How To Guide for Flokzu Practise Patient Process (Receptionist) - v2

This guide explains how to use Flokzu to manage patient workflows, from account setup to follow-up tasks. It is designed for new users and includes step-by-step instructions, terminology, and FAQs.

Setting Up Your Flokzu Account

To begin using Flokzu, you need to create an account.

- **Step 1**: Visit the Flokzu website and sign up.
- **Step 2**: Choose a password. **Important**: Passwords cannot include the `@` symbol.
- **Step 3**: Log in to access your Flokzu dashboard.

Note: Ensure your account is linked to the correct practice for access to patient workflows.

Working with Patient Processes

This section covers how to manage patient-related tasks in Flokzu, including loading patients, editing information, scheduling surgeries, and coordinating follow-ups.

Loading a New Patient

Use the Create Patient form to add new patients to the system.

When to Use:
Only for new patients, at least **1 day before** their consultation.

Required Fields:
- *Practice Name*
- *Consultation Date*
- *Patient Phone Number*

- Patient Name

All fields marked with an asterisk (*) are mandatory.

What Happens Next:

On the consultation date, two actions occur:

1. A Heidi instance is created to record the consultation.

2. A task appears in the doctor's Flokzu inbox to specify if surgery is required and, if so, the type of surgery.

After the doctor completes this task, Heidi recordings are fetched, and summaries are generated for:

- [Referral Letter Sent to Referring GP](#)
- [Consultation Summary Sent to Patients Not Requiring Surgery](#)

Next Steps:

Check your [Flokzu Inbox](#) to edit patient details or update statuses (e.g., cancellations or no-shows). See [Editing Patient Information](#).

Editing Patient Information

After loading a patient, a task titled **"Edit Patient Information / Update Patient Status"** appears in your [Flokzu Inbox](#).
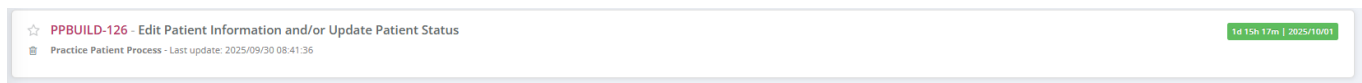
What You Can Do:

- Update all fields except *Practice Name* and *Consultation Date*.
- Mark a patient as cancelled or a no-show (see [What If a Patient Cancels or Does Not Show?](#))

Deadline:

A timer on the right shows the task's due date (set for the day after the consultation). Complete it before it closes, or you'll lose the ability to edit.

Tip:

Do not complete this task until after the patient's consultation, as this task also allows you to

update statuses like cancellations.

Note: If you select `Patient Information Updated`, `Both`, or `Patient Status Updated`, a new task is created in your inbox to view patient details as needed **"Review Patient Information"** as shown below.

Note: You can keep this task active / open for as long as you want; this will not hold up any processes.
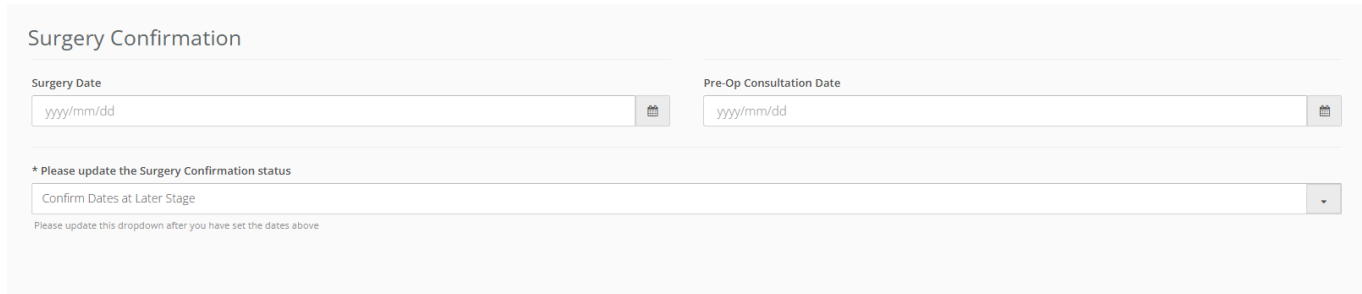
Scheduling Surgery and Pre-Op Dates

On the consultation date, a task titled **"Coordinate Surgery and Pre-Op Dates (Day of Consultation)"** appears in your inbox with a countdown timer.

