Manage

What's New

Version 7.1.2

Auditdata

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1 Introduction

The purpose of this document is to give an overview of all the new and modified features within Manage release version 7.1.2.

2 Lead Conversion Report Enhancement

The Lead Conversion Report (Excel output) has been enhanced to include new columns of data.

1) "Lead Type" which is a configurable field tracked on the PATIENT LEAD INFORMATION screen.
2) "Converted Patient Number" displays the patient number of a converted lead. If the lead has not been converted to a patient, the field is blank.

3 Editable Leads from Appointment Details

The ability to maintain Patient Leads from within the APPOINTMENT DETAILS of the APPOINTMENT SCHEDULER has been added to clinics within New Zealand and Canada (as it was previously available for Australian clinics).

This means that from within the APPOINTMENT DETAILS screen, users can review, edit or even add new Patient Leads and details without leaving the APPOINTMENT DETAILS screen.

4 New Default Marketing Method Configuration

A new configuration screen allowing users to select which marketing methods will be applied as a default to newly added Patients or Patient Leads. This is helpful for clinics who want to ensure one or more default marketing methods has been applied to all new patients or patient leads. Configuring within CONFIGURE SYSTEM SETTINGS > PATIENT > DEFAULT MARKETING METHODS which marketing methods default will save users time when adding a new patient or lead.

Within CONFIGURE SYSTEM SETTINGS > PATIENT you will find the new DEFAULT MARKETING METHODS.

5 New ‘‘No Email’’ option on Patients and Leads

Within the PATIENT INFORMATION and PATIENT LEAD INFORMATION screens, the option to indicate that a patient has no email address has been added.

Previously clinics that had EMAIL ADDRESS configured to be a mandatory field would enter a generic email such as email@email.com in order to satisfy the mandatory input of an email address when the patient did not have an email address. Now users can ensure their database no longer gets wrongly addressed with a valid way to indicate the patient/lead does not use email. This will ensure data integrity across your patient database.

6 New Zealand Order Inquiry

The ORDER INQUIRY for our New Zealand clinics has been enhanced to include new columns of data. Orders on the ORDER INQUIRY will now display the ACC BAND and the ACC FUNDING when the associated Quote is an ACC claim. This will assist clinics in New Zealand with reviewing Orders associated to ACC.

7 Credit Orders Now Display Credit Reason

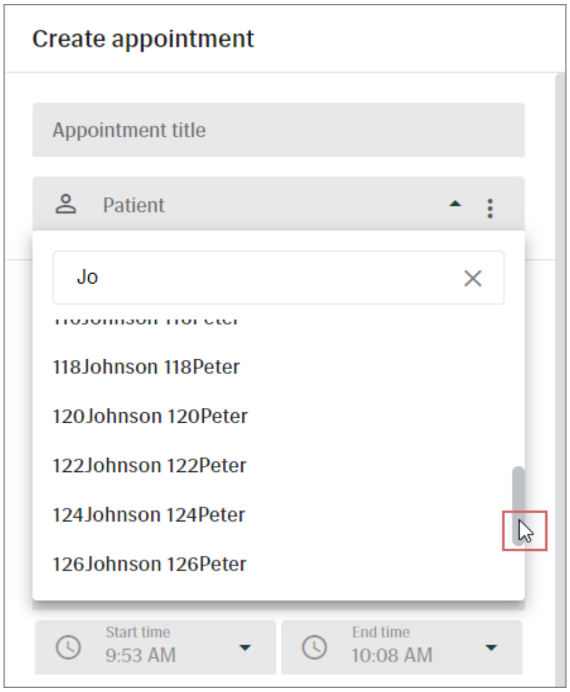
An enhancement has been made to our standard Order printed document. The Order print now includes “Credit Reason” if an order includes negative quantity, and your clinic has configured “Credit Reasons” that have been applied to a Credit Order.

8 Scheduler Search Improvements

Scheduler functionality has been improved in terms of usage convenience and performance.

