Manage

What's New

Version 7.0.0

Auditdata

Table of Contents

1 Introduction

The purpose of this document is to give an overview of all the new and modified features within Manage release version 7.0.0.

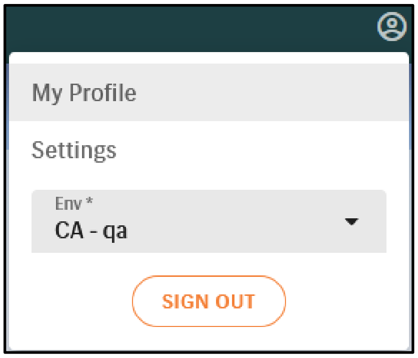
A variety of new functionality and a new suite of Auditdata tools that are now available within our Manage 7.0.0 release. This document will introduce our new Manage Scheduler, Primus Bridge, DevExpress Reports and new identity service user creation tool.

If your clinic has received custom development work, the changes outlined in this document may or may not be exactly as described. If you have any questions regarding the changes outlined in this document, please reach out to an Auditdata Customer Service Representative.

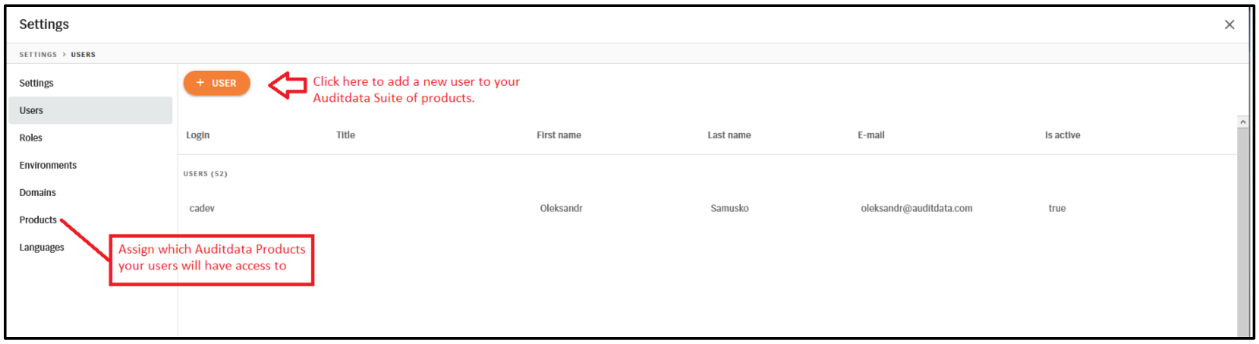
2 Manage – Add Users

A new identity service has been introduced to enable organizations manage users across the Auditdata suite of products. Now it is easy to add new users in one step and grant that user access to any of your Auditdata products.

Simply navigate within Manage to the top right and access MY PROFILE and navigate to SETTINGS.



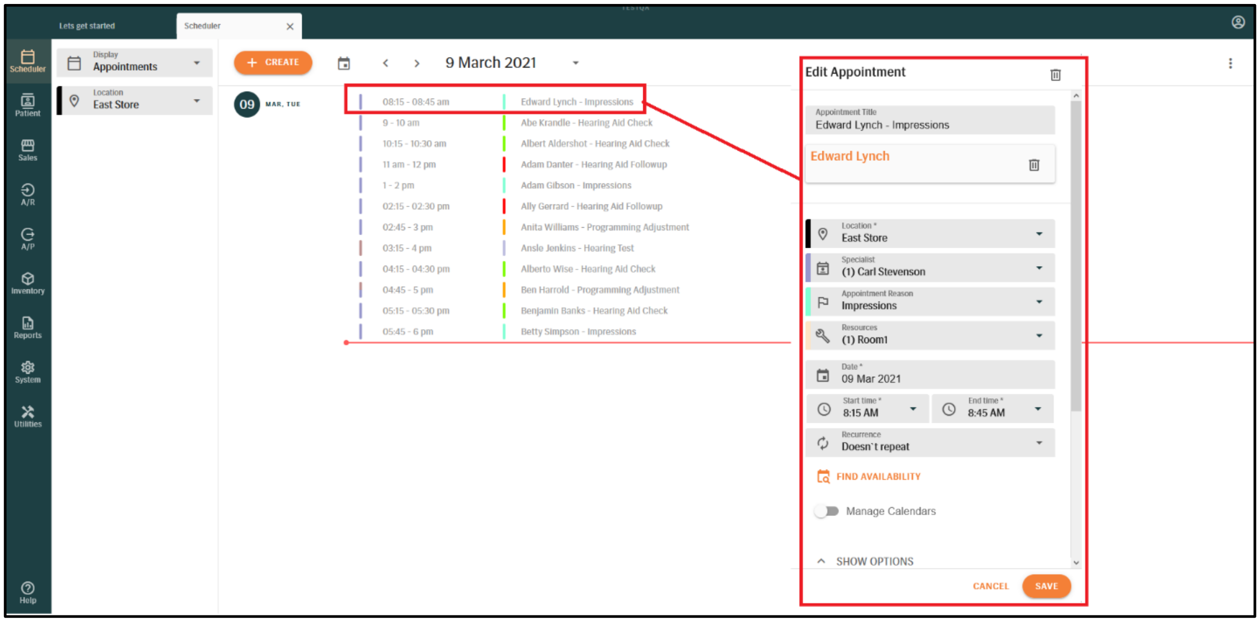
Within SETTINGS, organizations can control all new and existing user permissions and the products and environments each user has access to.



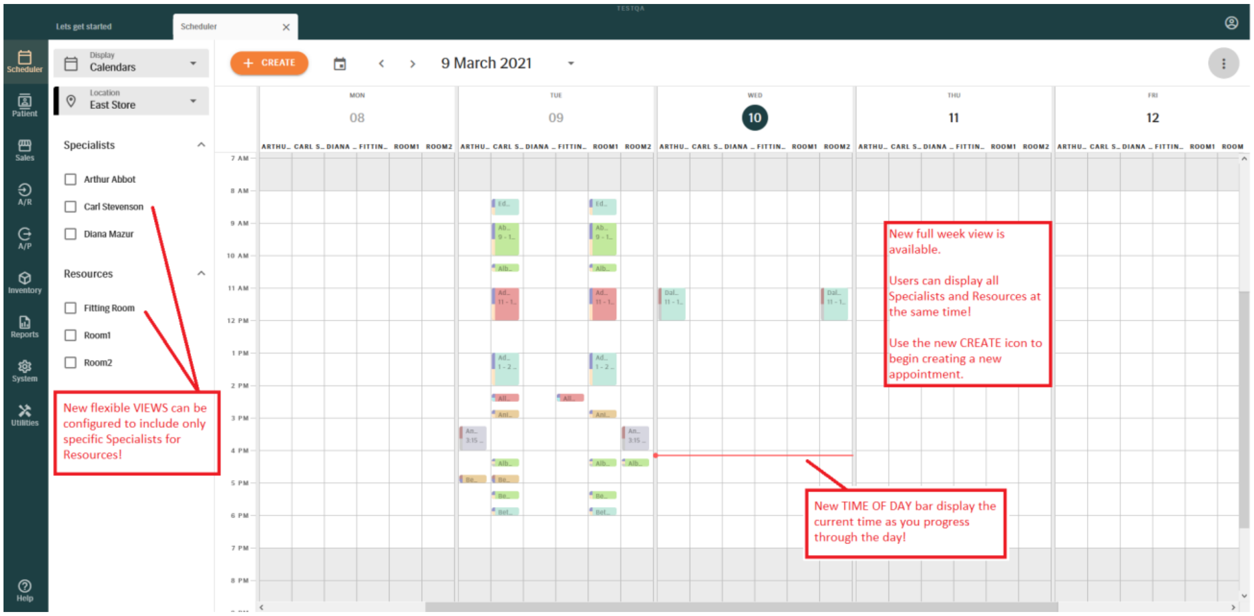
3 New Manage Scheduler

Manage 7.0.0 has been introduced with an all-new Scheduler wrapped in a sleek and modern new user interface. The new Scheduler can display a schedule for location, a specialist as well as a new option to display a schedule for a Resource such as a sound booth or a fitting room.

With a variety of new viewing options, users can select to see all appointments for a specific location, specialist, or resource in a number of different ways.