Key Actions:
- Select surgery and pre-op dates.

- Update the *Please update the Surgery Confirmation status* field (only editable after dates are set).

Surgery Confirmation

Surgery Date

yyyy/mm/dd 📅

Pre-Op Consultation Date

yyyy/mm/dd 📅

* Please update the Surgery Confirmation status

Confirm Dates at Later Stage ▾

Please update this dropdown after you have set the dates above

Important Notes:
- If the doctor indicates no surgery is needed, this task is removed from your inbox.
- If you do not complete this task or forget to update the field *Please update the Surgery Confirmation status*, a similar task reappears later as **Coordinate Surgery and Pre-Op Dates** (see How Does "Coordinate Surgery and Pre-Op Dates (Day of Consultation)" Differ from "Coordinate Surgery and Pre-Op Dates"?)
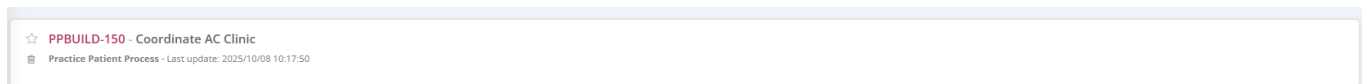
Warning:

Failure to complete the tasks **"Coordinate Surgery and Pre-Op Dates (Day of Consultation)"** or **"Coordinate Surgery and Pre-Op Dates"** promptly (especially for surgeries scheduled within a week) delays patient communications and pre-op tasks.

What Happens Next:

Patient communications are sent, including the Pre-Op Form Link Sent to Patient.
Heidi instances are created for pre-op and surgery dates.

Assigning an Anesthetists Clinic (If Applicable)

After the pre-op consultation, a task titled **"Coordinate AC Clinic"** appears in your inbox.

☆ **PPBUILD-150 - Coordinate AC Clinic**
🗑 **Practice Patient Process** - Last update: 2025/10/08 10:17:50

What You Can Do:
- Review patient details.
- Assign an Anesthetists Clinic (AC) if needed.
If `AC Clinic Assigned` is selected, a communication is sent to the clinic (see Pre-Op Consultation Summary and AC Form Link Sent to AC Clinic (If Assigned))

Tip: Remember to use 'Dr' abbreviation if and when appropriate

Feedback Request: Let us know if additional patient information would be helpful in this task.

Managing Follow-Up Calls

You'll receive tasks titled **"-- Follow Up Call"** at various stages to check on patients.

What You Can Do:
- Review patient details.
- Use the *-- Follow Up Message Form Identifier* field to locate patient-submitted feedback via the Follow-Up Messages Form Links Sent to Patient in the Dr -- Follow Up Message Forms custom report.

Note: Multiple follow-up tasks may appear if a patient submits multiple forms between calls.

Follow Up Messages

Day 6: Follow Up Message Form Identifier

Day 7: Follow Up Message Form Identifier

Day 8: Follow Up Message Form Identifier

Day 9: Follow Up Message Form Identifier

Day 10: Follow Up Message Form Identifier

Coordinating Follow-Up Consultations

At 6 weeks, 6 months, 1 year, and 2 years post-discharge, a task titled **"Coordinate --- Post-Op Consultation"** appears in your inbox.

☆ PPBUILD-151 - Coordinate 6-months Post-Op Consultation
🗑 **Practice Patient Process** - Last update: 2025/10/08 11:40:44

Key Actions:
- Check the **Post Operative Forms** section, if identifier field is blank please remind the patient to complete the form (mandatory at 6 weeks).
- Select a consultation date if a post-op consultation is required.

* Week 6: Post-Op Call Notes

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Post Operative Forms

6 Weeks: Post-Op Form Identifier

Post Op Consultations

* 6 Weeks Post Op Consultation Date

yyyy/mm/dd   📅

Communications Sent to Patients and Providers

This section lists the communications sent to patients, referring doctors, physiotherapists, and nurses.

