Flokzu REAMDE Maintenance Guide - Move Orthopeadics Practise Patient Process

This document outlines procedures for monitoring patient progress, retrieving patient information, verifying bot automation with Heidi, and handling manual interventions when automation fails (e.g., receptionist-created Heidi instances).

Key Tool: [Flokzu Cloud State](#)

Common Queries & Solutions

Query	Recommended Action
See what step a given patient is at	Use [INTERNAL - find patient associated details](#)
Find patient-specific info (e.g., email address)	Use [INTERNAL - find patient associated details](#)
Verify bot has created all Heidi instances correctly for today	Use [INTERNAL MAINTENANCE - verify instances created in Heidi](#)
Check backlog of bot fetching Heidi transcripts	Use [INTERNAL MAINTENANCE - check on waiting for transcript](#)
Manually add transcripts in Flokzu from Heidi (Occurs when bot failed to create patient and receptionist did so, preventing bot from fetching info)	Use [Manually Add Transcripts to Flokzu](#)
View doctor's upcoming events	Use [INTERNAL - view doctors upcoming events](#)

Custom Reports

INTERNAL - find patient associated details

Link: [INTERNAL - find patient associated details](#)

Identifier	Initiation date	Task Name	Patient Name &	Patient Email Ac	Patient Phone N	Doctor Name	Referring Doctor	Referring Doctor E	Aneathetist Name	Anesthetist Email
		Tasks ▾								
PPBUILD-197	2025-09-15 10:5	Process Comple		johannescloete@	+27847103036	Johann Groenewa				
PPBUILD-198	2025-09-15 13:3	Process Comple		heidi@hallitrust.	+27823396876	Stefan Wever	JACO STEENKAMP	doctors.helderberg		
PPBUILD-199	2025-09-15 14:0	Waiting 2 Busine		brian@integ.co.z	+27828936789	Stefan Wever	Danie Asewegen	reception@fairview		
PPBUILD-200	2025-09-15 16:2	Waiting 2 Busine		leonardswarts19	+27649083587	Stefan Wever	JAYNE BRODERICK	jaynephysio@gmail		
PPBUILD-210	2025-09-16 11:4	Process Comple		craigwlister0@gr	+27823263096	Dr S Wever	Warren Visser	warren700v@gmail		
PPBUILD-213	2025-09-16 14:1	No Surgery		nelladewaal@gm	+27833370123	Dr S Wever	BRIAN GOSLING	vismar@lantic.net		
PPBUILD-214	2025-09-16 19:5	Process Comple		jordaan.anita@g	+27836331506	Dr S Wever				
PPBUILD-216	2025-09-17 11:3	Process Comple		divdutoit@absar	+27827725024	Dr J Groenewald				
PPBUILD-217	2025-09-17 11:5	Process Comple		elbie.mong@wes	+27833056978	Dr J Groenewald				

1 2 3 4 5 6 7 8 9 0

INTERNAL - view doctors upcoming events

Link: INTERNAL - view doctors upcoming events

Report: INTERNAL - view doctors upcoming events

Task Name	Initiation date	Due Date	Identifier	Patient Name & Surname	Doctor Name
Tasks ▾					
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 10:26:17	2025-11-05 23:59:59	PPBUILD-432	Cheryl Ilgmann-Frost	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
Awaiting Consultation	2025-10-30 10:32:02	2025-11-25 23:59:59	PPBUILD-442	Charl Cronje	Dr S Wever

NOTICE: Due dates indicate when the task will be **auto-completed**

- `Awaiting Consultation` → `Consultation`
- `Awaiting Pre-Op` → `Pre-Op Consultation`
- `Awaiting Surgery` → `Surgery`

