

# Flokzu REAMDE Maintenance Guide - Move Orthopaedics Practise Patient Process

This formal protocol delineates standardized procedures for monitoring patient progression, retrieving patient-specific data, validating automated Heidi instance creation, and executing manual interventions when automation fails (e.g., receptionist-initiated Heidi instances).

**Primary Tool:** [Flokzu Cloud State](#)

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## End-Process States: Detailed Explanation

### 1. "Process Completed - (Finalized by Administrator)"

This real-time end-process state appears in instances under the following conditions:

1. **Legacy Migration Failures (v1 → v2/v3):** Instances originating in version 1 that could not be automatically migrated to the current version (or became obsolete due to elapsed time).
2. **Timer/Task Re-Initiation (v2 → v3):** Instances residing in timer nodes or specific tasks within v2 that were updated during the v3 redesign, subsequently re-initiated post-v3 deployment.
3. **Ad-Hoc Re-Initiation (Pre-v3):** Instances manually terminated and restarted by receptionists to accommodate consultation date changes requested prior to v3 launch.

**Recommendation:** Periodic cleanup of these obsolete instances should be considered to maintain system hygiene.

### 2. "No Surgery"

This end-process **does not comprehensively capture all instances** where the physician selected the "no surgery" pathway.

**Reason:** A token may remain in the "**Review Patient Information**" task. Only upon receptionist completion of this task does the instance transition to "**Review Patient Information Completed**" (the final end-process). The instance terminates at whichever of these two tasks is completed last.

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# Common Queries & Standardized Actions

## How to add "procedure" type option to dropdown

1. Go to Databases tab in Flokzu
2. Find "Follow Up Messages"
3. Add the name of the procure and with all associated coms
4. Save
5. Update scripts in external processes that use "procedure" field
  - Pre-Op Form - used to hide you some form fields
  - Follow Up Message Forms - not currently used
  - Post-Op Forms - used to hide you some form fields

## How to change Consultation, Pre-Op and/or Surgery Date

1. Find patient in respective "Change Dates" custom report (per doctor)

### Dr Wever Date Changes

Permissions ▾

Users or Roles who can access this report through a link in their menu

User Management ✖ Angie Bekker <angelineforming@gmail.com> ✖ Kelly Peters <massyn.kelly@gmail.com> ✖ Waldi Wever <accounts@drstefanwever.co.za> ✖ Wiepke <wiepke91@gmail.com> ✖

Report name and description will be visible to all users who have access to it.

### Dr Hardcastle Date Changes

Permissions ▾

Users or Roles who can access this report through a link in their menu

User Management ✖ Angie Bekker <angelineforming@gmail.com> ✖ Melissa Stanley <melissa@orthopaedichealth.co.za> ✖

Report name and description will be visible to all users who have access to it.

### Dr Groenewald Date Changes

Permissions ▾

Users or Roles who can access this report through a link in their menu

User Management ✖ Angie Bekker <angelineforming@gmail.com> ✖ Brethia Groenewald <brethia@gmail.com> ✖ Deidre <admin@drgroenewald.co.za> ✖

Report name and description will be visible to all users who have access to it.

2. Copy & Paste link in field "Change Dates Form Link" into new window in browser

*NOTE: looking into making this a hyperlink which can be clicked on instead*

### Important Note

Cannot change date of Consultation, Pre-Op Consultation or Surgery on day of Consultation,

Pre-Op Consultation or Surgery  
*because bot would have already created the instance*

## Determine the current workflow step for a specific patient

Utilize [INTERNAL - find patient associated details](#).

## Retrieve patient-specific information (e.g., email, surgery decision)

Utilize [INTERNAL - find patient associated details](#).

## Confirm bot has correctly created all Heidi instances for today

Utilize [INTERNAL MAINTENANCE - verify instances created in Heidi](#).

## Assess backlog of bot-retrieved Heidi transcripts

Utilize [INTERNAL MAINTENANCE - check on waiting for transcript](#).

## Manually input transcripts into Flokzu from Heidi (*triggered by bot failure to create patient, followed by receptionist creation*)

Utilize [Manually Add Transcripts to Flokzu](#).

## View physician's scheduled upcoming events

Utilize [INTERNAL - view doctors upcoming events](#).