Referral Letter Sent to Referring GP

A letter with an AI-generated summary from the Heidi consultation recording is sent to the referring GP.

Consultation Summary Sent to Patients Not Requiring Surgery

Patients not requiring surgery receive a summary with an AI-generated report from the Heidi consultation recording.

Pre-Op Form Link Sent to Patient

Patients receive a pre-op form link specific to their procedure type before the pre-op consultation.

[Example Ankle Procedure Pre-Op](#)
[Example Foot Procedure Pre-Op](#)
[Example Other Procedure Pre-Op](#)
[Example Knee Replacement Procedure Pre-Op](#)
[Example Hip Replacement Procedure Pre-Op](#)

Pre-Op Consultation Summary and AC Form Link Sent to AC Clinic (If Assigned)

If an Anesthetists Clinic is assigned, they receive a summary with an AI-generated report from the Heidi pre-op consultation recording and an AC form link.

[Example AC Form](#)

Post-Op Physio Update / Instructions and Physio Form Link Sent to Physiotherapist

Physiotherapists receive instructions with an AI-generated summary from the Heidi surgery recording and a post-op physio form link.

[Example Post-Operative Physio Form](#)

Move <app@flokzu.com>
to me ▾

12:44 (2 minutes ago)

Dear Physiotherapy Team,

Please find below the post-operative physiotherapy instructions and initial update for your patient:

Patient Name: Patient Surname, Patient Name
Date of Birth: 0001/01/01
Procedure Date: 2025/10/02

These instructions have been developed to guide the initial phase of rehabilitation. We recommend reviewing them prior to the patient's first session to align our treatment goals.

Action Required: To facilitate a coordinated approach to care, please complete the required physiotherapy assessment form via the link below after your initial evaluation. This will provide us with valuable feedback on the patient's progress.

Post Operative Physio Form

Your expertise is a crucial component of this patient's recovery. Thank you for your partnership in their care. Please do not hesitate to contact our office if you have any questions regarding these instructions.

Best regards,
The Team at Test Practise Name
Move Orthopeadics

Post-Operative Nursing Instructions Sent to Nurse

Nurses receive instructions with an AI-generated summary from the Heidi surgery recording.

Move <app@flokzu.com>   Unsubscribe
to me ▾

19:39 (4 minutes ago)

Dear Nursing Team,

Please find below the detailed post-operative instructions for the following patient under your care:

Patient Name: Patient Name Patient Surname
Date of Birth: 0001/01/01

These instructions have been specifically tailored for this patient's procedure and recovery plan. Your careful review and adherence to these protocols are essential for ensuring optimal patient outcomes.

Post-Operative Nursing Instructions

Thank you for your diligence and expert care in implementing these instructions. Your role is vital to the patient's recovery journey.

Should you have any questions or require any clarification, please do not hesitate to contact us.

