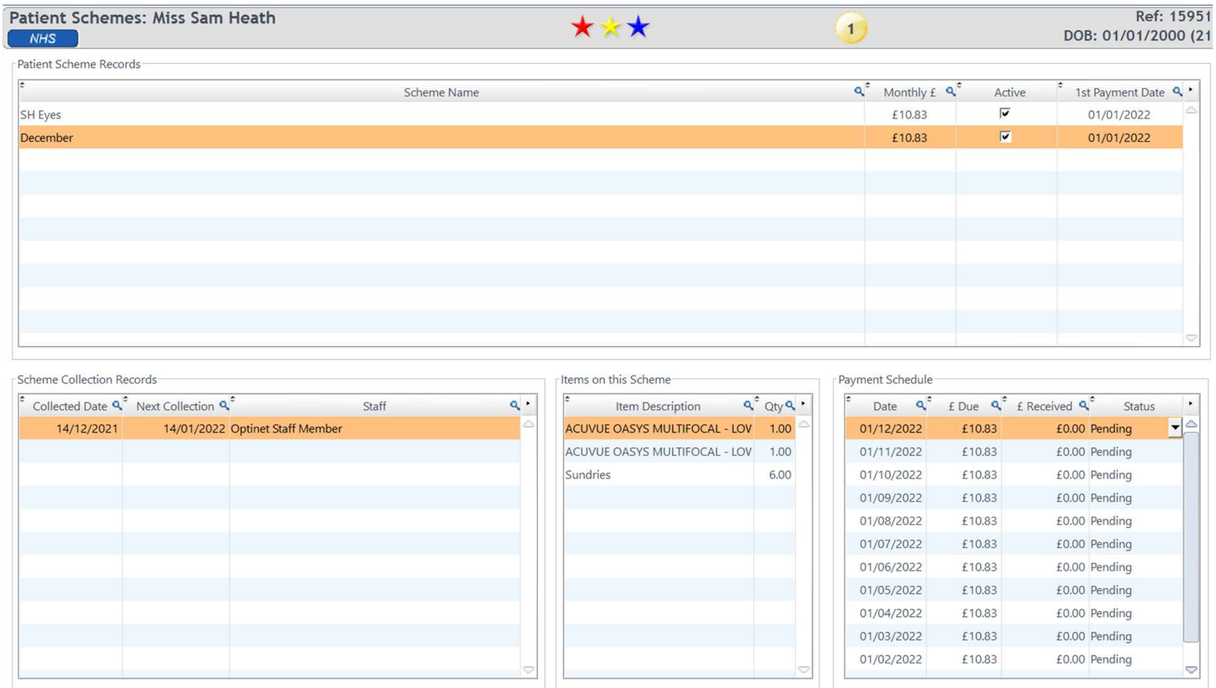
- Right-click on the months within **Payments Expected** to choose a Monthly, Quarterly or Annual payment schedule.

- 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:

- **Package** - opens a list of packages available.
- **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
- **Previous Exam** - Lenses & solutions from the patients last contact lens exam.

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

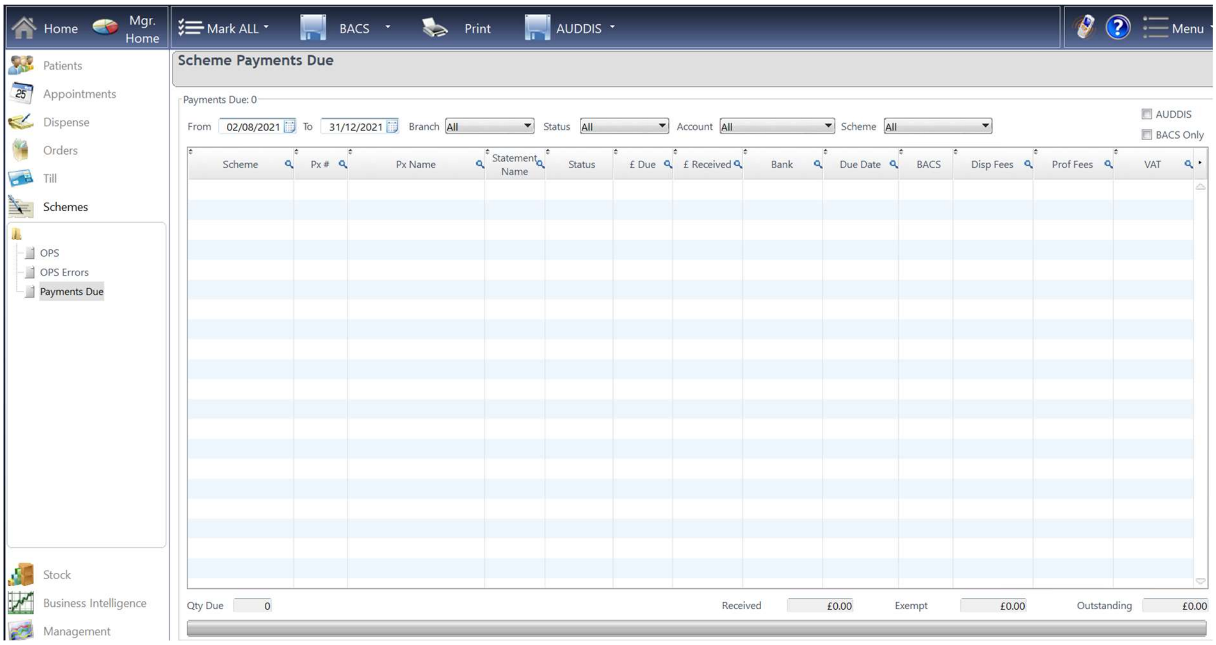


Run / Reconcile Schemes

Once the Schemes have been Setup and Patient assigned, you can manage them in the **Schemes** module of FLEX, shown below.

This is on the left of the screen, within the menu options listed.

- Select Schemes



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 to the far right if you only wish to see **BACS** patients.

As well as the date range, you will can 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 at the top of the screen in the blue bar, 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. **Print** will print out all the records shown on the screen.

- Finally, in Business Intelligence Report, **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).