## Identify all "no-surgery" cases

Utilize [INTERNAL - find patient associated details](#) and apply filter: *Surgery = No.*

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## Custom Reports

### **INTERNAL - find patient associated details**

## Report Link: INTERNAL - find patient associated details

Identifier	Initiation date	Task Name	Patient Name & Surname	Surgery	Patient Email Address	Patient Phone Num	Doctor Name	Referring Doctor Name	Referring Doctor Email	Anesthetist Name	Anesthetist Email
		Tasks									
PPBUILD-1	2025-06-20 13:28:2	1 year form		Yes	pmaccio@integrado			Jose	pmaccio@flokzu.com		
PPBUILD-41	2025-08-20 13:05:5	Pre-op Consultation		Yes	paton@kaleidoscop	0713136902		Test using self	nlsmit97@gmail.com		
PPBUILD-42	2025-08-20 13:32:5	1 week		Yes	paton@kaleidoscop	07213136902		Test using self	nlsmit97@gmail.com		
PPBUILD-110	2025-09-04 15:56:0	7 days		Yes	hannes@cog3nt.co	27651293767		Self	hannes@cog3nt.com		
PPBUILD-143	2025-09-09 09:06:0	Surgery Date - 1		Yes	nlsmit97@gmail.com	+27829473208		Self-Self	nicola@kaleidoscopes	Nicola	nlsmit97@gmail.com
PPBUILD-151	2025-09-09 13:47:5	day of consultation		No	christjewell.sa@gmail	+27829243398					
PPBUILD-172	2025-09-11 11:47:1	Process Complete		Yes	gpdall@afrika.com	+27827844326	Johann Groenewald	HERMAN KOTZE	sportmedies@gmail.co		
PPBUILD-179	2025-09-12 08:25:1	Process Complete		Yes	gm@peninsula.co.za	0822253098	Peter Hardcastle				
PPBUILD-180	2025-09-12 08:26:1	Process Complete		Yes	jamesdick667@gmail	0729571846	Peter Hardcastle				
PPBUILD-181	2025-09-12 08:28:0	Process Complete		Yes	esmevdm67@gmail	0662254074	Peter Hardcastle				
PPBUILD-182	2025-09-12 08:29:1	Process Complete		Yes	claudine@vanwyk.c	0828232262	Peter Hardcastle				
PPBUILD-183	2025-09-12 08:31:1	Process Complete		Yes	amtayloras@gmail.c	0609600663	Peter Hardcastle	Dr E Viljoen	medprax@drerika.co.z		
PPBUILD-184	2025-09-12 08:32:1	Process Complete		No	ellenb.botes@gmail	+27714180076	Peter Hardcastle				
PPBUILD-185	2025-09-12 08:33:1	Process Complete		No	lisechka@gmail.com	+27714180076	Peter Hardcastle				
PPBUILD-186	2025-09-12 08:35:1	Process Complete		No	lisechka@gmail.com	+27714180076	Peter Hardcastle				

[Navigation icons: back, forward, first, last, etc.]

## INTERNAL - view doctors upcoming events

### Report Link: INTERNAL - view doctors upcoming events

Task Name	Initiation date	Due Date	Identifier	Patient Name & Surname	Doctor Name
Tasks					
Awaiting Pre-Op Consultation	2025-10-17 12:48:24	2025-11-06 23:59:59	PPBUILD-351	CATHERINE WALLACE WILSON	Dr J Groenewald
Awaiting Pre-Op Consultation	2025-10-17 14:12:42	2025-11-12 23:59:59	PPBUILD-359	Rokia Skippers	Dr P Hardcastle
Awaiting Consultation	2025-10-30 10:05:28	2025-11-17 23:59:59	PPBUILD-425	Johan Hamman	Dr S Wever
Awaiting Consultation	2025-10-30 10:25:15	2025-11-17 23:59:59	PPBUILD-430	Hendrik Kleynhans	Dr S Wever
Awaiting Consultation	2025-10-30 10:25:51	2025-11-10 23:59:59	PPBUILD-431	Michele Bellini	Dr S Wever
Awaiting Consultation	2025-10-30 10:27	2025-11-25 23:59:59	PPBUILD-434	Willemien Heunis	Dr S Wever
Awaiting Consultation	2025-10-30 10:27:31	2025-11-19 23:59:59	PPBUILD-435	Louis Francois Blom	Dr S Wever
Awaiting Consultation	2025-10-30 10:28:02	2025-12-15 23:59:59	PPBUILD-436	Gesie van der Merwe	Dr S Wever
Awaiting Consultation	2025-10-30 10:28:36	2025-11-25 23:59:59	PPBUILD-437	Hendre Terblanche	Dr S Wever
Awaiting Consultation	2025-10-30 10:29:15	2025-11-17 23:59:59	PPBUILD-438	Noeleen Jackson	Dr S Wever
Awaiting Consultation	2025-10-30 10:30:40	2025-12-01 23:59:59	PPBUILD-439	Gavin Hinrichsen	Dr S Wever
Awaiting Consultation	2025-10-30 10:31:03	2025-11-26 23:59:59	PPBUILD-440	Wendy Charles	Dr S Wever
Awaiting Consultation	2025-10-30 10:31:36	2025-12-08 23:59:59	PPBUILD-441	Charles Fisher	Dr S Wever

