How To Guide for Flokzu Practise Patient Process (Receptionist)

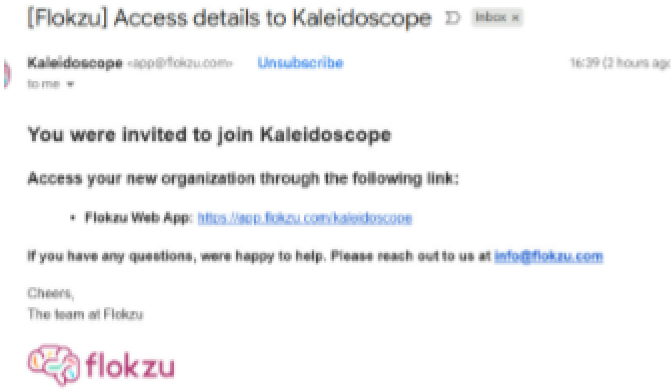
This guide explains how to use Flokzu to manage patient workflows, from account setup to follow-up tasks. It is designed for new users and includes step-by-step instructions, terminology, and FAQs.

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.


[Flokzu] Access details to Kaleidoscope

Kaleidoscope <app@flokzu.com> Unsubscribe

to me

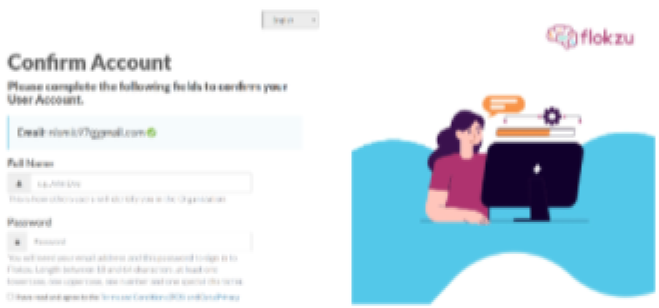
You were invited to join Kaleidoscope

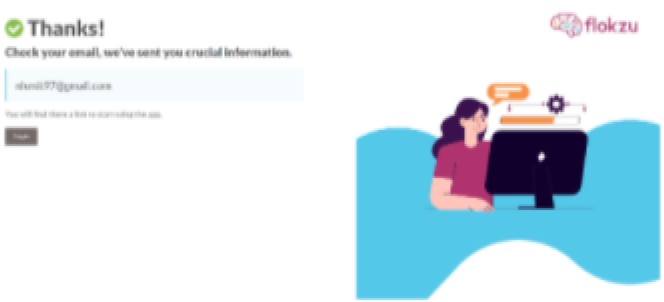
Access your new organization through the following link:

- **Flokzu Web App:** https://app.flokzu.com/kaleidoscope

If you have any questions, were happy to help. Please reach out to us at info@flokzu.com

Cheers,
The team at Flokzu





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.

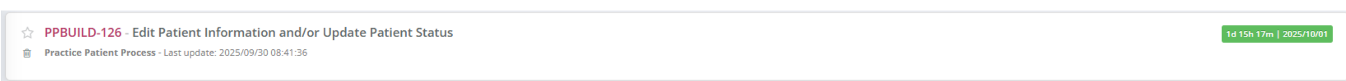
What Happens Next:
On the consultation date, two actions occur:
1. A Heidi instance is created to record the consultation.
2. A task appears in the doctor's Flokzu inbox to specify if surgery is required and, if so, the type of surgery.

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.