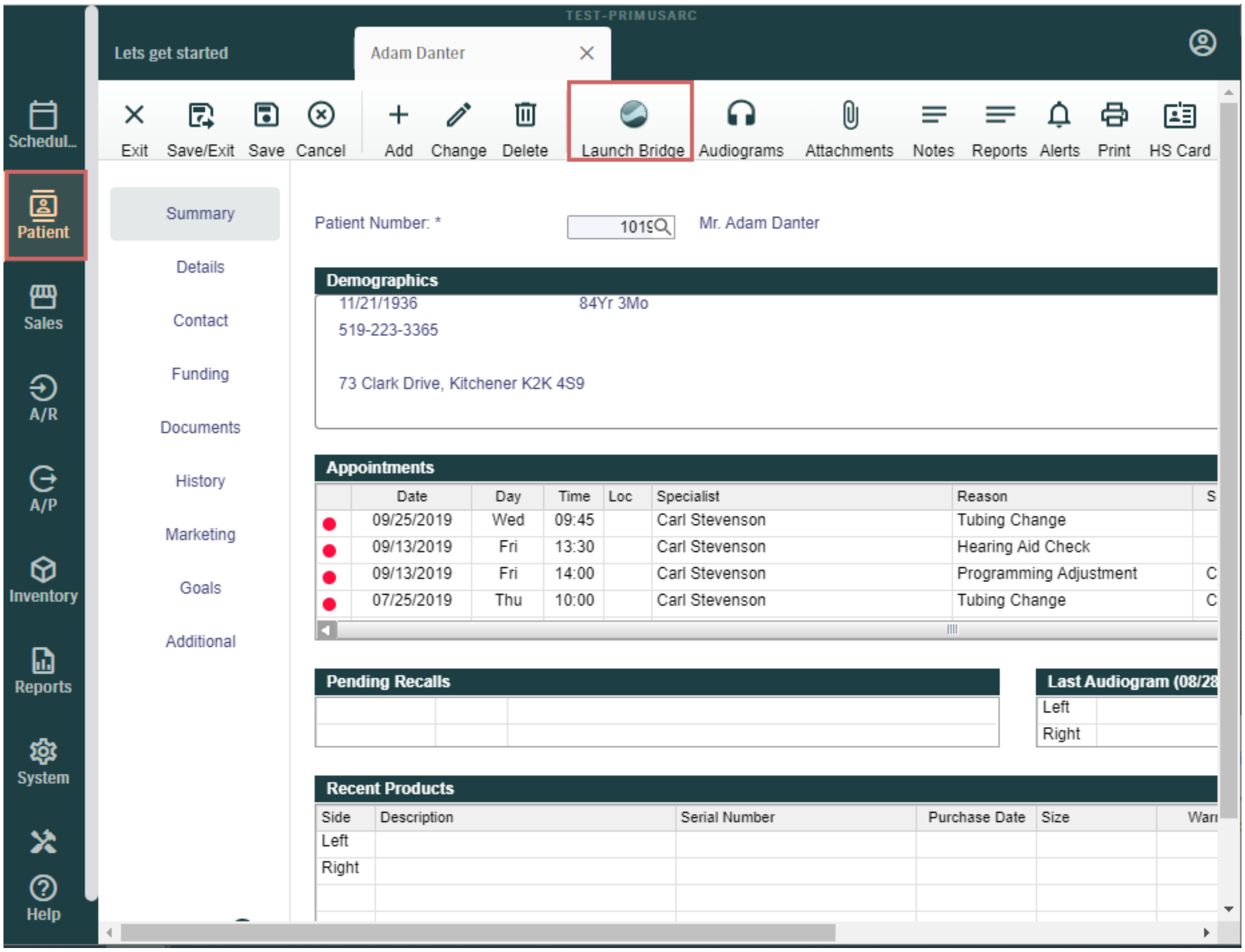


Or change their view to a full weekly view that displays all Specialist and Resources.


Lets get started
Scheduler
Display
Calendars
Location
East Store
CREATE
9 March 2021
Specialists
Arthur Abbot
Carl Stevenson
Diana Mazur
Resources
Fitting Room
Room1
Room2
New flexible VIEWS can be configured to include only specific Specialists for Resources!
New full week view is available.
Users can display all Specialists and Resources at the same time!
Use the new CREATE icon to begin creating a new appointment.
New TIME OF DAY bar display the current time as you progress through the day!

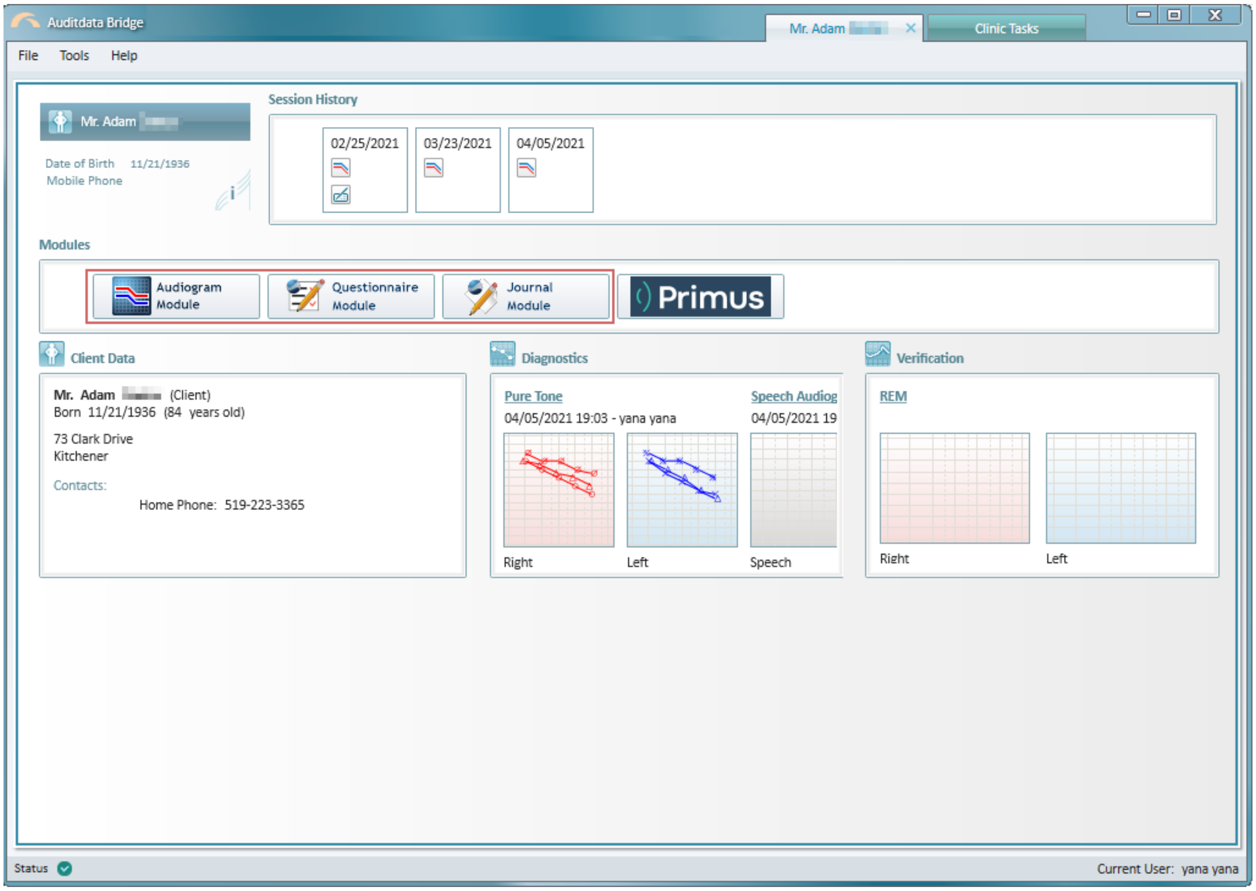
4 New Auditdata Bridge

Bridge has been added to Manage as the latest integration offering. The Bridge client allows Noah to be accessed from within Manage.



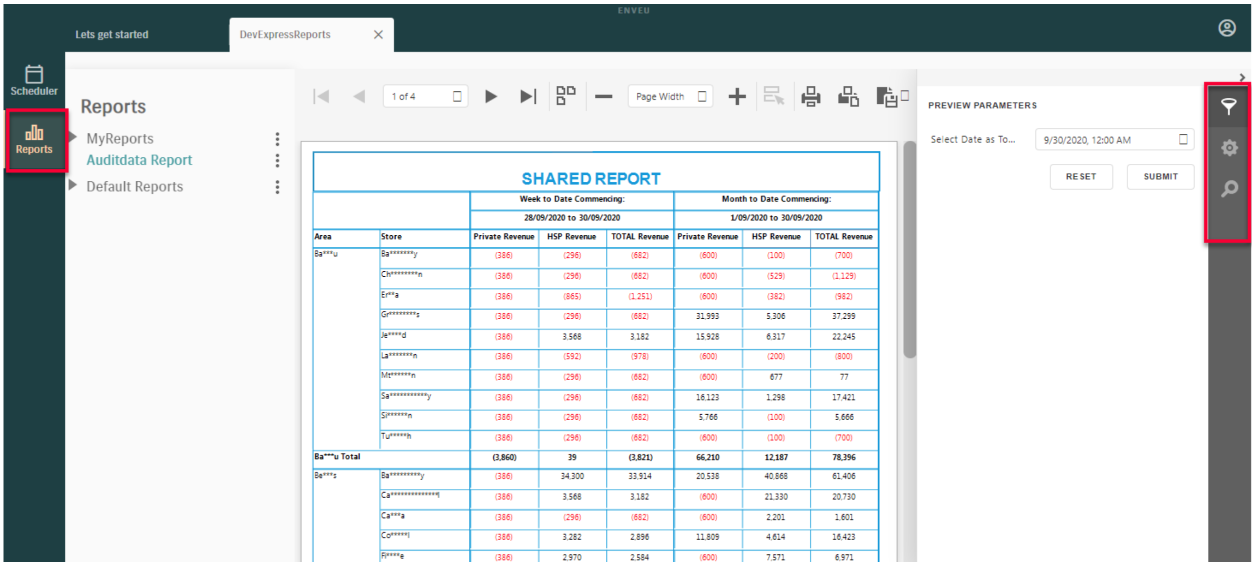
The Bridge desktop app is currently supplied with three pre-installed modules – the Audiogram module, the Journal module and the Questionnaire module.