**Critical Note:** Due Dates in this report indicate the point at which the task will be automatically completed by the system:

- Awaiting Consultation → transitions to Consultation
- Awaiting Pre-Op → transitions to Pre-Op Consultation
- Awaiting Surgery → transitions to Surgery

## INTERNAL MAINTENANCE - verify instances created in Heidi

### Report Link: INTERNAL MAINTENANCE - verify instances created in Heidi

**Applicable Stages:**

- Consultation
- Pre-Op Consultation
- Surgery

Identifier 🕒	Task Name Tasks	Patient Name & Surname	Consultation Date	Pre-Op Consultation Date	Surgery Date	Doctor Name	Assigned Receptionist
PPBUILD-330	Consultation	Somarlie Keown	2025/10/13			Dr S Wever	angelineforming@gmail.com
PPBUILD-357	Pre-Op Consultation	Desmond Mudge	2025/10/20	2025/10/29	2025/11/05	Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-384	Pre-Op Consultation	Jonathan Tacon	2025/10/23	2025/11/05	2025/11/18	Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-407	Consultation	IDA DALEEN STEENKAMP	2025/10/27			Dr J Groenewald	admin@drgroenewald.co.za
PPBUILD-444	Consultation	Brethia Groenewald	2025/11/04			Dr S Wever	angelineforming@gmail.com
PPBUILD-465	Consultation	Elizabeth Braamse	2025/11/04			Dr S Wever	angelineforming@gmail.com
PPBUILD-470	Consultation	Tania Ferreira	2025/11/05			Dr S Wever	massyn.kelly@gmail.com
PPBUILD-471	Consultation	Cheryl Igmann-Frost	2025/11/05			Dr S Wever	massyn.kelly@gmail.com
PPBUILD-472	Consultation	Tjaart Lotter	2025/11/05			Dr S Wever	massyn.kelly@gmail.com
PPBUILD-473	Consultation	Lorraine Geldenhuys	2025/11/05			Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-474	Consultation	Elizabeth Kalp	2025/11/05			Dr P Hardcastle	melissa@orthopaedichealth.co.za

## Verification Procedure

1. Navigate to the report.
2. Apply **today's date** as a filter to each of the following fields:
  - Consultation Date
  - Pre-Op Consultation Date
  - Surgery Date
3. Confirm that all expected Heidi instances appear.

## INTERNAL MAINTENANCE - check on waiting for transcript

Report Link: [INTERNAL MAINTENANCE - check on waiting for transcript](#)

### Hidden Tasks Monitored:

- HIDDEN Wait for Consultation Transcript
- HIDDEN Wait for Pre-Op Consultation Transcript
- HIDDEN Wait for Surgery Transcript