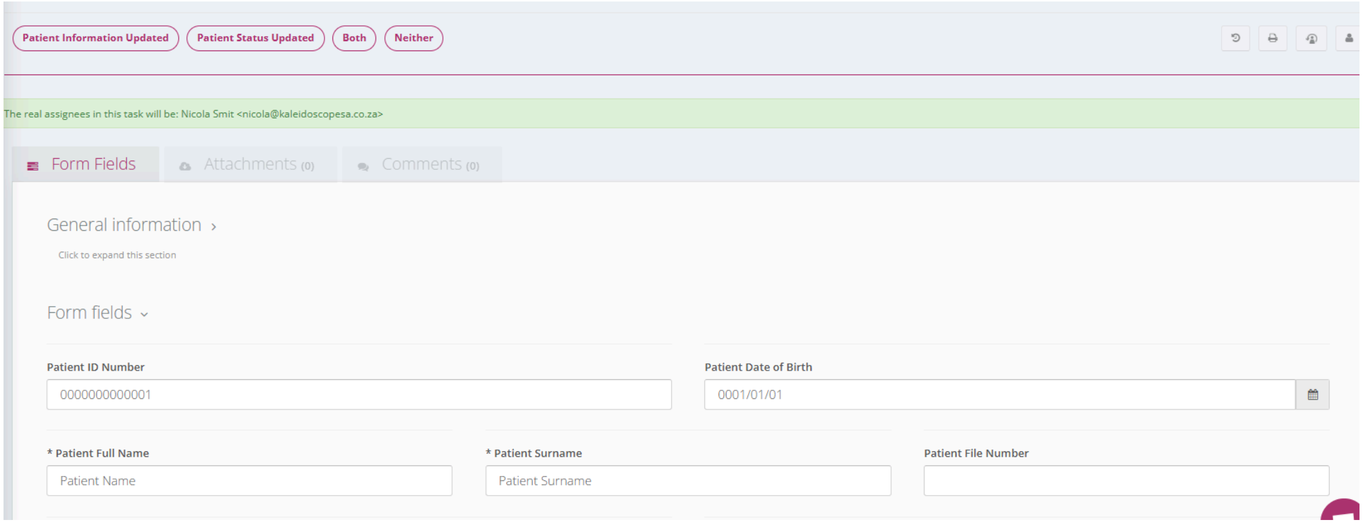


What You Can Do:
- Update all fields except *Practice Name* and *Consultation Date*.
- Mark a patient as cancelled or a no-show (see What If a Patient Cancels or Does Not Show?)

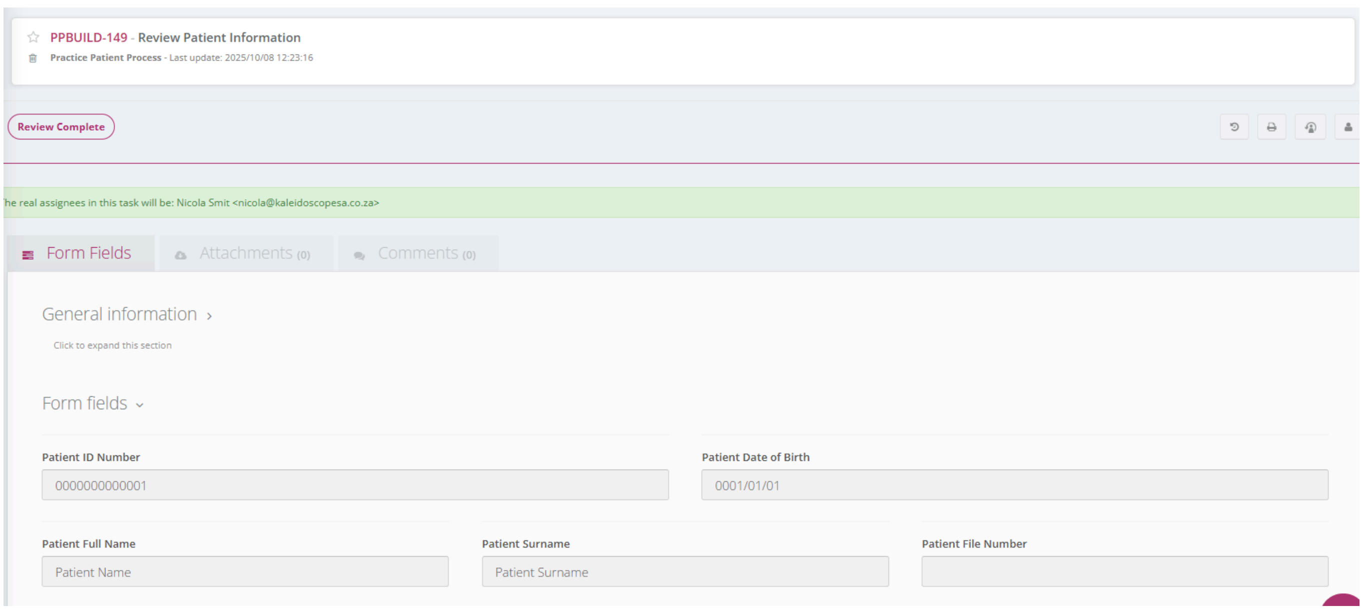
Deadline:
A timer on the right shows the task’s due date (set for the day after the consultation). Complete it before it closes, or you’ll lose the ability to edit.

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

update statuses like cancellations.