Other module components can be installed separately.

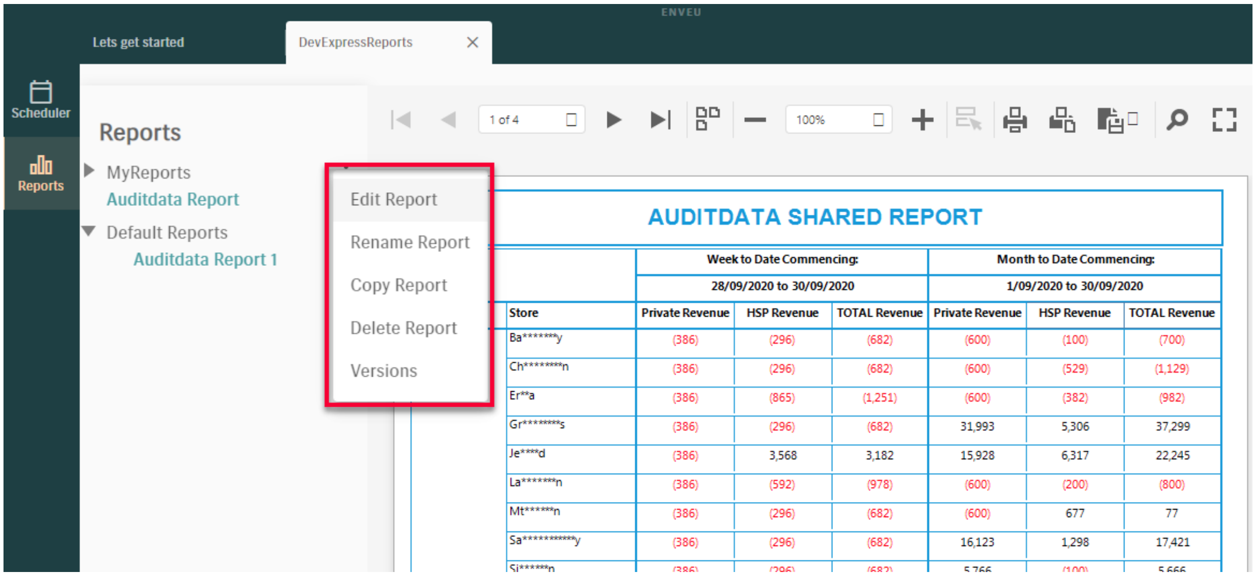

Auditdata Bridge
Mr. Adam
Clinic Tasks
File
Tools
Help
Mr. Adam
Date of Birth 11/21/1936
Mobile Phone
Session History
02/25/2021
03/23/2021
04/05/2021
Modules
Audiogram Module
Questionnaire Module
Journal Module
Primus
Client Data
Mr. Adam (Client)
Born 11/21/1936 (84 years old)
73 Clark Drive
Kitchener
Contacts:
Home Phone: 519-223-3365
Diagnostics
Pure Tone
04/05/2021 19:03 - yana yana
Speech Audiog
04/05/2021 19
Right
Left
Speech
Verification
REM
Right
Left
Status
Current User: yana yana

5 New Auditdata DevExpress Reports

New DevExpress Reports have been added to Manage, allowing users to *View and Edit* aggregated data. You can access reports using the corresponding button on left panel. The right panel contains settings for filtering and configuration.

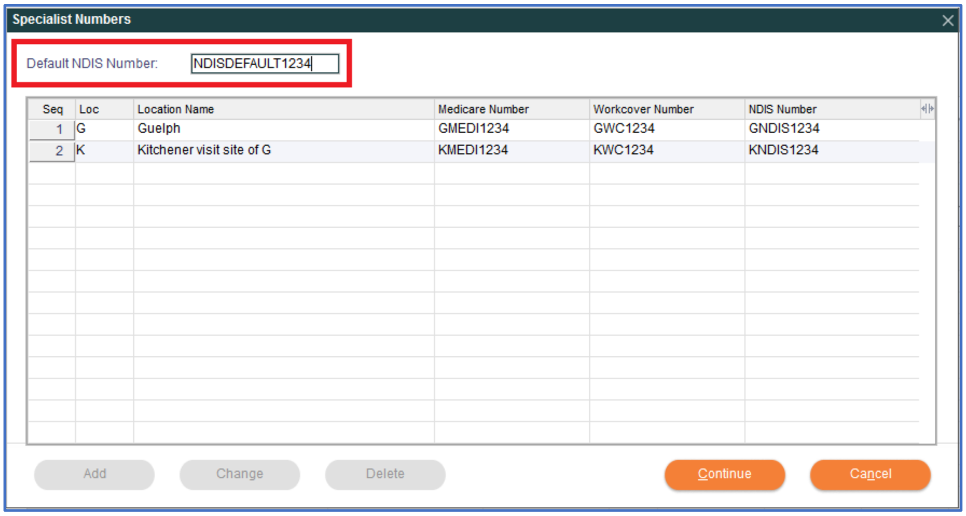


Depending on a user role, it is possible to either *View* reports or *View and Edit* them. A user granted with *View and Edit permissions* has access to the context menu.



6 New NDIS Default Number for Australian Specialists

A new DEFAULT NDIS NUMBER field has been added to our CONFIGURE SYSTEM SETTINGS > SCHEDULING > SPECIALIST maintenance screen for our Australian clinics within the NUMBERS window. This allows clinics to configure a default NDIS number for use on locations which do not have their own specially configured NDIS number.

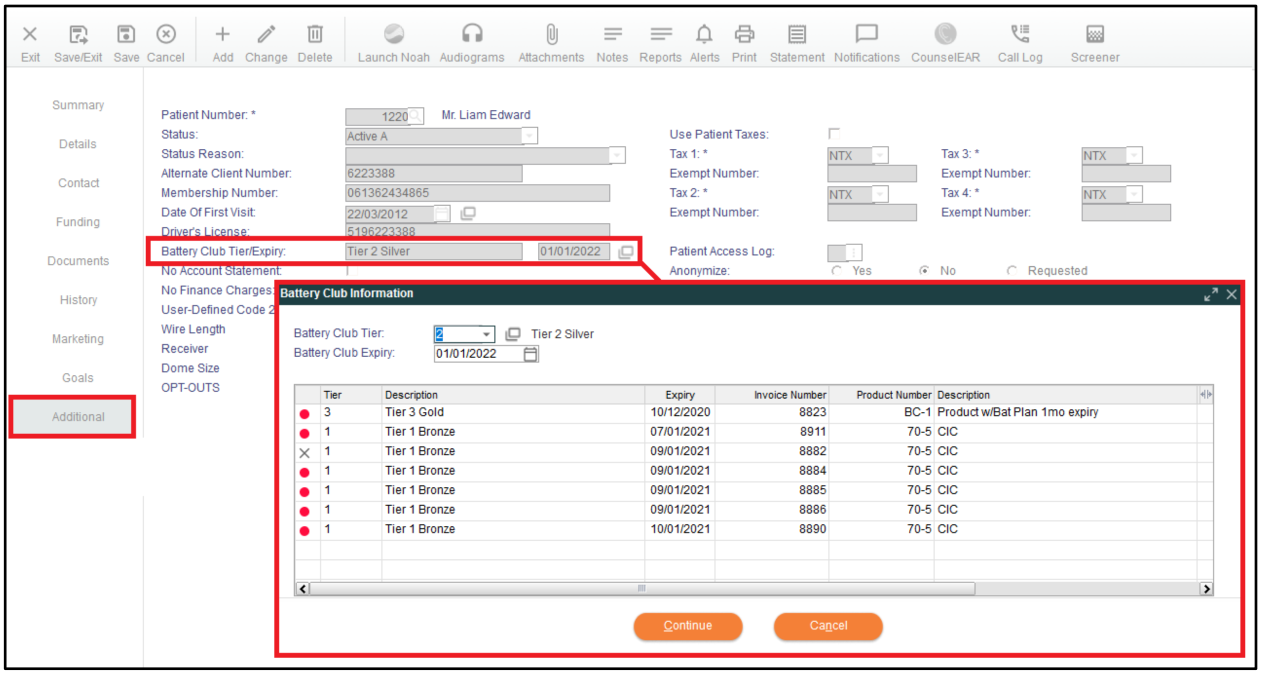


7 New and Improved Battery Club Tiers

The former Manage “Battery Club Category” process has been enhanced to our new “Battery Club Tiers” functionality which auto applies Battery Club discounts to patient files, based on invoices containing products from PRODUCT CATEGORIES which are designed to apply and expire Battery Club discounts automatically.

This means that once the Battery Club Tiers are configured, clinics no longer have to manually apply or remove Battery Club discounts to a patient file as they are automatically applied and expired.

