

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.

[Flokzu] Access details to Kaleidoscope  

 **Kaleidoscope** <app@flokzu.com> [Unsubscribe](#) 16:39 (2 hours ago)
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, we're happy to help. Please reach out to us at info@flokzu.com

Cheers,
The team at Flokzu







Confirm Account
Please complete the following fields to confirm your User Account.

Email: stent17@gmail.com

Full Name:


Password:



 **Thanks!**
Check your email, we've sent you crucial information.

stent17@gmail.com

You will find there a link to confirm the app.



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:

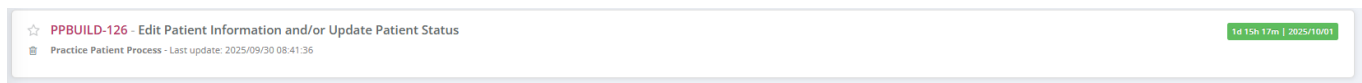
- [Referral Letter Sent to Referring GP](#)
- [Consultation Summary Sent to Patients Not Requiring Surgery](#)

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.

The screenshot shows a web interface for updating patient information. At the top, there are four buttons: "Patient Information Updated", "Patient Status Updated", "Both", and "Neither". Below these is a green banner with the text "The real assignees in this task will be: Nicola Smit <nicola@kaleidoscopesa.co.za>". The main content area has tabs for "Form Fields", "Attachments (0)", and "Comments (0)". Under "Form Fields", there is a section titled "General information" with a dropdown arrow and a link "Click to expand this section". Below this is a "Form fields" section with a dropdown arrow. The form contains several input fields: "Patient ID Number" (with value "0000000000001"), "Patient Date of Birth" (with value "0001/01/01" and a calendar icon), "Patient Full Name" (with value "Patient Name"), "Patient Surname" (with value "Patient Surname"), and "Patient File Number" (empty).

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.

The screenshot shows a task titled "PPBUILD-149 - Review Patient Information" with a sub-header "Practice Patient Process - Last update: 2025/10/08 12:23:16". Below the title bar is a button labeled "Review Complete". A green banner below the title bar contains the text "The real assignees in this task will be: Nicola Smit <nicola@kaleidoscopesa.co.za>". The main content area has tabs for "Form Fields", "Attachments (0)", and "Comments (0)". Under "Form Fields", there is a section titled "General information" with a dropdown arrow and a link "Click to expand this section". Below this is a "Form fields" section with a dropdown arrow. The form contains several input fields: "Patient ID Number" (with value "0000000000001"), "Patient Date of Birth" (with value "0001/01/01" and a calendar icon), "Patient Full Name" (with value "Patient Name"), "Patient Surname" (with value "Patient Surname"), and "Patient File Number" (empty).

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

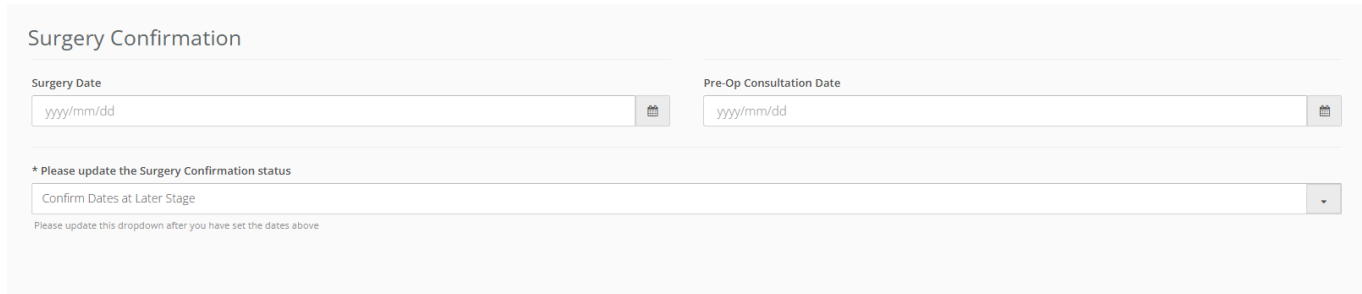
On the consultation date, a task titled **"Coordinate Surgery and Pre-Op Dates (Day of Consultation)"** appears in your inbox with a countdown timer.

The screenshot shows a task titled "PPBUILD-136 - Coordinate Surgery and Pre-Op Dates (Day of Consultation)" with a sub-header "Practice Patient Process - Last update: 2025/10/02 18:25:09". In the top right corner, there is a green badge with the text "1d 5h 34m | 2025/10/03".

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:

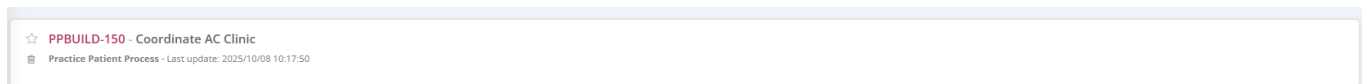
Failure to complete the tasks **"Coordinate Surgery and Pre-Op Dates (Day of Consultation)"** or **"Coordinate Surgery and Pre-Op Dates"** promptly (especially for surgeries scheduled within a week) delays patient communications and pre-op tasks.