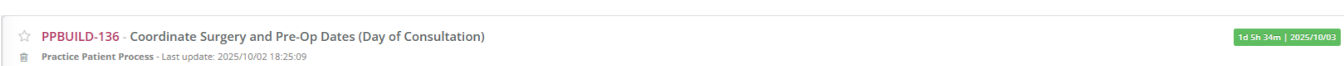
Note: If you select *"Patient Information Updated", "Both", or "Patient Status Updated"*, a new task is created in your inbox to view patient details as needed "Review Patient Information" as shown below.



Note: You can keep this task active / open for as long as you want; this will not hold up any processes.

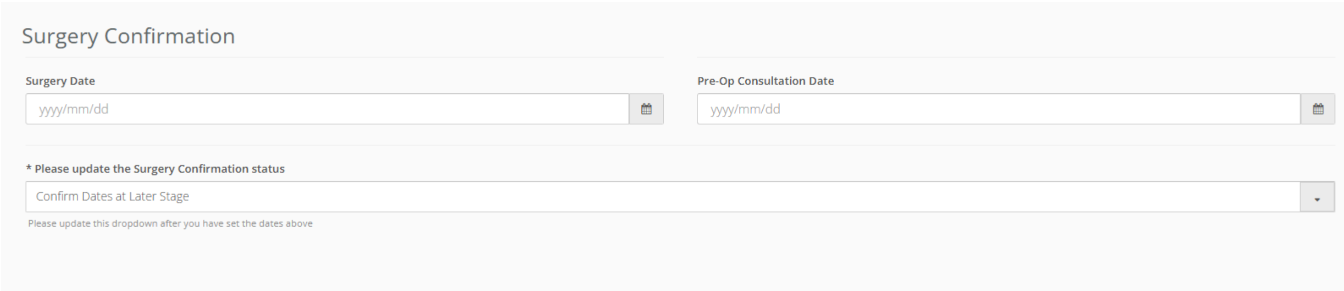
Scheduling Surgery and Pre-Op Dates

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).



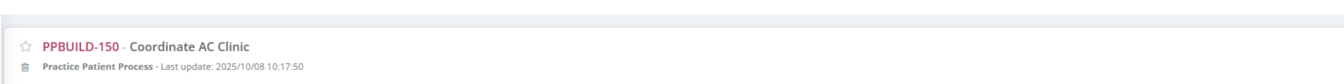
Important Notes:
- If the doctor indicates no surgery is needed, this task is removed from your inbox.
- If you do not complete this task or forget to update the field *Please update the Surgery Confirmation status*, a similar task reappears later as **Coordinate Surgery and Pre-Op Dates** (see How Does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

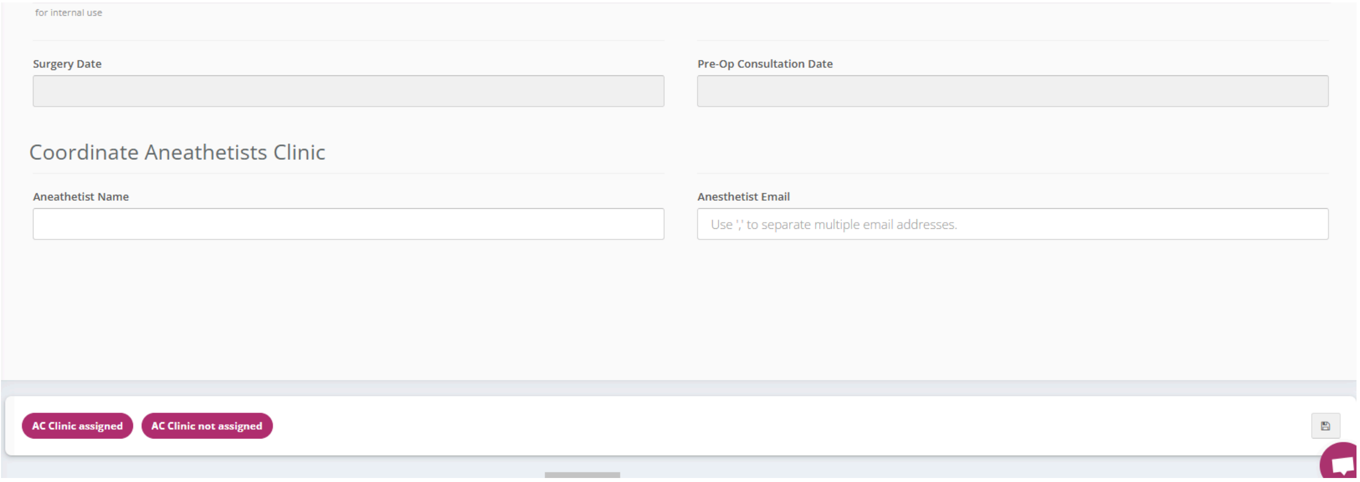
What Happens Next:
Patient communications are sent, including the Pre-Op Form Link Sent to Patient.
Heidi instances are created for pre-op and surgery dates.
Summaries are generated for:
- Pre-Op Consultation Summary and AC Form Link Sent to AC Clinic (If Assigned)
- Post-Op Physio Update / Instructions and Physio Form Link Sent to Physiotherapist
- Post-Operative Nursing Instructions Sent to Nurse
- Surgery Summary Sent to Patient