Within PATIENT INFORMATION under the ADDITIONAL INFORMATION screen, users can see which Battery Club Tier a patient is currently on, when it expires and which sales documents triggered the Battery Club Tier. If an invoice is returned that originally applied a Battery Tier Club to a patient, then the Battery Club Tier is remove from that patient automatically as well. **



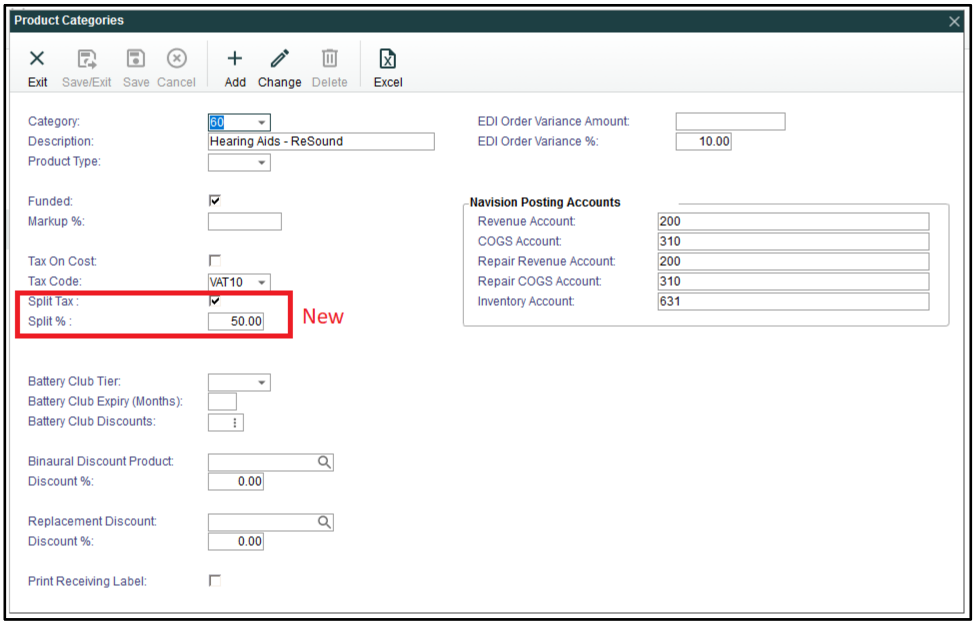
To learn more about how setting up Battery Club Tier may benefit your clinic, please contact an Auditdata Support Representative.

** Clinics who have had custom development to their PATIENT INFORMATION screen may not have the exact functionality described above.

8 New VAT Tax Split Feature for UK Clinics

A new configuration option for UK Tax Splits has been added to Manage within PRODUCT CATEGORIES.

Now our UK clinics can configure that specific PRODUCT CATEGORIES have unique VAT Tax Splits. For example, a hearing aid PRODUCT CATEGORY for example can be configured to have a 50% VAT split, which means for example that a product sold with a $1000 list price and VAT split that is calculated on only 50% or $500 of the list price.

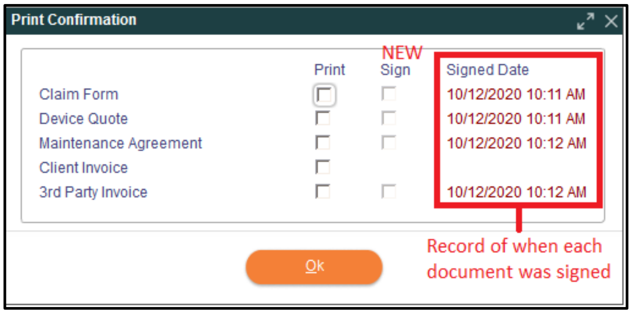


9 Enhanced HSP Claims Status Report

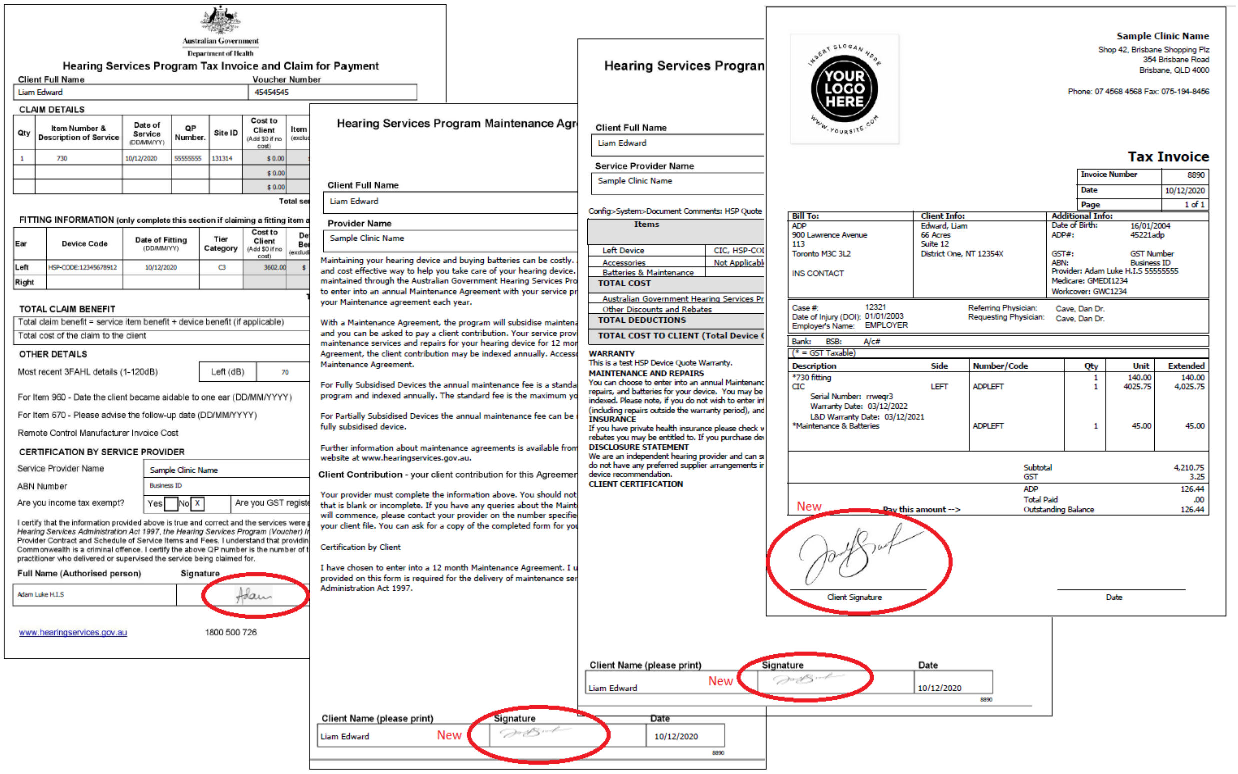
The Australian HSP CLAIMS STATUS REPORT has been enhanced by the addition of Specialists, 3FAHL Values and 3FAHL dates when exported to Excel. The Specialist shown on this report is the first populated “Practitioner” on the HSP Claim, no matter if different Practitioners are assigned to different HSP Items. If no Practitioner is listed on any HSP Items, then the “Authorized Person” on the HSP Claim will be listed as the “Specialist” on this report.

10 Additional HSP Signature Capture Options

The Australian HSP Claim has been enhanced to capture and apply patient digital signatures on not only the HSP Claim Invoice but also the Maintenance Agreement, Device Quotes and 3rd Party Invoices. Within the PRINT CONFIGURATION options for an HSP Claim, users can select to SIGN documents that apply based on the claim.



Once signed, the SIGNED DATE/TIME information is visible within the HSP Claim and prints on the selected documents.

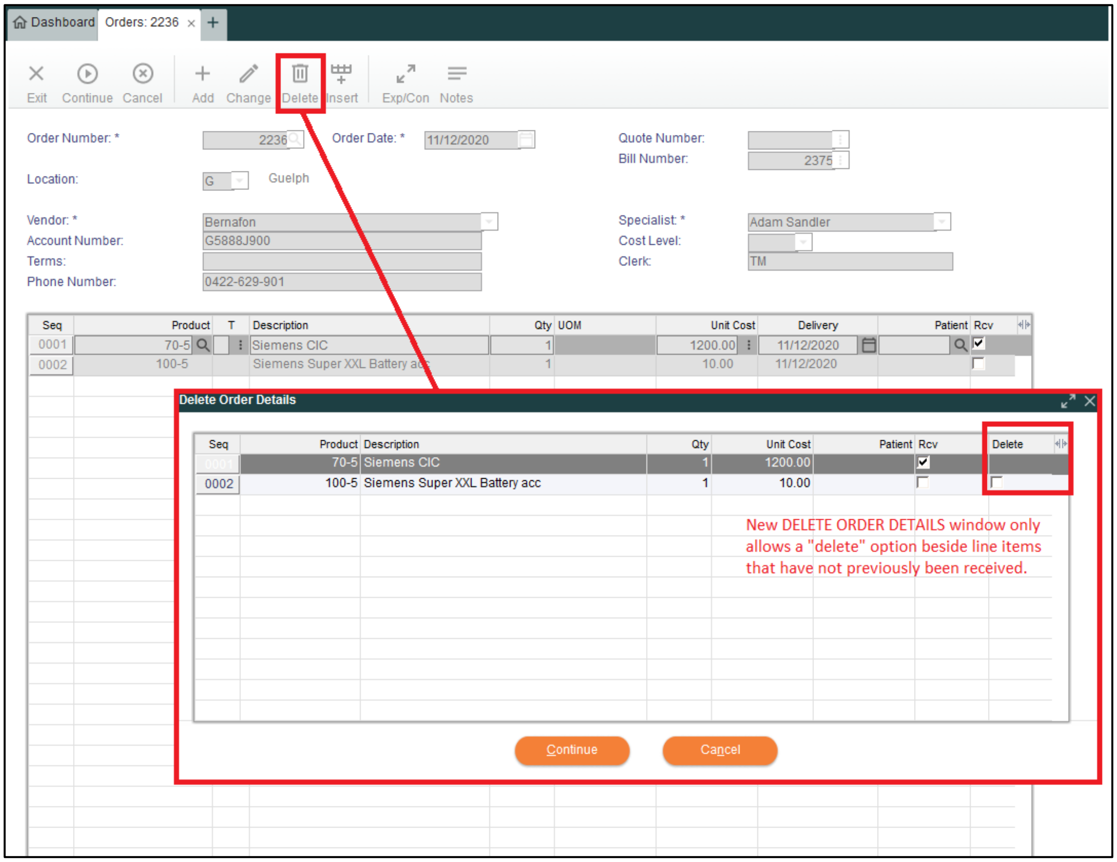


For more information on how to incorporate digital signature capture for Australian HSP Claims within your clinic, please reach out to your Auditdata Support Representative.