Respectfully,
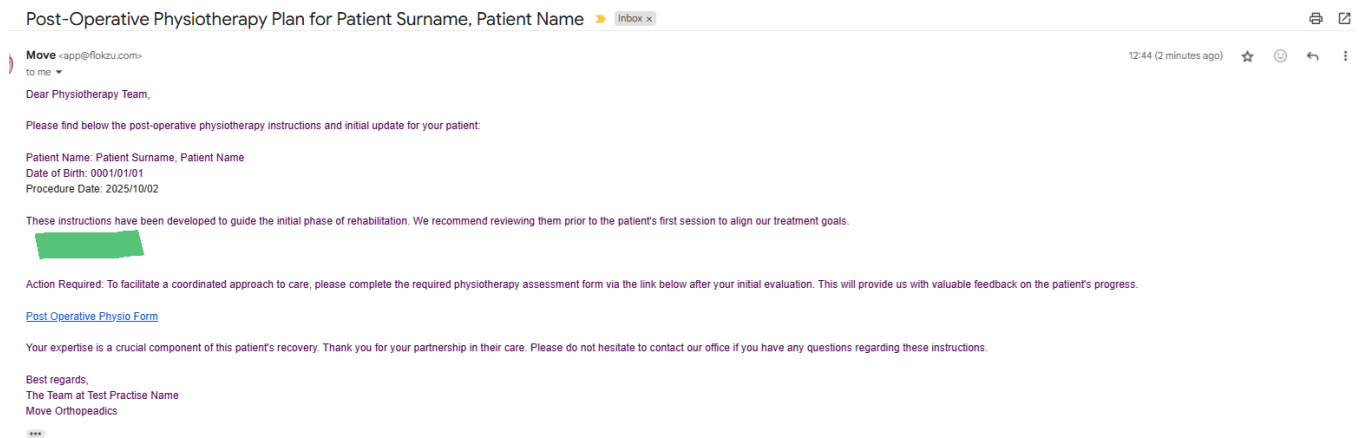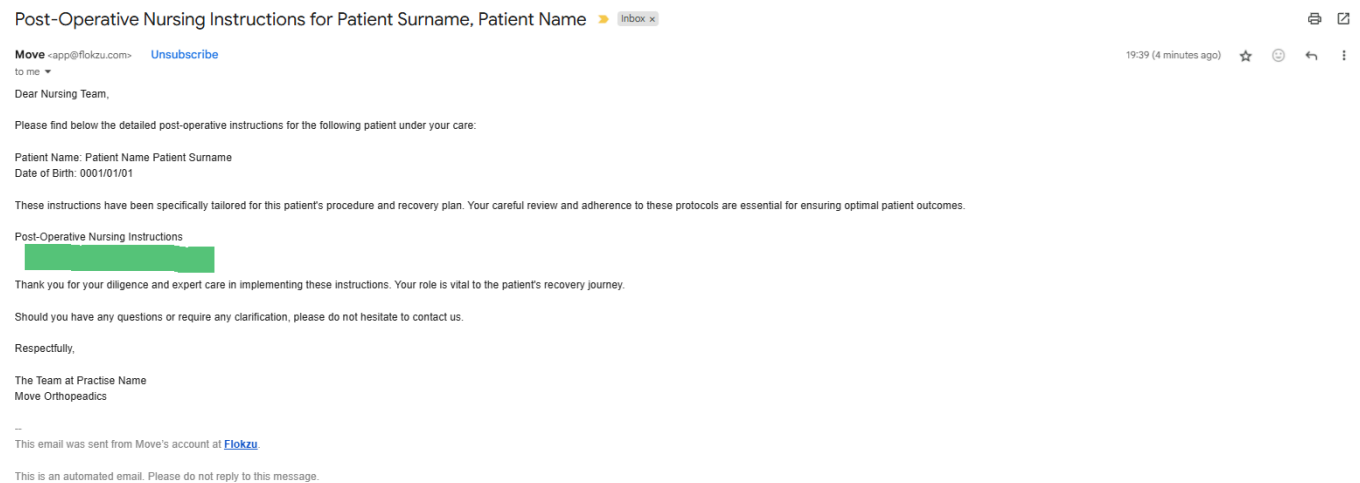
The Team at Practise Name
Move Orthopeadics

--
This email was sent from Move's account at Flokzu.

This is an automated email. Please do not reply to this message.

Surgery Summary Sent to Patient

Patients receive a summary with an AI-generated report from the Heidi surgery recording.

SOS Message Sent to Patient

directly after discharge

Follow Up Messages Form Links Sent to Patient

Patients receive a form link for submitting post-op feedback, which can be viewed in the Dr -- Follow Up Message Forms custom report.

Example Follow Up Message Form

Move <app@flokzu.com>
to me ▼

Hello Patient Name,

Swelling may peak today, and you might notice bruising beginning to appear near the incision or along the toes. This is a normal part of healing. Keep your dressing dry, continue strict elevation, and avoid letting the leg hang down for long periods.

Please complete the following form to give us a better indication of your current healing process:
Day 2 Check-In Form

Regards,
The Team at Test Practise Name
Move Orthopeadics

NOTE: body of email (and whatsapp) will differ depending on day and procedure as shown here

Move <app@flokzu.com>
to me ▼

Hello Patient Name,

Swelling may be at its peak today, and bruising can become more visible. This is part of your body's natural healing process. If discomfort feels a little more noticeable, that's normal at this stage — keep up with icing, elevation, and any gentle movement your care team has approved.