Assigning an Anesthetists Clinic (If Applicable)

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



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)).

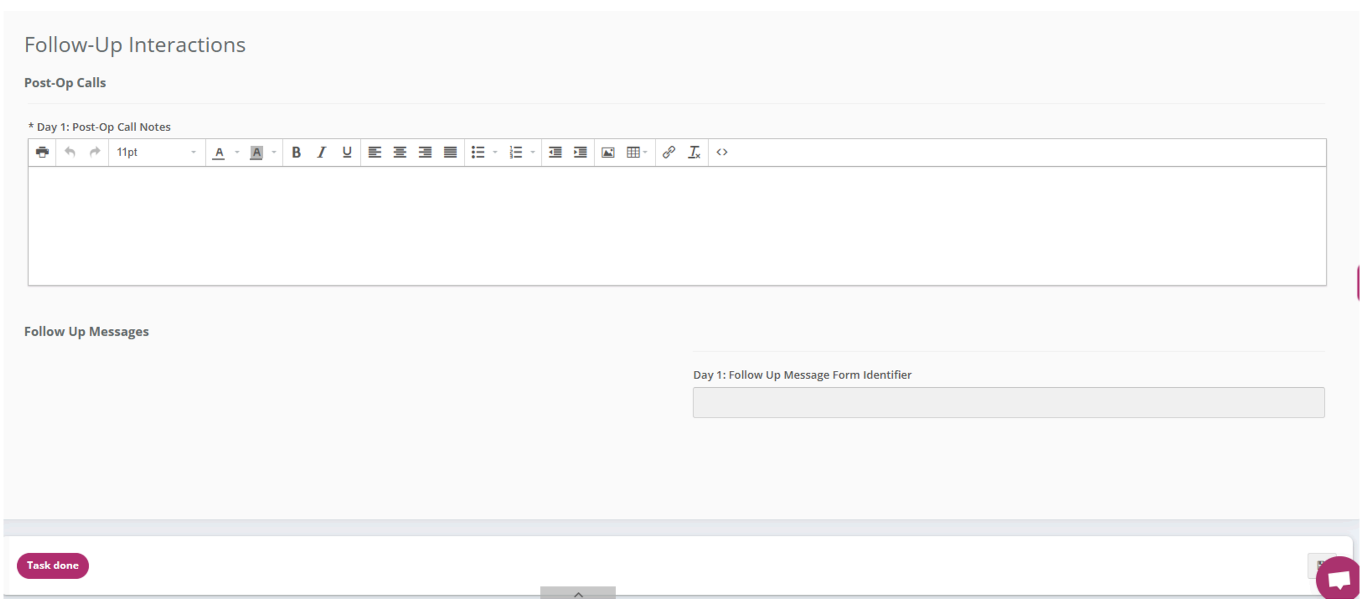


Feedback: Let us know if additional patient information would be helpful in this task.