11 Order Line Deletion Enhancement

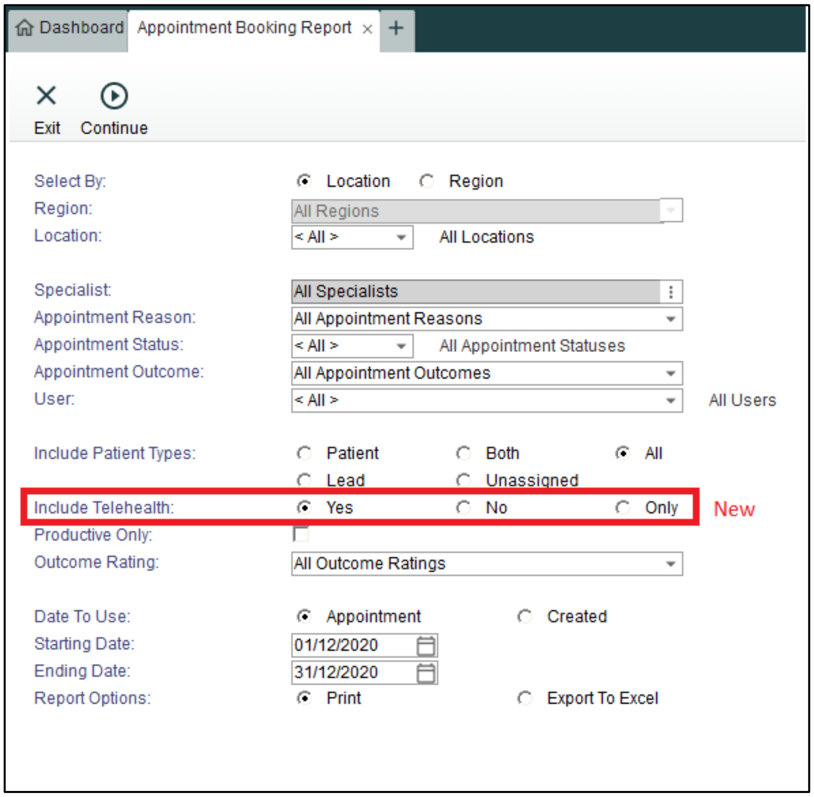
An enhancement to the ORDERS function has been introduced that prevents users from deleting order detail items that have been received. Now once an item is received into stock, a user will be prevented from deleting it from the originating order. This preserves the audit trail for ordering and receiving in general.

Now when clicking the DELETE icon within an Order, the user is presented a new DELETE ORDER DETAILS screen where only non-received line items can be deleted.



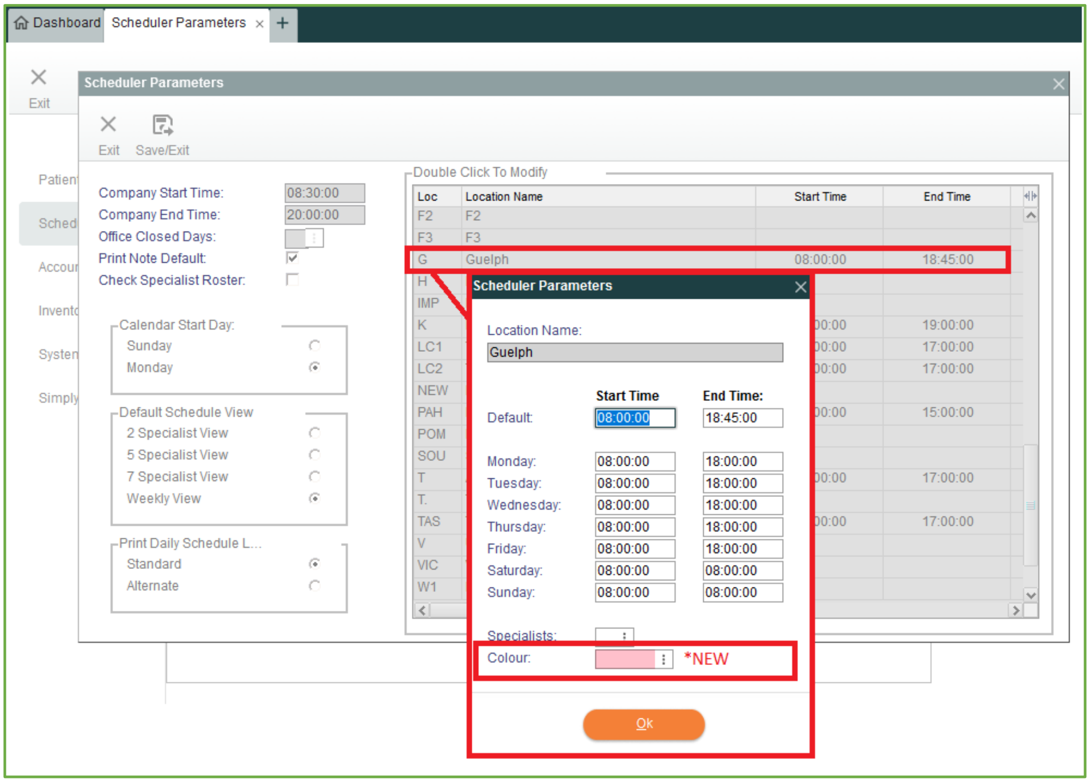
12 New Telehealth Filter Available on the Appointment Booking Report

A new filter has been added to the APPOINTMENT BOOKING REPORT that users of our Telehealth feature will appreciate. Now users can now filter to select options to include Telehealth appointments, not include Telehealth appointments or only include Telehealth appointments. The Excel output of the APPOINTMENT BOOKIN REPORT has also been enhanced with a new column of data called "TELEHEALTH" that displays "YES" if the appointment was flagged as a Telehealth appointment.



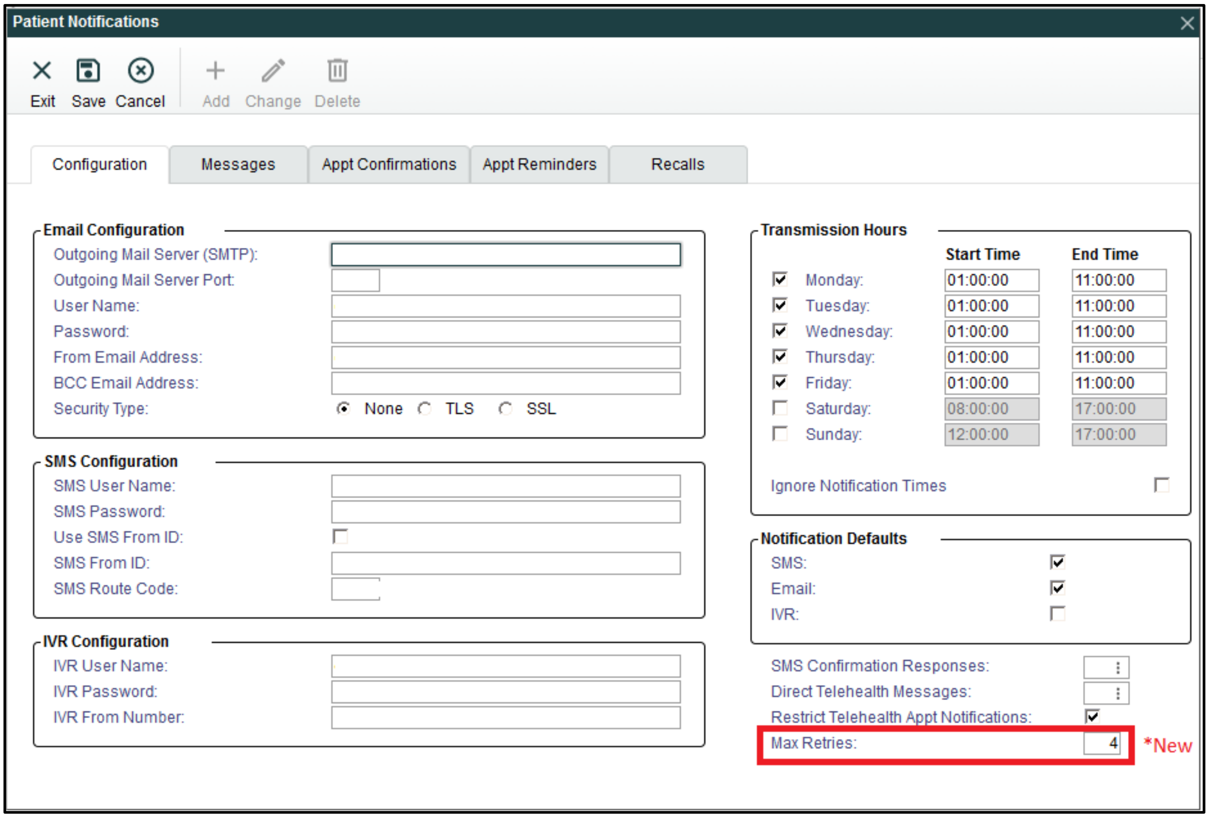
13 Colour Selection available for Locations

To support our new APPOINTMENT SCHEDULER framework, colour assignment has been added to Locations within CONFIGURE SYSTEM SETTINGS > SCHEDULER > SCHEDULER PARAMETERS. Clinics can configure locations with unique colours which will appear within the new and improved APPOINTMENT SCHEDULER.



