

How to Guide for Flokzu Practise Patient Process - Coordinate 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.

The screenshot shows a task interface for 'PPBUILD-136 - Coordinate Surgery and Pre-Op Dates (Day of Consultation)'. At the top, there is a star icon, the task title, and a green countdown timer showing '1d 5h 34m | 2025/10/03'. Below the title, it says 'Practice Patient Process - Last update: 2025/10/02 18:25:09'. The main section is titled 'Surgery Confirmation'. It contains two date input fields: 'Surgery Date' and 'Pre-Op Consultation Date', both with a placeholder 'yyyy/mm/dd' and a calendar icon. Below these fields, there is a section titled '* Please update the Surgery Confirmation status'. It features a dropdown menu currently set to 'Confirm Dates at Later Stage'. Below the dropdown is a search bar with a magnifying glass icon. Under the search bar, there is a list of options: 'Dates Confirmed' and 'Dates Confirmed - Urgent (<7 days)'. The 'Dates Confirmed - Urgent (<7 days)' option is highlighted with a purple background. At the bottom of the task area, there is a 'Task done' button and a chat icon.

Key Actions:

- Select surgery and pre-op dates.
- Update the *Please update the Surgery Confirmation status* field (since can only be changed after dates are set, otherwise jumps back to Confirm Dates ad Later Stage).

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* to Dates Confirmed or Dates Confirmed – Urgent , a similar task reappears later as **Coordinate Surgery and Pre-Op Dates** (2 days after doctor has completed this Consultation and Review Consultation tasks)

☆ PPBUILD-179 - Coordinate Surgery and Pre-Op Dates
Practice Patient Process - Last update: 2025/10/15 11:51:25

Surgery Confirmation

Surgery Date
2025/09/27

Pre-Op Consultation Date
2025/10/01

* Please update the Surgery Confirmation status

Confirm Dates at Later Stage

-
Dates Confirmed
Dates Confirmed - Urgent (<7 days)
Confirm Dates at Later Stage

Task done
Date(s) have Passed

Key Actions:

- Select surgery and pre-op dates.
- Update the *Please update the Surgery Confirmation status* field (since can only be changed after dates are set, otherwise jumps back to Confirm Dates ad Later Stage).
alternatively
- make use of *Date(s) have Passed* which allows you to exit the flow if patients loaded at start of Flokzu launch has already passed this point in process.

Important Note:

If you forget to update the field *Please update the Surgery Confirmation status* to Dates Confirmed or Dates Confirmed – Urgent then this task will reappear in your inbox in 2 days.

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 rest of process because only after these dates are set do pre-op forms get sent out and will the Pre-Op Consultation, Assigning AC Clinic & Physiotherapist and Surgery tasks be created.

Important Note

the **"Coordinate Surgery and Pre-Op Dates (Day of Consultation)"** will only appear for new patients loaded onto Flokzu

for the previous patients you will be see the **"Coordinate Surgery and Pre-Op Dates"** task in your inbox

End of Document

Last Updated: 20 November 2025