INTERNAL MAINTENANCE - verify instances created in Heidi

Link: INTERNAL MAINTENANCE - verify instances created in Heidi

- Consultation
- Pre-Op Consultation
- Surgery

Report: INTERNAL MAINTENANCE - verify instances created in Heidi

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-400	Surgery	Test Test	2025/10/24	2025/10/24	2025/10/24	Dr Smit (Test)	nicola@kaleidoscopesa.co.za
PPBUILD-407	Consultation	IDA DALEEN STEENKAMP	2025/10/27			Dr J Groenewald	admin@drgroenewald.co.za
PPBUILD-433	Consultation	Dawid Volschenk	2025/11/03			Dr S Wever	massyn.kelly@gmail.com
PPBUILD-444	Consultation	Brethia Groenewald	2025/11/04			Dr S Wever	angelineforming@gmail.com
PPBUILD-445	Consultation	Daniella De Sousa	2025/11/03			Dr S Wever	angelineforming@gmail.com
PPBUILD-447	Consultation	Michiel Andries Buys	2025/11/03			Dr S Wever	angelineforming@gmail.com
PPBUILD-454	Consultation	MALEHLONONO BIBIAN NOOI	2025/11/04			Dr J Groenewald	admin@drgroenewald.co.za
PPBUILD-456	Consultation	Hannah Sillifant	2025/11/03			Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-457	Consultation	Candice Cooper	2025/11/03		2025/11/20	Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-458	Consultation	Allan Jones	2025/11/03	2025/11/19	2026/01/14	Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-459	Consultation	Joan Rogers	2025/11/03			Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-460	Consultation	Anthony Garner	2025/11/03			Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-461	Consultation	Martha Groesbeek	2025/11/03			Dr P Hardcastle	melissa@orthopaedichealth.co.za
PPBUILD-462	Consultation	Carnel Nieuwenhuizen	2025/11/03			Dr P Hardcastle	melissa@orthopaedichealth.co.za

Instructions

Verify the bot has created all required Heidi instances using the following task types with **today's date**:

- `Consultation`
- `Pre-Op Consultation`
- `Surgery`

INTERNAL MAINTENANCE - check on waiting for transcript

Link: INTERNAL MAINTENANCE - check on waiting for transcript

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

Report: INTERNAL MAINTENANCE - check on waiting for transcript

Identifier	Task Name	Initiation date	Doctor Name	Patient Name & Surname	Assigned Receptionist
	Tasks				
PPBUILD-329	HIDDEN Wait for Consultation Transcript	2025-10-13 16:25:52	Dr S Wever	Jacques Heine	massyn.kelly@gmail.com
PPBUILD-332	HIDDEN Wait for Consultation Transcript	2025-10-14 11:20:51	Dr S Wever	Natalie Victor	angelineforming@gmail.com
PPBUILD-333	HIDDEN Wait for Consultation Transcript	2025-10-14 11:45:25	Dr S Wever	Janke Nel	angelineforming@gmail.com
PPBUILD-338	HIDDEN Wait for Consultation Transcript	2025-10-15 16:08:25	Dr S Wever	Liesel Coetzer	massyn.kelly@gmail.com
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-349	HIDDEN Wait for Consultation Transcript	2025-10-17 12:23:21	Dr S Wever	Philip Johannes Joubert	angelineforming@gmail.com
PPBUILD-353	HIDDEN Wait for Consultation Transcript	2025-10-17 12:53:47	Dr S Wever	Marie Patricia Dalais	angelineforming@gmail.com
PPBUILD-354	HIDDEN Wait for Consultation Transcript	2025-10-17 13:07:12	Dr S Wever	Sandra Stathakis	angelineforming@gmail.com
PPBUILD-373	HIDDEN Wait for Consultation Transcript	2025-10-20 14:33:41	Dr S Wever	Anton Bekker	massyn.kelly@gmail.com
PPBUILD-374	HIDDEN Wait for Consultation Transcript	2025-10-20 15:31:36	Dr S Wever	Anne Thomson	angelineforming@gmail.com
PPBUILD-375	HIDDEN Wait for Consultation Transcript	2025-10-21 11:48:47	Dr S Wever	Wesley Hendricks	massyn.kelly@gmail.com
PPBUILD-382	HIDDEN Wait for Consultation Transcript	2025-10-21 16:03:24	Dr S Wever	Joanne Nieuwoudt	angelineforming@gmail.com
PPBUILD-387	HIDDEN Wait for Consultation Transcript	2025-10-22 12:22:42	Dr P Hardcastle	Heidemarie Grope	melissa@orthopaedichealth.co.za

Instructions

Use the `Initiation Date` field to track how long an instance has been in this stage (to identify blockers).

🔥 Alternative: Real-Time Reports

> 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 }}	

Look for **old instances in the queue**.
There should be nothing older than 1 day (bot checks regularly).

If >1 Day Old

Possible causes:

- Receptionist manually created Heidi instance

- Doctor has not made a recording

Action: Refer to [**Manually Add Transcripts to Flokzu**](#)