Please complete the following form to give us a better indication of your current healing process:
Day 3 Check-In Form

Regards,
The Team at Test Practise Name
Move Orthopeadics

Post Op Form Links Sent to Patient

Patients receive follow-up form links at 6 weeks, 6 months, 1 year, and 2 years post-discharge for post-op consultations.

[Example 6 Weeks Post Op Form](#)

Move <app@flokzu.com>   Unsubscribe
to me ▼

Hello Patient Name,

It has been 6 weeks since your surgery with us.
There are some questions we would like for your to answer
Please follow the link provided 6-week Post-Op Form
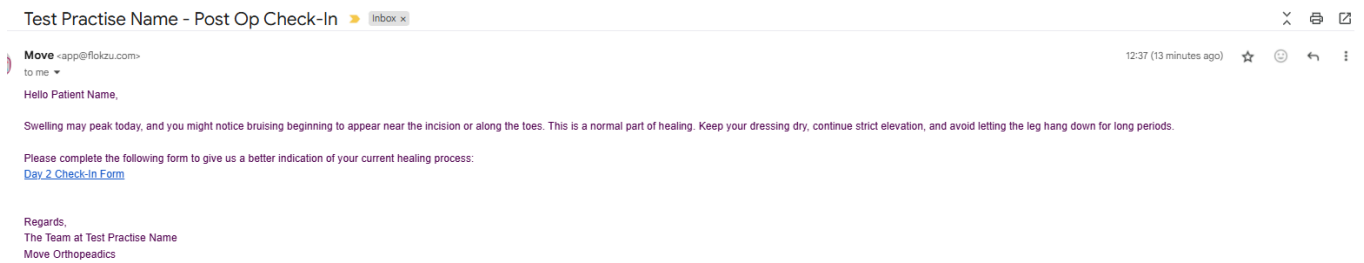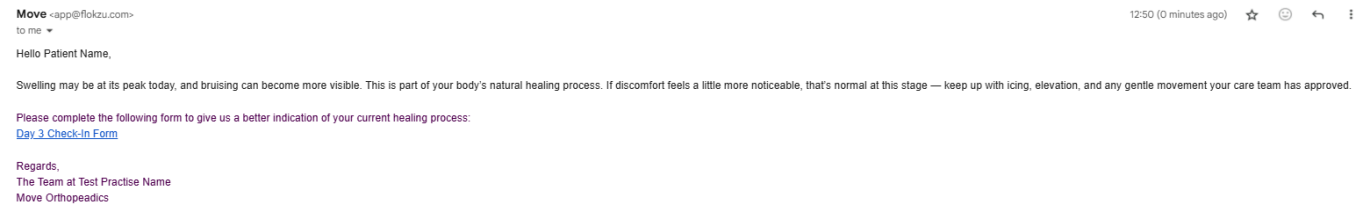
Thank You

Regards,
The Team at Test Practise Name
Move Orthopeadics

--
This email was sent from Move's account at **Flokzu**.

This is an automated email. Please do not reply to this message.

[Example 6 Months Post Op Form](#)
[Example 1 Year Post Op Form](#)
[Example 2 Years Post Op Form](#)

Using Custom Reports

Dr -- Follow Up Message Forms

Identifier	Name & Surname	Procedure	Period	Practise Patient Process ID
ⓘ				

There is no data to show

Average Pain Levels

∞

FAQ

What If a Patient Cancels or Does Not Show?

In the **"Edit Patient Information / Update Patient Status"** task in your [Flokzu Inbox](#), select *Update Patient Status* from the dropdown to mark a patient as cancelled or a no-show.

How Does "Coordinate Surgery and Pre-Op Dates (Day of Consultation)" Differ from "Coordinate Surgery and Pre-Op Dates"?

"Coordinate Surgery and Pre-Op Dates (Day of Consultation)":
- Appears on the consultation date with a 1-day deadline.
- If not completed, it disappears, and the **"Coordinate Surgery and Pre-Op Dates"** task appears later (after the doctor's consultation task).

"Coordinate Surgery and Pre-Op Dates":
- Can be completed without setting dates, reappearing in 2 days as a reminder (this interval can be adjusted, e.g., to 5 days).
- Options in the task include `Task Done` or `Date(s) Have Passed`. Selecting the latter ends the workflow.