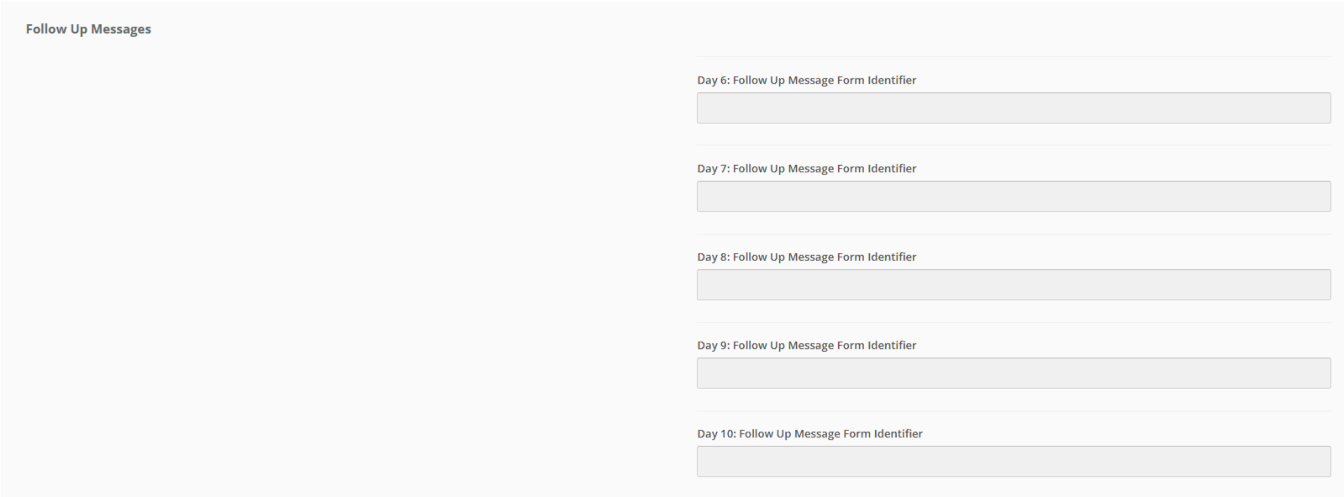
Managing Follow-Up Calls

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.

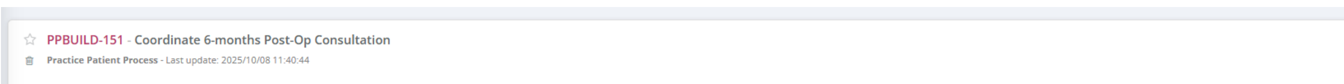


Note: Multiple follow-up tasks may appear if a patient submits multiple forms between calls.

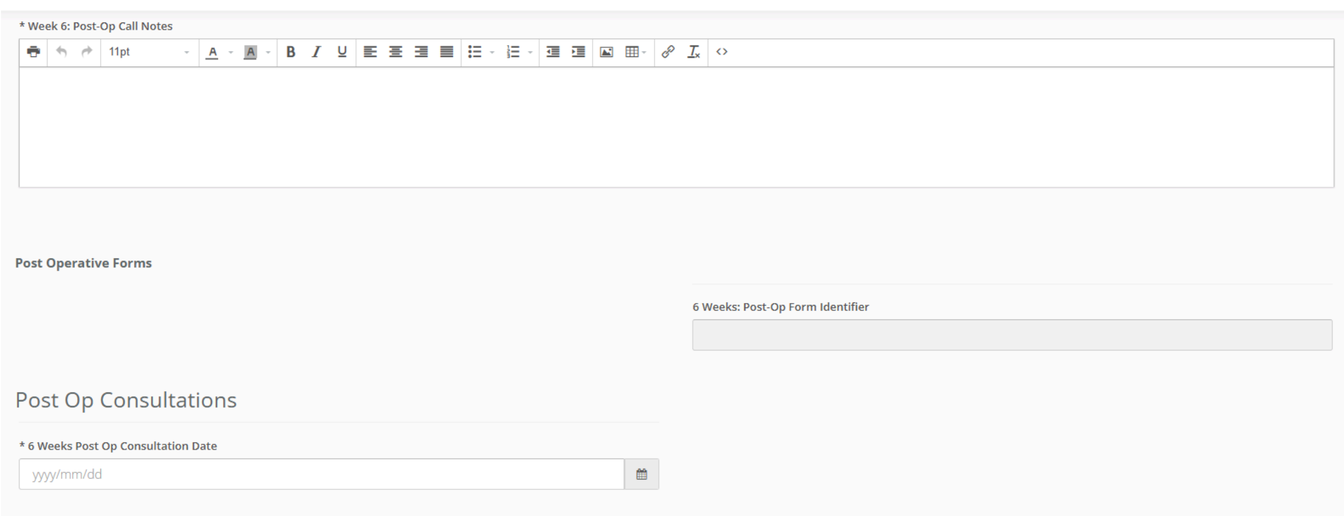


Coordinating Follow-Up Consultations

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



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.

