

# Get the most out of



# Schemes User Guide

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### 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.

Close	🕂 New 🍃 Update	Update Prices Export File
Branch	Setup Schemes	
Staff / Roles	Scheme Types Scheme Packages Banks / Export OPS	 &
Patients	Types	
Examinations	e Description Q	Notes 🔍 Cast Edited 🔍 •
Charminations	SH Eyes	14/12/2021 🚔
Schemes	December	09/12/2021

Press **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.

of Flex™		x
-		
Save		Cancel
Scheme Setu	p	
Scheme Name		
Package	(optional)	
SMS Template	· · · · · · · · · · · · · · · · · · ·	
Letter Template	<b>X</b>	
Notes	Enter a description of the scheme	

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.

Close	🕂 New ۶ Update		E.	Update Prices	Exp Stre	ort File uctures	_	_
Branch	Setup Schemes							
Staff / Roles	Scheme Types Scheme Packages Banks / Export OPS							
Patients	Packages							
Examinations	e e Name Q	Total £ Total Disp Total Fees	Fees Total VAT	# Months	Monthly £	Monthly Disp Fee	Monthly Prof Fee	Monthly , VAT
Schemes	1 2022	£130.00 £35.00	£0.00 £15.84	12	£10.83	£2.92	£0.00	£1.32
	2 SSH Scheme	£315.00 £157.50	£0.00 £26.25	12	£26.25	£13.13	£0.00	£2.19
General								

Press **In New** to create a new Scheme package, or **Update** to amend an existing one. The same window appears, just the amount of information shown.

🖉 Save				🏋 Can
cheme Package				
ackage Detail:		~		
Name FLEX Testing	Contact Lens Price List	heme 🔻		
Contact Lenses	Stock Item	Discount		
Item Description	۹ <sup>°</sup> Qty ۹ <sup>°°</sup> Unit £ ۹ <sup>°°</sup>	Line Total £ 9, <sup>e</sup> Notes	م <sup>¢</sup> Disp Fees ۹ <sup>¢</sup> P	rof Fees <b>Q</b> <sup>e</sup> VAT <b>O</b>
Scheme Items				
ontact Lenses	12 £10.00	£120.00 Contact Lens	£0.00	£0.00 £20.00
ickage Price £		£120.00	£0.00	£0.00 £20.0

- 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.

Save								X Cancel
Scheme Package								
Package Detail: Name SSH Scheme Contact Lenses		Stock Ite	CL Price List Retail m Di	▼] scount		¢ (4	e ¢	
Item Description	Qty Q	Unit £ 9	Line Total £ 9	Notes	٩	Disp Fees 🔍	Prof Fees 🤇	VAT Q .
<ul> <li>Scheme Items</li> <li>Biofinity Multifocal - Dista</li> </ul>	6	£35.00	£210.00 Right Eye			£105.00	£0.00	£17.50
Biofinity Multifocal - Dista	6	£35.00	£210.00 Left Eye			£105.00	£0.00	£17.50
<ul> <li>Discounts</li> </ul>								
CL Schemes	6	£-17.50	£-105.00 Discount			£-52.50	£0.00	£-8.75
Package Price £			£315.00			£157.50	£0.00	£26.25
			Total Pack F	rice £315.00	Duration 12	months	Monthly Price	£26.25

### 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.

nent	t Methods   NHS Vouchers   Sale	es Groups   Dispensing	Fees VAI Dis	counts Pet	ty Cash Groups   Till	Button Ire	e Till Button Layou	Loyalty Plans	Refund Reas
(*ID	9 Possibilition	9 Amount	Borcontago	Activo	Schomo Discount				
1	Discount (f)	Amount 0.00		Active		0			
2	Discount (%)	0.00	V	<b>V</b>	Г				
3	Free Item	100.00	<b>v</b>	ম	Г				
6	CL Schemes	50.00	<b>V</b>	•	<b>v</b>				
_									
						$\bigtriangledown$			

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# Banks / Export Settings

This is an overview of the other functions in the Scheme Setup.

Setu	ap Schemes			
Sch	eme Types Scheme Packages Banks / Export OPS	1		
Ban	ks	Export		
• 1	DQ Name Q ·	Export Path		
9	Alliance & Leicester	BACS Export Method	Default Export	•
6	Barclays	AUDDIS Europet Method	Default Copert	_
13	Bradford & Bingley	AODDIS Export Method	Delault Export	
12	Co-operative Bank	Account Name		
7	HBOS	Reference		
4	HSBC	Sort Code		
8	Lloyds TSB	Account Number		
3	Nationwide			
10	Northern Rock			
2	Practice Direct Debit			
1	Practice Standing Order			
5	Royal Bank of Scotland			
14	Santander			
11	Standard Chartered			

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

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## 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).

🕂 New * 🗳	p Update 🛛 🖄 Message	* 🗞 Print * 🎦 Files	Contact -	eGOS England	🦉 🕐 🚞 Menu *
Miss Sam Heath	i de la companya de l		Orders     Schemes	1	Ref: 15951 DOB: 01/01/2000 (21
Record	Sight Exam	Px Notes Correspondence	Collection		

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 **Prev** (or Update) and a Scheme Record will pop out. This is shown below and every box is explained below the image.

Save			🔀 Cancel
Scheme Record: Miss Sam Heath		***	Ref: 15951 DOB: 01/01/2000 (21 yrs)
Scheme Details: Type	Prac. Bank Account	Notes	# ☑ Active
Payment Details: Patients Bank Sort Code Account Number Statement Name Heath Sam Miss Ist Payment Due Due Day Due Day Due Day Payments Expected: an Apr Jul Oct Feb May Aug Nov Mar Jun Sep Dec Pricing Method: BACS / AUDDIS Export Reference	Package Details: Package Contact Lenses Item Description Item Description Package Price £ Totals Package Value £0.00 Duration	Stock Item     Discount     Previous Exam      Q     Unit £Q     Qty     Total £Q     Vat     Code     Fees         Total £Q     Vat	

#### 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

Previous Exam

- opens up the Lens Wizardadd a stock item to the scheme.
- Stock Item
  Discount
- apply a discount to one or more items on a scheme
- Lenses & solutions from the patients last contact lens exam.

01/08/2022

01/07/2022

01/06/2022

01/05/2022

01/04/2022

01/03/2022

01/02/2022

£10.83

£10.83

£10.83

£10.83

£10.83

£10.83

£10.83

£0.00 Pending

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

Patient Schemes: Miss Sam Heath		***		1		Ref: 15 DOB: 01/01/2000
Patient Scheme Records						
¢ Scher	ne Name			۹ <sup>°</sup> Monthly £	Active	* 1st Payment Date 🔍
SH Eyes				£10.83		01/01/2022
December				£10.83	V	01/01/2022
Scheme Collection Records		Items on this Scheme		Payment Schedule		
<sup>€</sup> Collected Date <b>♀</b> <sup>€</sup> Next Collection <b>♀</b> <sup>€</sup> Staff	٩.	• Item Description	Qty Q ·	• Date 🔍 •	£ Due 🤇 É Re	eceived 🤇 Status
14/12/2021 14/01/2022 Optinet Staff Member		ACUVUE OASYS MULTIFOCAL - LOV	1.00 🗁	01/12/2022	£10.83	£0.00 Pending
		ACUVUE OASYS MULTIFOCAL - LOV	1.00	01/11/2022	£10.83	£0.00 Pending
		Sundries	6.00	01/10/2022	£10.83	£0.00 Pending
				01/09/2022	£10.83	£0.00 Pending

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## 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).