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.

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 \(If Assigned\)](#))

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

for internal use

Surgery Date

Pre-Op Consultation Date

Coordinate Aneathetists Clinic

Anesthetist Name

Anesthetist Email Use ", " to separate multiple email addresses.

AC Clinic assigned AC Clinic not assigned

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.

☆ PPBUILD-151 - Day 10 Follow Up Call
Practice Patient Process - Last update: 2025/10/08 11:32:37

☆ PPBUILD-152 - Day 1 Follow Up Call
Practice Patient Process - Last update: 2025/10/08 11:32:22

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.

Follow-Up Interactions

Post-Op Calls

* Day 1: Post-Op Call Notes

Follow Up Messages

Day 1: Follow Up Message Form Identifier

Task done

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

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.

Patient Update - Patient Surname, Patient Name

Move

Unsubscribe

10:30 (0 minutes ago)

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

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

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

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

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

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

Move

Unsubscribe

18:38 (0 minutes ago)

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 



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to me ▾

11:35 (0 minutes ago) ☆ ☺ ↶ ⋮

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@kaleidoscope.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 Orthopaedics


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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](#)

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



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13:29 (0 minutes ago) ☆ ☺ ↶ ⋮

Dear Aneathetists Name,

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.

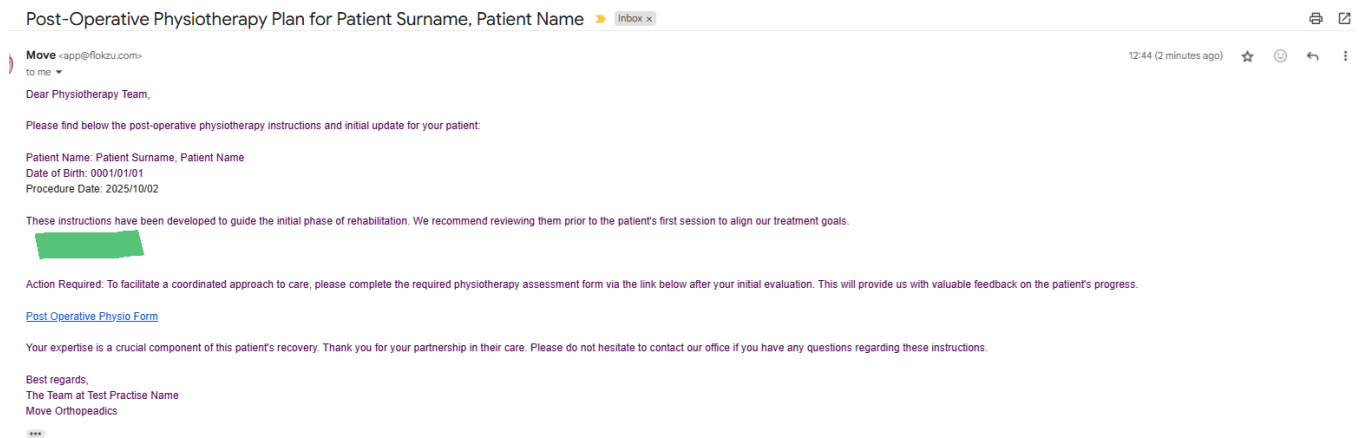
Sincerely,
The Team at Test Practise Name
Move Orthopaedics

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

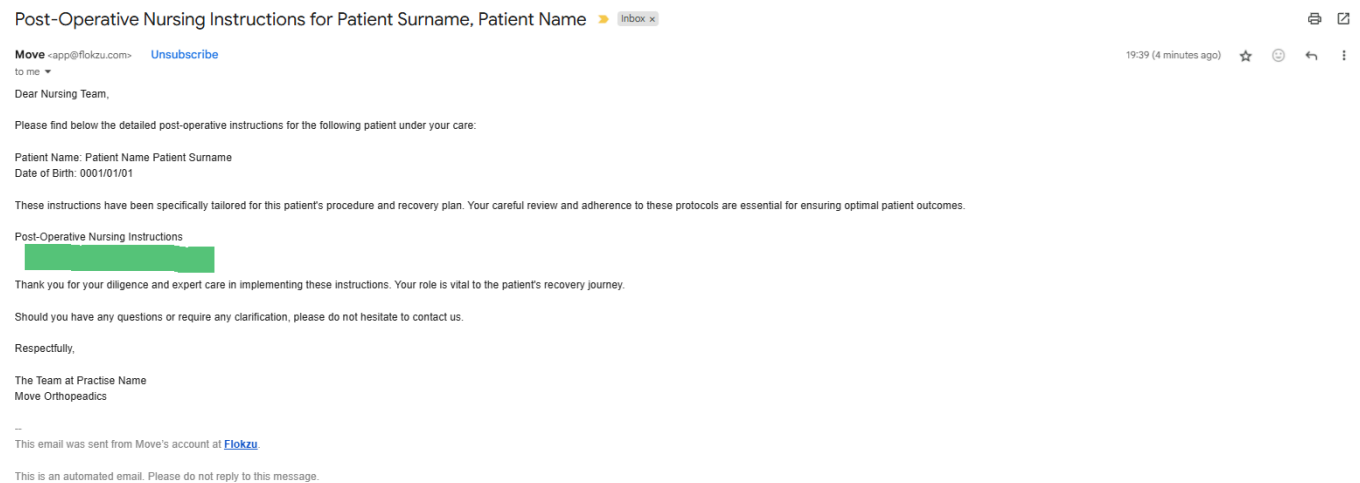
Physiotherapists receive instructions with an AI-generated summary from the Heidi surgery recording and a post-op physio form link.