Identifier 🕒	Task Name Tasks	Initiation date 🕒	Doctor Name	Patient Name & Surname	Assigned Receptionist
PPBUILD-339	HIDDEN Wait for Consultation Transcript	2025-10-15 16:13:05	Dr J Groenewald	HILARY ANN LOOS	admin@drgroenewald.co.za
PPBUILD-342	HIDDEN Wait for Consultation Transcript	2025-10-15 18:55	Dr P Hardcastle	Friedrich Faustenhammer	melissa@orthopaedichealth.co.za
PPBUILD-344	HIDDEN Wait for Consultation Transcript	2025-10-16 09:21:57	Dr P Hardcastle	Johannes Jooste	melissa@orthopaedichealth.co.za
PPBUILD-387	HIDDEN Wait for Consultation Transcript	2025-10-22 12:32:42	Dr P Hardcastle	Heidemarie Gregor	melissa@orthopaedichealth.co.za
PPBUILD-445	HIDDEN Wait for Consultation Transcript	2025-10-30 13:36:17	Dr S Wever	Daniella De Sousa	angelineforming@gmail.com
PPBUILD-451	HIDDEN Wait for Consultation Transcript	2025-10-31 10:53:43	Dr J Groenewald	LISEL KRIGE	admin@drgroenewald.co.za
PPBUILD-456	HIDDEN Wait for Consultation Transcript	2025-11-03 14:43:29	Dr P Hardcastle	Hannah Sillifant	melissa@orthopaedichealth.co.za
PPBUILD-457	HIDDEN Wait for Consultation Transcript	2025-11-03 14:50:15	Dr P Hardcastle	Candice Cooper	melissa@orthopaedichealth.co.za
PPBUILD-458	HIDDEN Wait for Consultation Transcript	2025-11-03 14:51:29	Dr P Hardcastle	Allan Jones	melissa@orthopaedichealth.co.za
PPBUILD-459	HIDDEN Wait for Consultation Transcript	2025-11-03 14:53:38	Dr P Hardcastle	Joan Rogers	melissa@orthopaedichealth.co.za
PPBUILD-460	HIDDEN Wait for Consultation Transcript	2025-11-03 14:54:41	Dr P Hardcastle	Anthony Garner	melissa@orthopaedichealth.co.za
PPBUILD-461	HIDDEN Wait for Consultation Transcript	2025-11-03 14:56:03	Dr P Hardcastle	Martha Groesbeek	melissa@orthopaedichealth.co.za
PPBUILD-462	HIDDEN Wait for Consultation Transcript	2025-11-03 14:57:34	Dr P Hardcastle	Cornel Nieuwenhuizen	melissa@orthopaedichealth.co.za

# Backlog Analysis Procedure

- Use the `Initiation Date` field to calculate the duration an instance has remained in this state.
- **Acceptable Threshold:** No instance should exceed **1 day** in this queue (bot performs regular checks).

## Alternative Real-Time Monitoring:

> PPBUILD-403	2025-10-28 00:00:20	3 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-373	2025-10-28 00:00:19	3 D	({{ Administrator }})	Stefan; {{ Administrator }}		
> PPBUILD-410	2025-10-28 00:00:19	3 D	({{ Administrator }})	Stefan; {{ Administrator }}		
> PPBUILD-406	2025-10-28 00:00:19	3 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-334	2025-10-28 00:00:17	3 D	({{ Administrator }})	Stefan; {{ Administrator }}		
> PPBUILD-387	2025-10-27 08:19:54	3 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-389	2025-10-27 08:19:39	3 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-339	2025-10-24 14:25:28	6 D	({{ Administrator }})	Johann Groenewald; {{ Administrator }}		
> PPBUILD-316	2025-10-23 10:24:14	7 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-318	2025-10-23 10:23:48	7 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-342	2025-10-23 10:23:22	7 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-346	2025-10-23 10:22:24	7 D	({{ Administrator }})	Peter; {{ Administrator }}		
> PPBUILD-344	2025-10-23 10:20:37	7 D	({{ Administrator }})	Peter; {{ Administrator }}		

Visually inspect for aged instances.

## If Instance >1 Day Old

### Potential Root Causes:

1. Receptionist manually created the Heidi instance (bypassing bot).
2. Physician has not yet recorded the consultation.

**Required Action:** Proceed to [Manually Add Transcripts to Flokzu](#).

### Future Automation Enhancement:

The bot will be configured to **auto-complete** the `Consultation`, `Pre-Op Consultation`, and `Surgery` tasks upon detection of a Heidi recording.