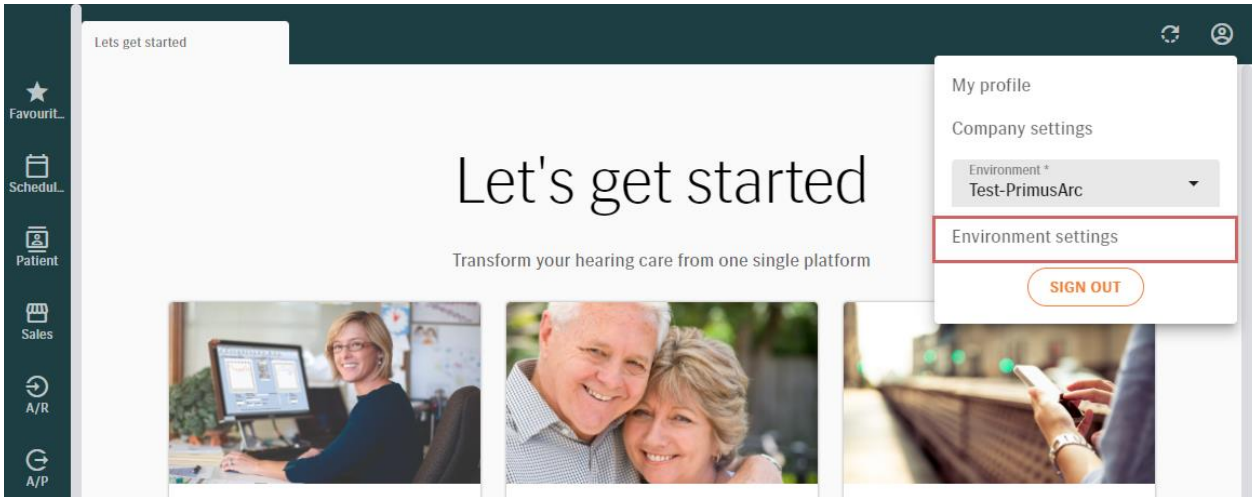
In cases when there are multiple search results, they are broken into groups of 20. The next group is shown only if the previous group does not contain the required patient or lead.

All formerly displayed search results are retained so that users can scroll back to the top of the list whenever needed.



9 Environment Settings

The User menu has been extended with *Environment settings*.



This functionality will allow users to:

1. Create and modify Surveys
2. Configure System settings
3. Manage Tasks
4. Run Global Updates
5. Work with Active Classic Sessions

All changes configured from *Environment settings* are restricted to the environment selected at login to Manage or chosen from the User menu.

10 Recalls

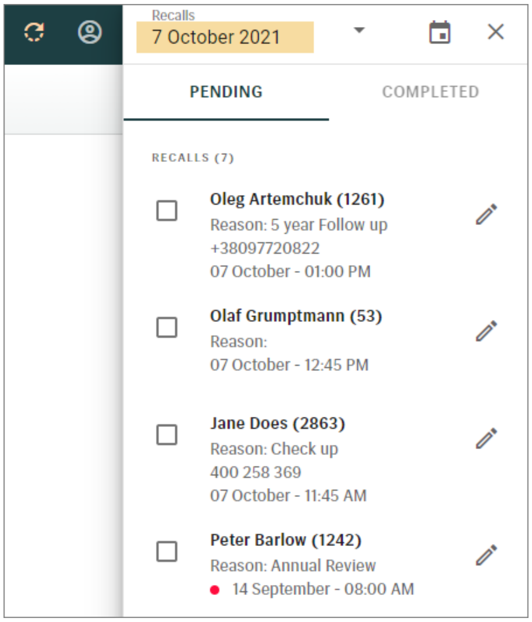
The new Recalls feature can be used to further increase client engagement as well as management efficiency in a clinic.

On the one hand, clients are spared of the necessity to remember and keep track of the follow-up meetings, hearing aid fittings and replacements, regular hearing exams. On the other, staff members can make sure that all clients are well taken care of.

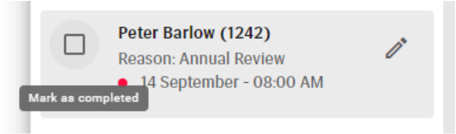
When a patient is scheduled for a recall, their name appears in the corresponding list. This list can then be handled by multiple members of staff and worked on simultaneously. All changes happening in the list are displayed for all authorized personnel who have access.

To open, click the Recall icon on the top bar. All recalls are filtered by date.

Past due recalls are respectively marked ( ). To edit the date or time of the recall, the user needs to click the **Edit** icon ( ).



When the client has been successfully contacted, the recall can be marked *completed* by clicking the empty box next to the recall summary.



The corresponding recall will then appear on the **Completed** tab.