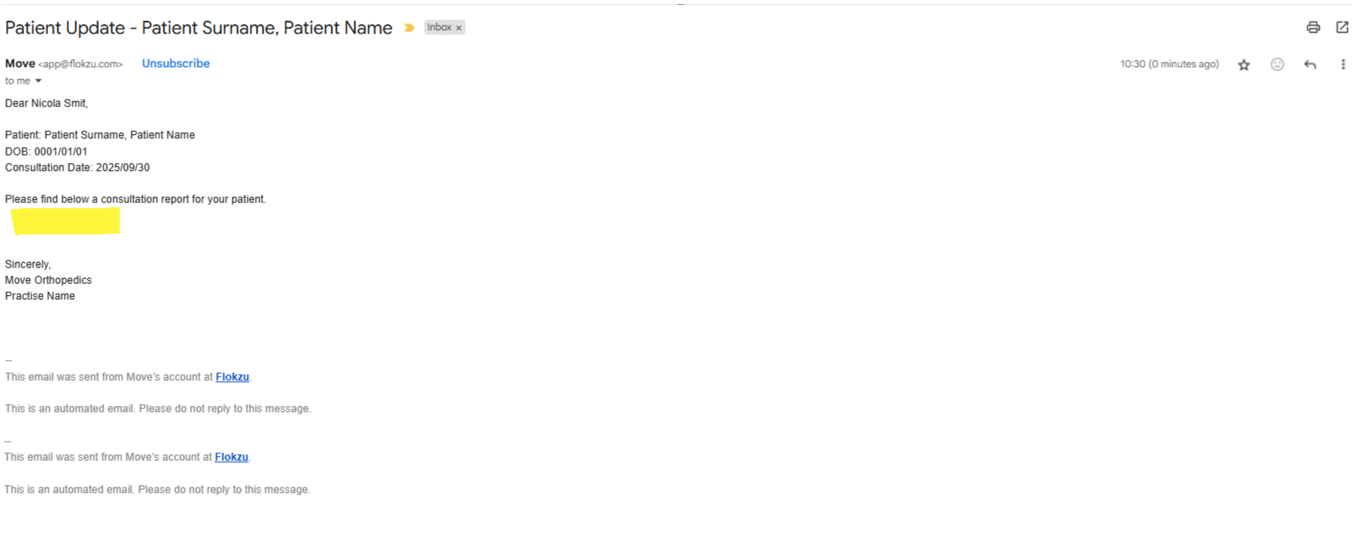


Communications Sent to Patients and Providers

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.



Patient Update - Patient Surname, Patient Name Inbox ×

Move <app@flokzu.com> Unsubscribe 10:30 (0 minutes ago)

to me

Dear Nicola Smit,

Patient: Patient Surname, Patient Name
DOB: 0001/01/01
Consultation Date: 2025/09/30

Please find below a consultation report for your patient.

Sincerely,
Move Orthopedics
Practise Name

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

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

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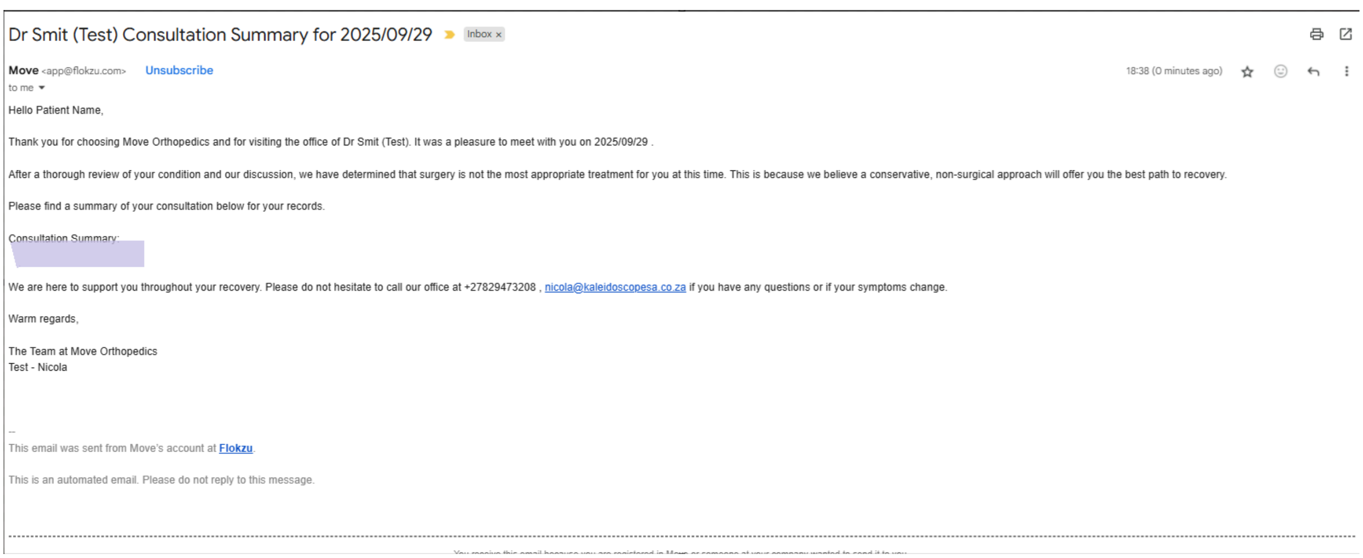
Consultation Summary Sent to Patients Not Requiring Surgery