# Procedure: Manually Add Transcripts to Flokzu

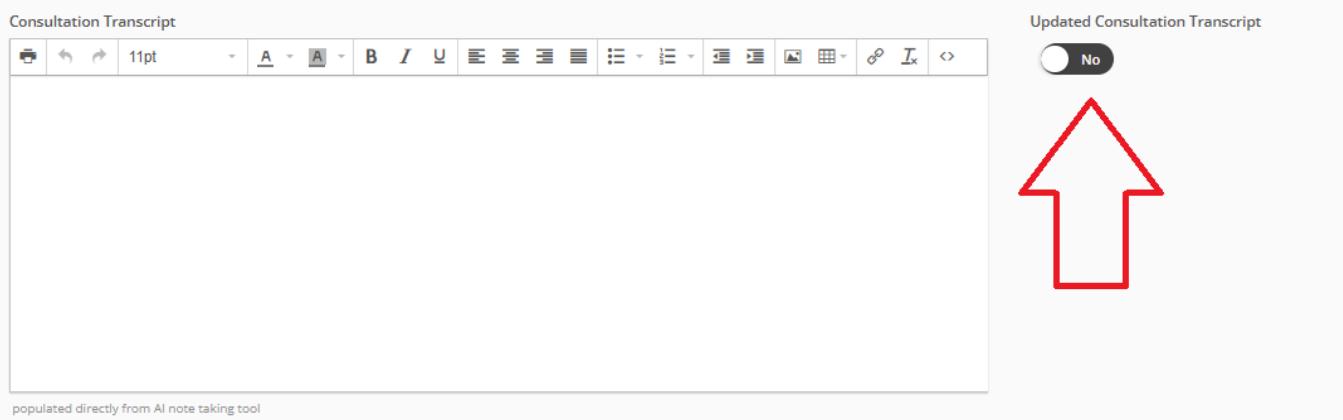
**Use Case:** Bot failed to create patient record → Receptionist manually created Heidi instance → Bot unable to retrieve transcript.

## Mandatory Pre-Processing Rules

Prior to pasting transcript text into Flokzu:

1. **Remove all special characters:** " , & , ' , , etc.
  2. **Eliminate all line breaks:** Convert entire transcript into a **single contiguous string**.
- 

## Consultation Transcript Entry



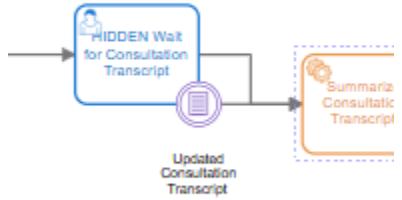
## Critical Field Update

- Set **Updated Consultation Transcript = "Yes"**  
*(This flag is normally set automatically by the bot)*

**Warning:** Failure to set this field to "Yes" will **terminate the workflow prematurely**.



## Proposed Task Configuration Improvement



**⚠️ Confirm with Flokzu Team** Changing task configuration may cause errors on new version launch with "**Automatically update process instances**" enabled

#### Additional Settings ▾

Description...

Process general description ( If you select 'Yes', opening your process instances will update them to the last deployed version of the process.

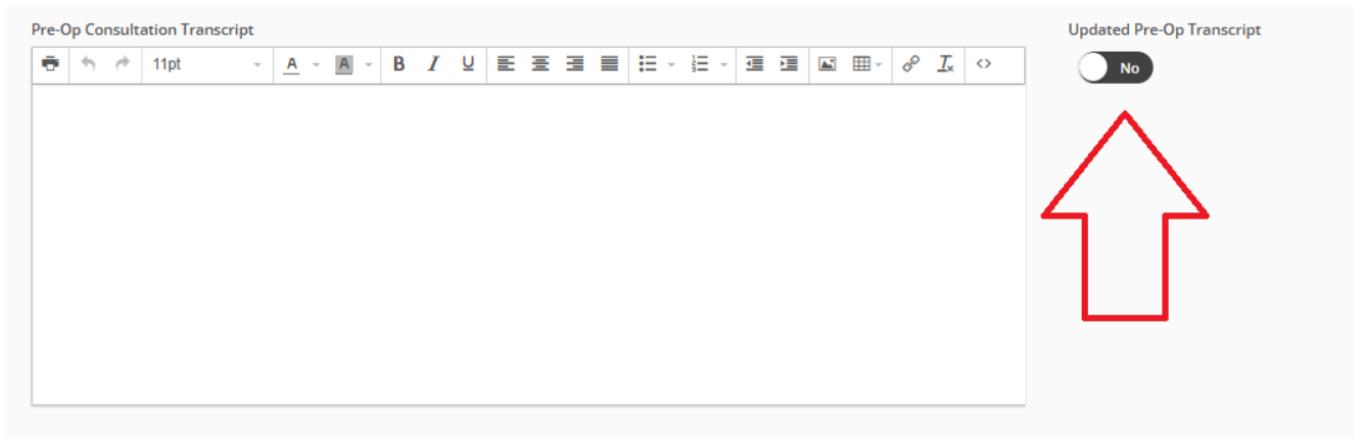
Automatically update process instances ?