> **Future Improvement:**
> Bot will auto-complete `Consultation`, `Pre-Op Consultation`, and `Surgery` tasks once a Heidi recording is found.
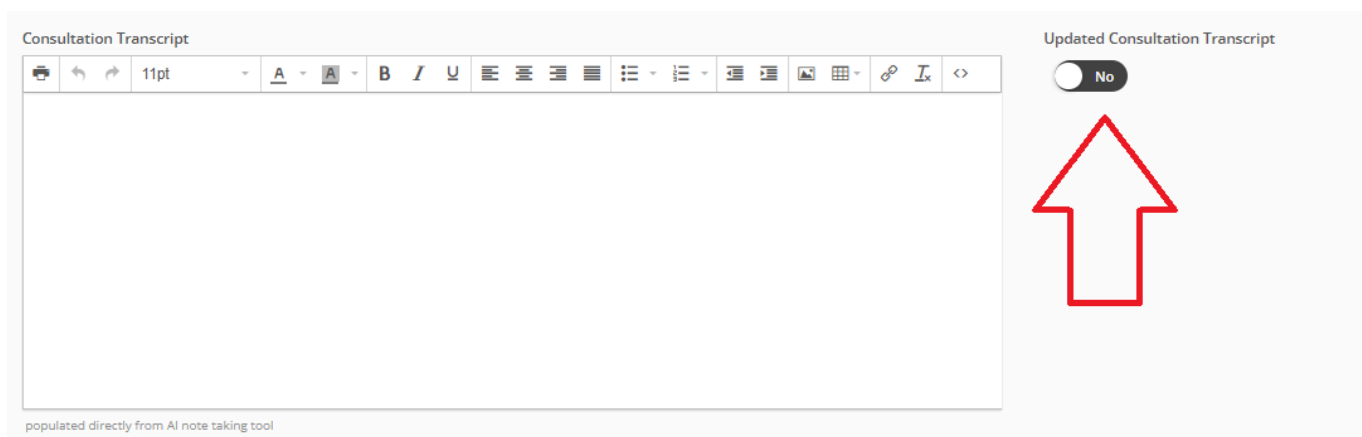

How To: Manually Add Transcripts to Flokzu

> **When to use:** Bot failed to create patient → receptionist created Heidi instance → bot cannot fetch transcript.

Critical Pre-Processing Rules

Before pasting into Flokzu:

1. **Remove all special characters**: `"`, `&`, `'`, `,`, etc.
2. **Remove all line breaks** → convert to **one long string**

Consultation

Critical Step

- Set field `Updated Consultation Transcript` to **"Yes"**
(This is normally done by the bot)

Warning: If not set to "Yes", **the flow will end**
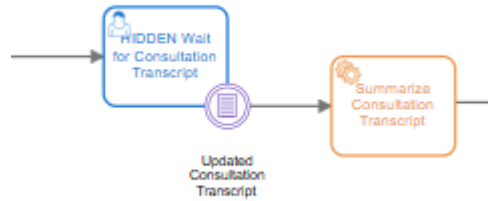
Suggested Improvement

Alter task configuration as follows:
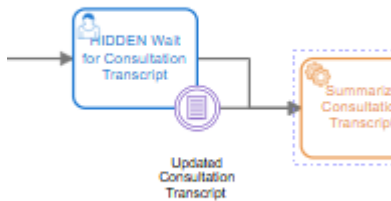
⚠ **Confirm with Flokzu Team**

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

Automatically update process instances ❓	Yes ⬤

Options:

- Include change in new version for **Consultation**, **Pre-Op Consultation**, **Surgery**

Pre-Op Consultation

Pre-Op Consultation Transcript

🖨 ↶ ↷   11pt   ▾   A ▾   A ▾   B   I   U   ≡ ≡ ≡ ≡   ☰ ▾   ☰ ▾   ⇥ ⇤   🖼 ▦ ▾   🔗   I̶ₓ   <>
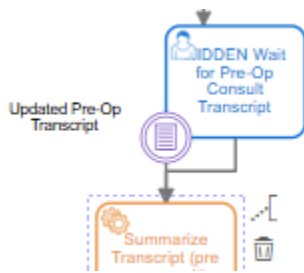
Updated Pre-Op Transcript

◯ No

Critical Step

- Set field `Updated Pre-Op Consultation Transcript` to **"Yes"**

  Warning: If not set to "Yes", **the flow will end**

  HIDDEN Wait for Pre-Op Consult Transcript

  Updated Pre-Op Transcript

  Summarize Transcript (pre op consult)

Suggested Improvement

Automatically update process instances ❓   Yes ⬤

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 ⬤
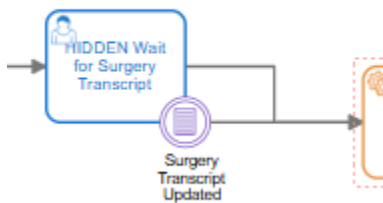

Surgery

Critical Step

- Set field `Updated Surgery Transcript` to **"Yes"**

Warning: If not set to "Yes", **the flow will end**
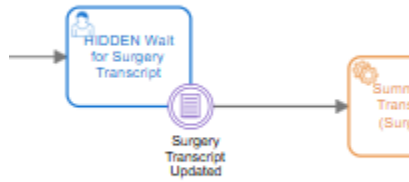
Suggested Improvement

⚠️ **Confirm with Flokzu Team** (same as above)

End of Document

Last updated: November 04, 2025