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



Dr Smit (Test) Consultation Summary for 2025/09/29 Inbox ×

Move <app@flokzu.com> Unsubscribe 18:38 (0 minutes ago)

to me

Hello Patient Name,

Thank you for choosing Move Orthopedics and for visiting the office of Dr Smit (Test). It was a pleasure to meet with you on 2025/09/29 .

After a thorough review of your condition and our discussion, we have determined that surgery is not the most appropriate treatment for you at this time. This is because we believe a conservative, non-surgical approach will offer you the best path to recovery.

Please find a summary of your consultation below for your records.

Consultation Summary:

We are here to support you throughout your recovery. Please do not hesitate to call our office at +27829473208 , nicola@kaleidoscopesa.co.za if you have any questions or if your symptoms change.

Warm regards,

The Team at Move Orthopedics
Test - Nicola

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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

Test Practise Name Pre-Op Form for Procedure on 2025/10/02 Inbox ×

Move <app@flokzu.com> Unsubscribe 11:35 (0 minutes ago)
to me

Hello Patient Name,

We are looking forward to caring for you on your upcoming surgery on 2025/10/02.

To ensure we are fully prepared for your procedure, please complete your pre-operative and consent forms your earliest convenience. We kindly ask that you submit it at least 48 hours before your surgery.

Here's what you need to do:

Click here to complete your Pre-Op Form .

The form should only take about 5-10 minutes to complete.

Completing this form ahead of time helps our team personalize your care and makes your check-in process on surgery day smoother and faster.

We're here to help!
If you have any questions or trouble with the form, please don't hesitate to reach out to our team. We're happy to assist you.

Email: nicola@kaleidoscopesa.co.za

Call us: +27829473208

Thank you for helping us prepare for your visit. We are committed to making your experience as comfortable as possible.

See you soon,
The Team at Test Practise Name
Move Orthopeadics

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

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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

Practise Name Pre-Op Summary and AC Form Request for Patient Name Patient Surname Inbox ×

Move <app@flokzu.com> Unsubscribe 19:01 (0 minutes ago)
to me

Dear Dr. {{Assigned Anaesthetist}},

We are writing to request your completion of Anaesthetic Form for Patient Name Patient Surname, who is scheduled for an upcoming procedure.

The form can be accessed via the link here AC Form
and should be completed on the day of Patient Name Patient Surname visit to your practise.

Your prompt attention to this matter is greatly appreciated, as it is essential for ensuring all pre-operative protocols are completed and anaesthetic plans are confirmed in advance of the procedure.

For your reference, the pre-operative consultation summary is provided below:

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

Thank you for your cooperation.

Sincerely,
The Team at Practise Name
Move Orthopeadics

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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]()

Post-Operative Physiotherapy Plan for Patient Surname, Patient Name Inbox ×

Move <app@flokzu.com> Unsubscribe 19:39 (2 minutes ago)
to me

Dear Physiotherapy Team,

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

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

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.

Post-Operative Physiotherapy Instructions / Update:

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 Practise Name
Move Orthopeadics

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

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Post-Operative Nursing Instructions Sent to Nurse

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

Post-Operative Nursing Instructions for Patient Surname, Patient Name Inbox ×

Move <app@flokzu.com> Unsubscribe 19:39 (4 minutes ago)
to me

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

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Surgery Summary Sent to Patient

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

Practise Name Surgery Summary from

Move <app@flokzu.com> Unsubscribe

19:29 (0 minutes ago)

to me

Dear Patient Name,

Now that some time has passed since your procedure on , we hope your recovery is progressing well.

At Practise Name, we are consistently striving to improve the care and experience we provide to our patients. An important part of that process is listening to feedback from individuals like you.

We have carefully reviewed the notes and feedback from your surgical team regarding your procedure.

A summary of that feedback is provided below:
[redacted]

Our team values this reflective process immensely, as it is fundamental to maintaining our high standards of care and safety.

Please remember that our team is here to support you throughout your recovery. If you have any questions or concerns at all, please do not hesitate to reach out to us.

We thank you for trusting us with your care.