14 New SMS Retries Configuration

Within CONFIGURE SYSTEM SETTINGS > PATIENTS > PATIENT NOTIFICATIONS clinics who utilize SMS patient notifications can indicate how many SMS retry attempts can be made before the notification will give up and stop sending. If no specific amount of SMS retries are configured, the system default of 3 will be applied.

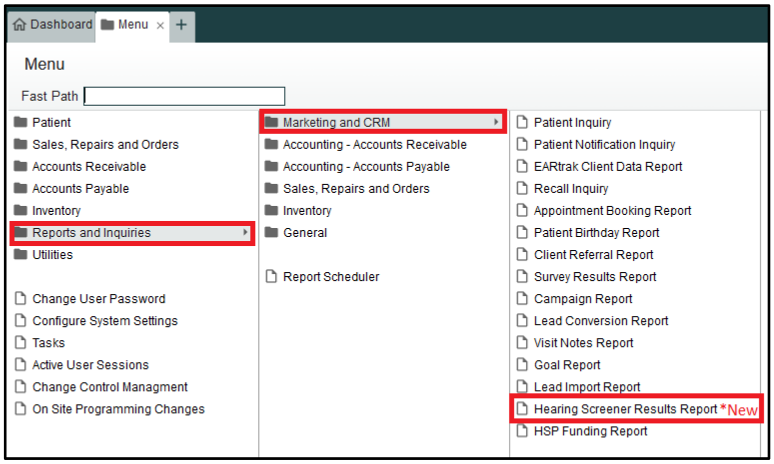


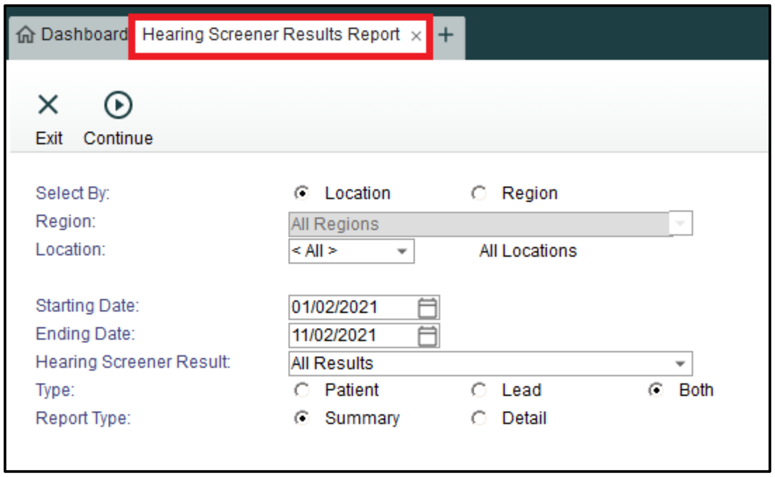
15 Hearing Screener Results Report

Within REPORTS AND INQUIRIES > MARKETING AND CRM the HEARING SCREENER RESULTS REPORT has been enhanced for clinics utilizing our Listo Screener tool to include more details on both the SUMMARY and DETAILED outputs of the report.

Left and Right test values are now adjusted based on noise correction values and these noise corrected values also carry through to the patients individual Hearing Screener Report as well.

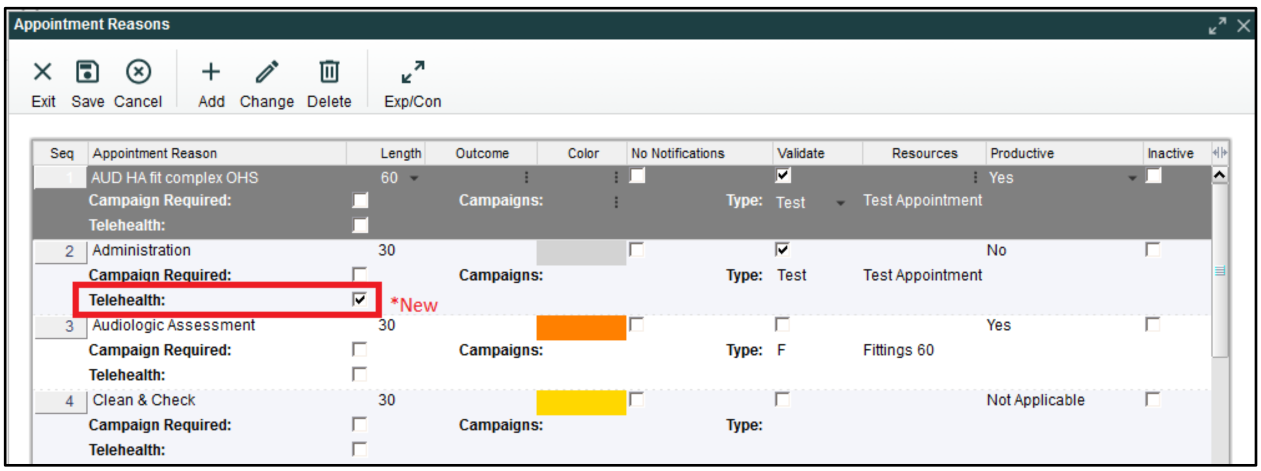
Please contact your Auditdata representative to learn more about the Listo Screener tool.





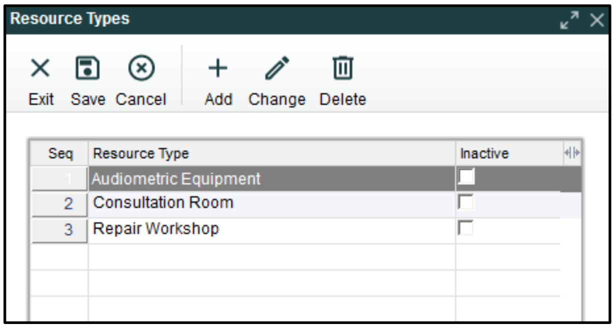
16 New Appointment Reason Telehealth Verification

A new parameter within CONFIGURE SYSTEM SETTINGS > SCHEDULING > APPOINTMENT REASONS has been added to benefit our clinics who utilize our TELEHEALTH feature that indicates whether an Appointment Reason is valid for Telehealth configured appointments. When a user indicates they wish to configure that an appointment is Telehealth, a validation will occur that ensures the APPOINTMENT REASON selected is actually valid for a Telehealth appointment. For example, configuring that a Fitting appointment is not suitable for Telehealth will prevent a user from selecting that a Fitting type appointment will be a Telehealth appointment.

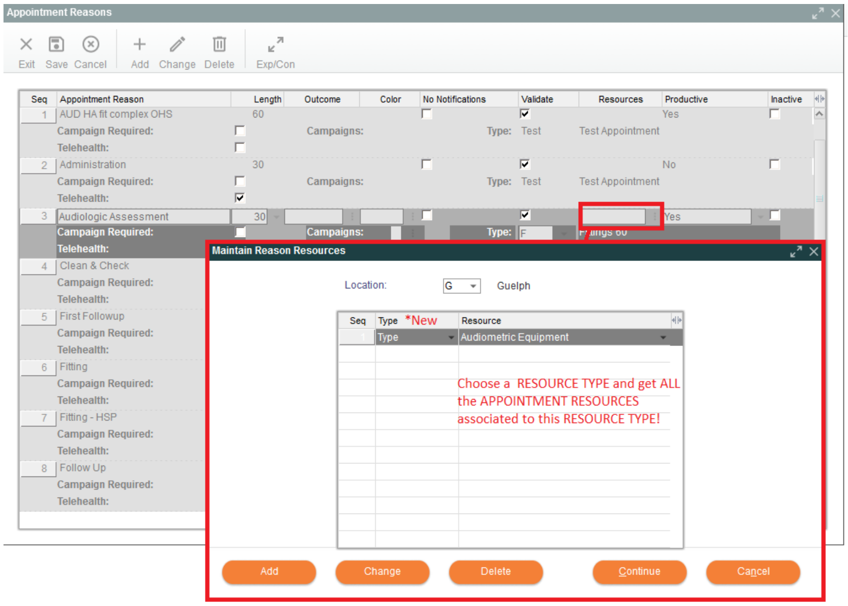


17 New Resource Types Available

A new configuration setting for clinic resource management has been added to CONFIGURE SYSTEM SETTINGS > SCHEDULING called RESOURCE TYPES. The new RESOURCE TYPES has been added to allow clinics to define a single type of resource. For example, clinics can add a RESOURCE TYPE such as "Sound Booths" and configure that within APPOINTMENT RESOURCES that "Sound Booth #1" and "Sound Booth #2" resources configured to RESOURCE TYPE "Sound Booths". This will significantly reduce the amount of time needed to configure that an APPOINTMENT REASON with a validation tied to "Sound Booths" instead of having to itemize each and every sound booth individually.