[Example Post-Operative Physio Form](#)



Post-Operative Nursing Instructions Sent to Nurse

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



Surgery Summary Sent to Patient

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

Practise Name Surgery Summary from



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19:29 (0 minutes ago) ☆ ☺ ↶ ⋮

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:



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 Orthopaedics

—
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SOS Message Sent to Patient

directly after discharge

Practise Names' SOS Information

▶ Inbox x



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to me ▾

19:07 (4 minutes ago) ☆ ☺ ↶ ⋮

Dear Patient Name,

Please save this email for easy reference throughout your recovery.

If you experience any of the following warning signs, please contact us immediately:

Fever above 38.3°C

Signs of infection at the incision site (e.g., increasing redness, swelling, warmth, or pus)

Severe or worsening pain not relieved by prescribed medication

Chest pain or shortness of breath

Calf pain, swelling, or redness (especially in one leg)

Numbness or weakness that is new or worsening

Any other severe or concerning symptom

In case of an emergency, please call our practice directly at:
+27829473208

If your concern is urgent and you are unable to reach us, please go to the nearest emergency room or call 911.

We are here to support you. Do not hesitate to call with any questions or concerns, big or small.

Sincerely,
The Team at Practise Name
Move Orthopaedics

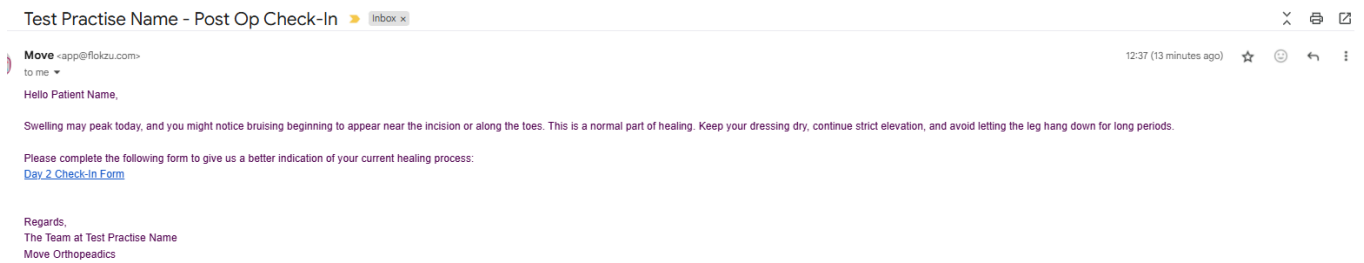
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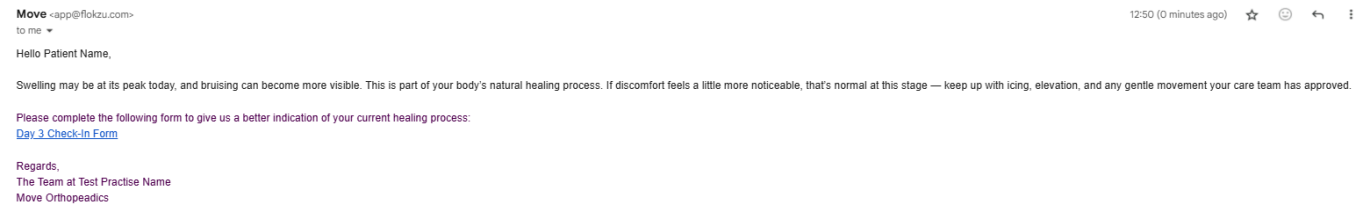
Follow Up Messages Form Links Sent to Patient

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

[Example Follow Up Message Form](#)



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



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

Identifier	Name & Surname	Procedure	Period	Practise Patient Process ID
There is no data to show				
<div>1234567890</div>				

Average Pain Levels

00

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.

The screenshot shows a task interface for 'PPBUILD-126 - Edit Patient Information and/or Update Patient Status'. At the top, there is a header bar with the task title and a green status indicator showing '1d 15h 17m | 2025/10/01'. Below the header, the main area contains a 'Patient Status Update' dropdown menu. At the bottom, there are four buttons: 'Patient Information Updated', 'Patient Status Updated', 'Both', and 'Neither'. A small icon is visible in the bottom right corner.

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.