Warmly,
The Team at Practise Name
Move Orthopeadics

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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 Check-In Message Form

Practise Name Post Op Check-In Inbox

Move <app@flokzu.com> Unsubscribe

19:07 (4 minutes ago)

to me

Hello Patient Name,

Today is about rest and letting your body recover from the operation. Some swelling, stiffness, and discomfort are expected. Keep the area elevated above heart level, ice regularly, and follow any movement or weight-bearing instructions you were given. Combining pain relief with rest and swelling control will make a big difference.

Please complete the following form to give us a better indication of your current healing process:
Day 1 Form

Regards,
The Team at Practise Name
Move Ortopeadics

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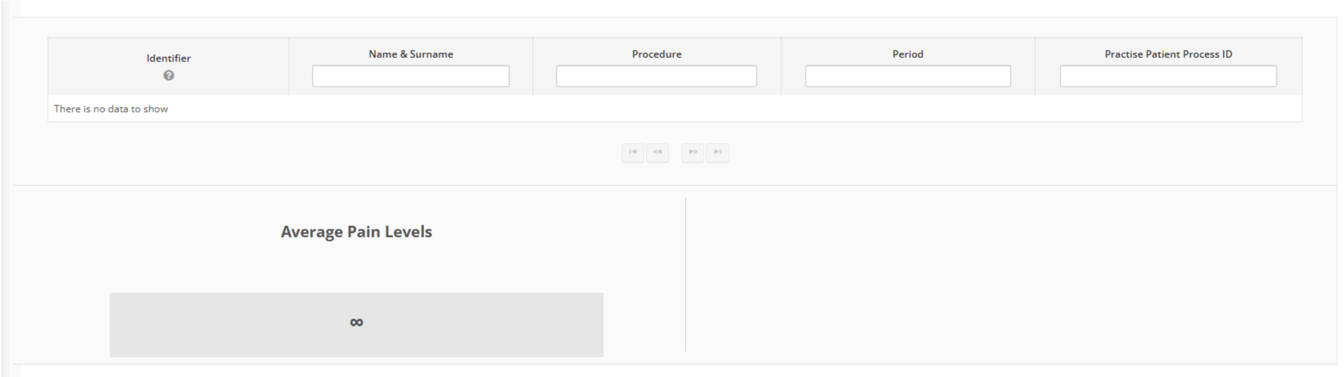
Post Op Form Links Sent to Patient

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
- Example 6 Months Post Op Form
- Example 1 Year Post Op Form
- Example 2 Years Post Op Form

Using Custom Reports

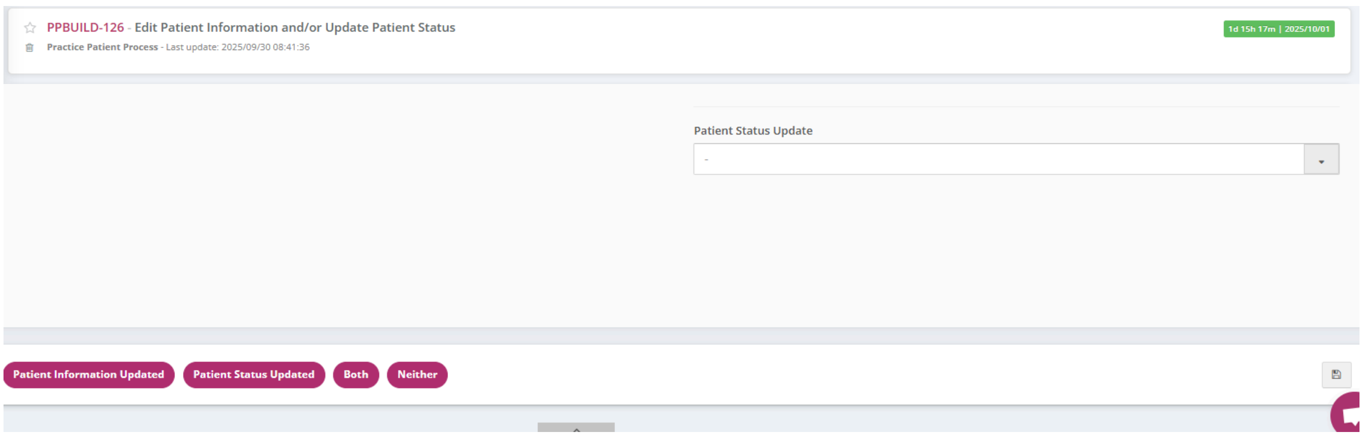
Dr -- Follow Up Message Forms



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.