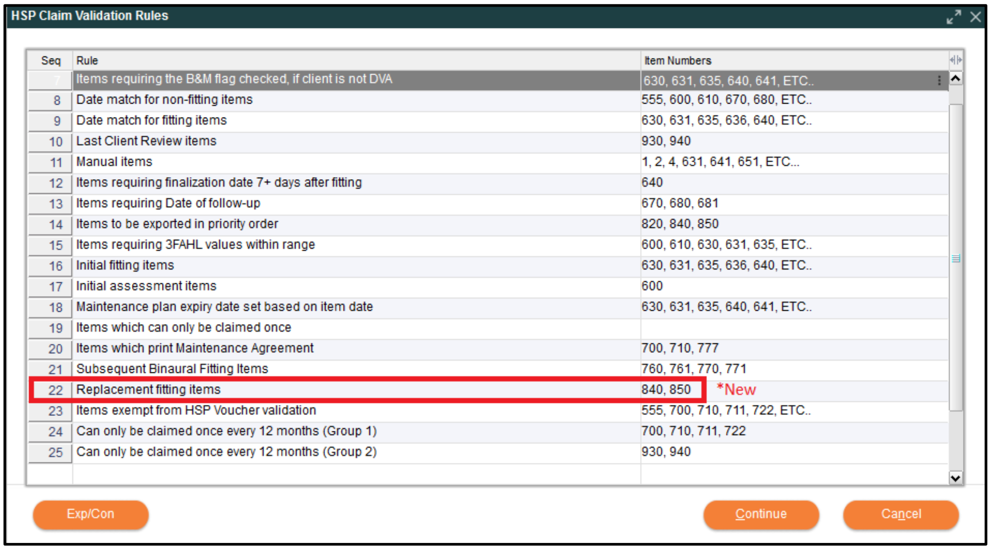
Within CONFIGURE SYSTEM SETTINGS > SCHEDULING > APPOINTMENT REASONS clinic can associate a RESOURCE TYPE to an APPOINTMENT REASON.



To see this new RESOURCE TYPES configuration screen, please be sure to set the proper security settings within CONFIGURE SYSTEM SETTINGS > SYSTEM > SECURITY ROLES for the new menu option.

18 HSP Replacement Fitting Dates

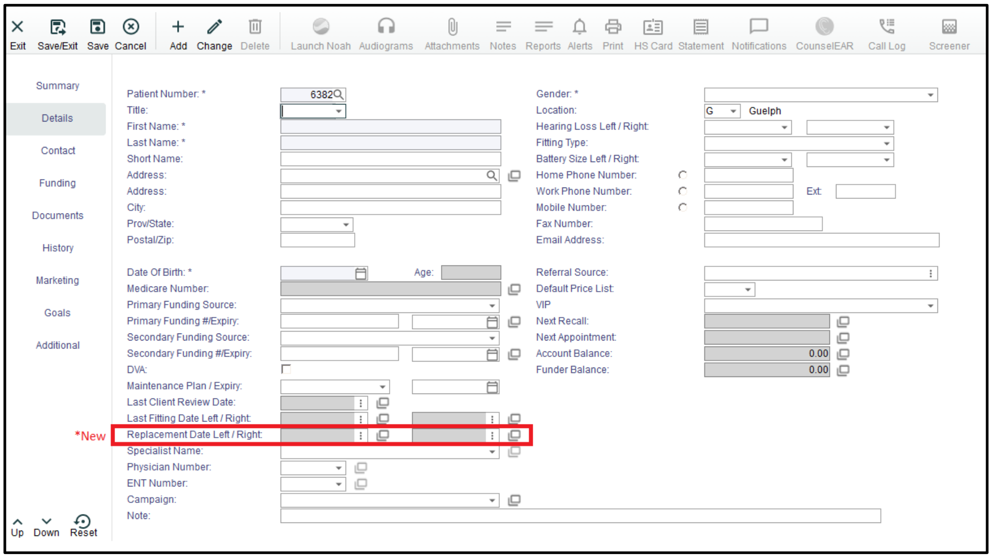
Our Australian clinics will notice a new HSP Validation Rule called “Replacement Fitting Items” that can be configured as belonging to HSP Item Numbers 840 and 850.


HSP Claim Validation Rules

Seq	Rule	Item Numbers
7	Items requiring the B&M flag checked, if client is not DVA	630, 631, 635, 640, 641, ETC..
8	Date match for non-fitting items	555, 600, 610, 670, 680, ETC..
9	Date match for fitting items	630, 631, 635, 636, 640, ETC..
10	Last Client Review items	930, 940
11	Manual items	1, 2, 4, 631, 641, 651, ETC...
12	Items requiring finalization date 7+ days after fitting	640
13	Items requiring Date of follow-up	670, 680, 681
14	Items to be exported in priority order	820, 840, 850
15	Items requiring 3FAHL values within range	600, 610, 630, 631, 635, ETC..
16	Initial fitting items	630, 631, 635, 636, 640, ETC..
17	Initial assessment items	600
18	Maintenance plan expiry date set based on item date	630, 631, 635, 640, 641, ETC..
19	Items which can only be claimed once	
20	Items which print Maintenance Agreement	700, 710, 777
21	Subsequent Binaural Fitting Items	760, 761, 770, 771
22	Replacement fitting items	840, 850 *New
23	Items exempt from HSP Voucher validation	555, 700, 710, 711, 722, ETC..
24	Can only be claimed once every 12 months (Group 1)	700, 710, 711, 722
25	Can only be claimed once every 12 months (Group 2)	930, 940

Exp/Con Continue Cancel

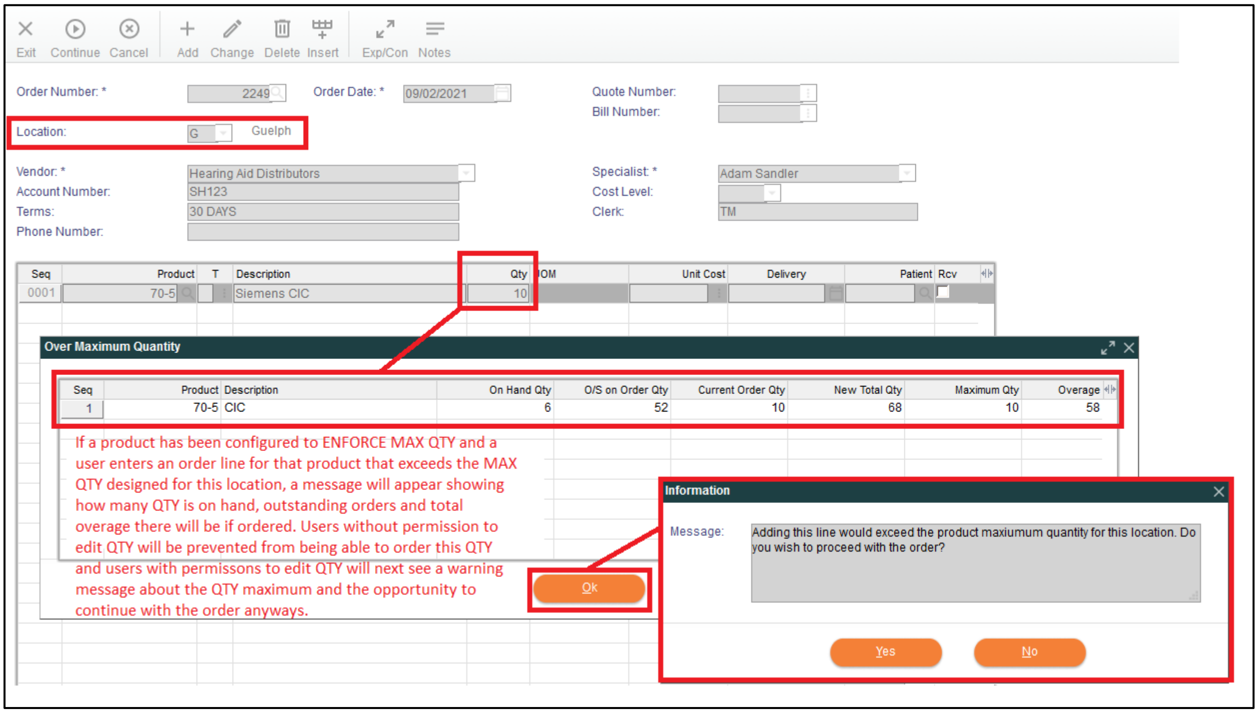
If configured, and an HSP Claim containing HSP Items 840 or 850 is created for a Patient, the PATIENT INFORMATION screen will display the hearing aid device date for the Replacement Fitting device under the LEFT or RIGHT Replacement fields below.