Yes

#### Deployment Options:

- incorporate change in next version for **Consultation**, **Pre-Op Consultation**, and **Surgery** tasks (assuming no issue)  
OR
- deploy new version with "**Automatically update process instances**" disabled

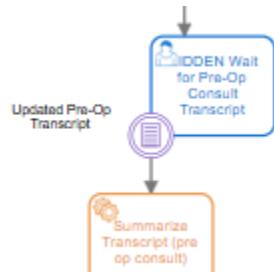
## Pre-Op Consultation Transcript Entry



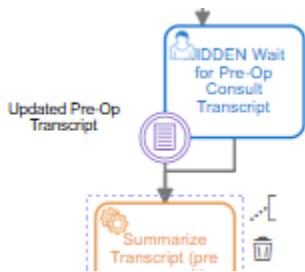
## Critical Field Update

- Set Updated Pre-Op Consultation Transcript = "Yes"

**Warning:** Failure to set this field to "Yes" will terminate the workflow prematurely.



## Proposed Task Configuration Improvement



**⚠ same deployment considerations as above.**

Additional Settings ▾

Description...

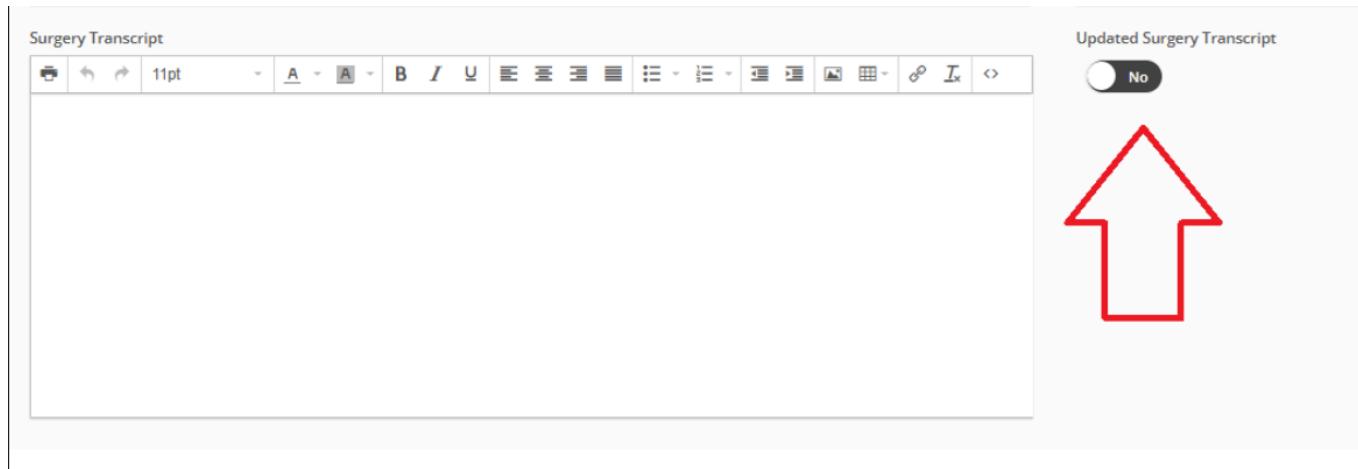
Process general description (

If you select 'Yes', opening your process instances will update them to the last deployed version of the process.

)

Automatically update process instances ?
Yes

# Surgery Transcript Entry



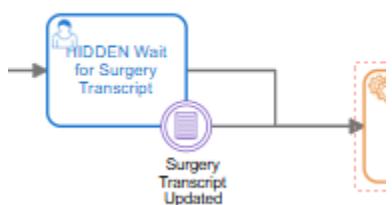
## Critical Field Update

- Set Updated Surgery Transcript = "Yes"

**Warning:** Failure to set this field to "Yes" will terminate the workflow prematurely.



## Proposed Task Configuration Improvement



**⚠ same deployment considerations as above.**

## Additional Settings ▾

Description...

Process general description (If you select 'Yes', opening your process instances will update them to the last deployed version of the process).

Automatically update process instances 

Yes 

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## End of Document

*Last Updated: November 07, 2025*