The new REPLACEMENT DATE LEFT and RIGHT fields are also searchable within the PATIENT INQUIRY tool.

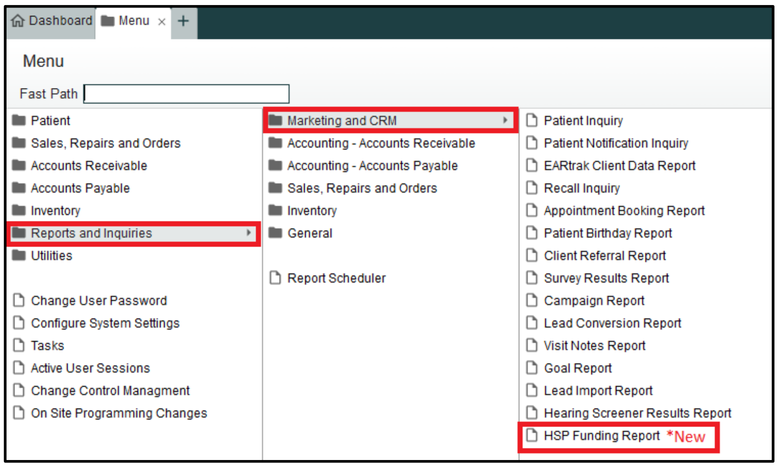
19 Enforce Order Maximums

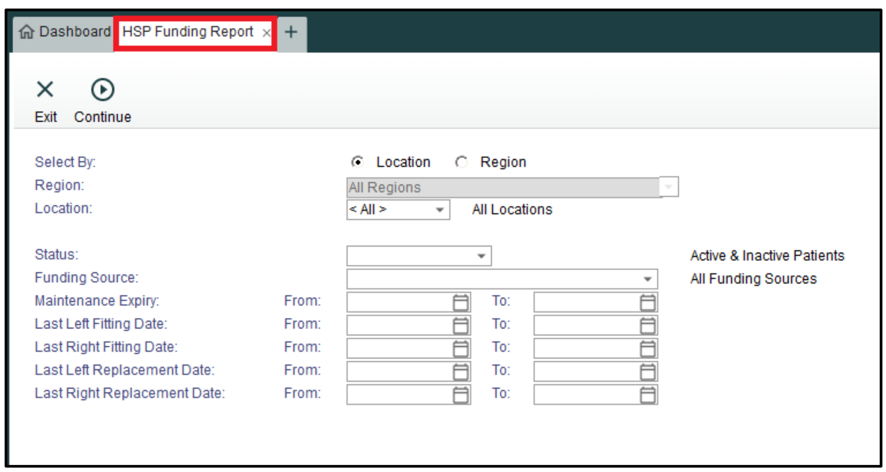
An enhancement has been made to product configuration within PRODUCT INFORMATION that allows clinics to enforce that any product can only have so many in stock and on order. Essentially configuring a products maximum order will ensure that clinics never order more then a predeterimined amount of product.



20 New HSP Funding Report

A new report for our Australian clinics has been added to the REPORTS AND INQUIRIES > MARKETING AND CRM menu that allows clinics to retrieve a list of patients based on selection criteria such as last fitting dates, replacement dates and maintenance expiry dates. As always, access to this HSP FUNDING REPORT is controlled via SECURITY ROLE menu permissions.

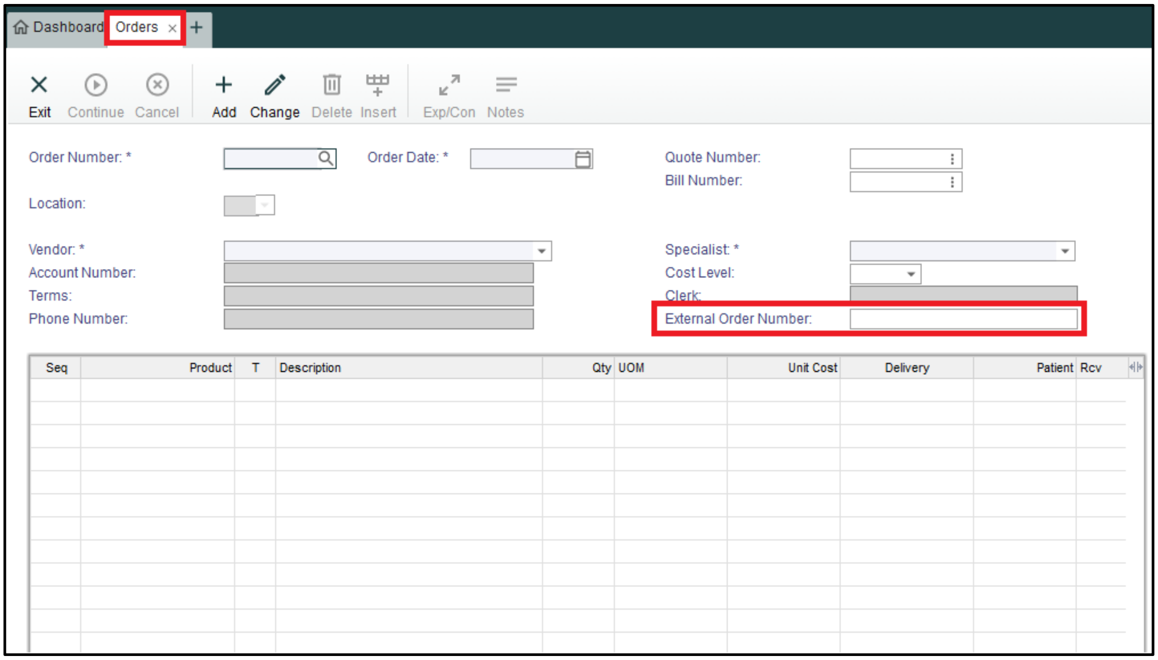




21 New External Order Number on Orders

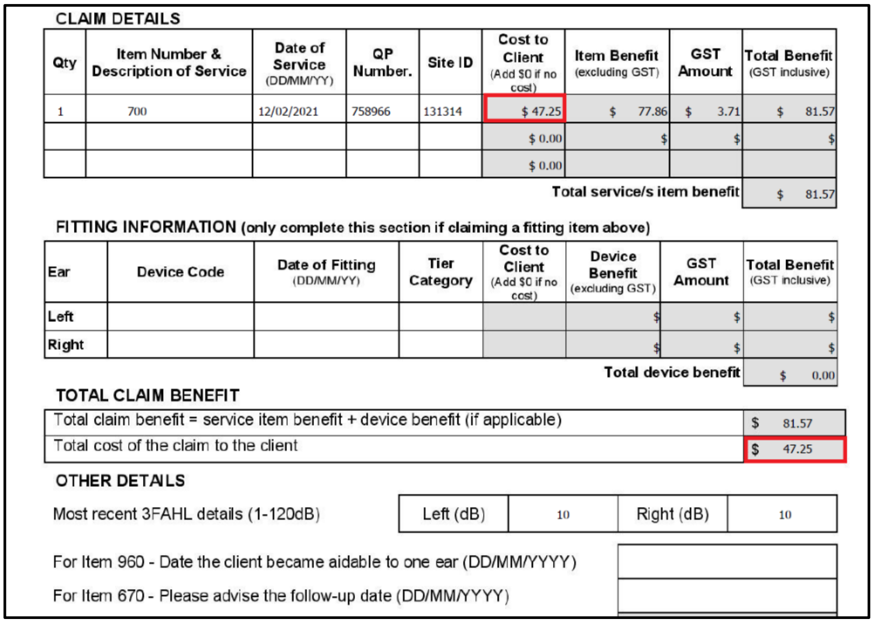
There has been a new field labeled "External Order Number" added to the ORDERS and RETURN ORDER screens. This allows clinics to track an external order number within an ORDER/ RETURN ORDER. This new alphanumeric input field will also print on the Order.

Users can also indicate that this field is mandatory for an Vendor within VENDOR INFORMATION as well to ensure that users are entering this information on Orders.



22 New HSP Claim Form Enhancement

An enhancement has been made to the Australian HSP Claim Form that makes the itemization of the “client cost” for patients easier to understand. Now when a user clicks the “I Have/Will Pay For The Provider For Services” box, the printed HSP Claim Form will display the Maintenance Agreement cost in the first non-fitting line item as show below as well as in the “Total cost of the claim to the client” section.



CLAIM DETAILS

Qty	Item Number & Description of Service	Date of Service (DD/MM/YY)	QP Number.	Site ID	Cost to Client (Add $0 if no cost)	Item Benefit (excluding GST)	GST Amount	Total Benefit (GST inclusive)
1	700	12/02/2021	758966	131314	$ 47.25	$ 77.86	$ 3.71	$ 81.57
					$ 0.00	$	$	$
					$ 0.00			
							Total service/s item benefit	$ 81.57

FITTING INFORMATION (only complete this section if claiming a fitting item above)

Ear	Device Code	Date of Fitting (DD/MM/YY)	Tier Category	Cost to Client (Add $0 if no cost)	Device Benefit (excluding GST)	GST Amount	Total Benefit (GST inclusive)
Left					$	$	$
Right					$	$	$
						Total device benefit	$ 0.00

TOTAL CLAIM BENEFIT

Total claim benefit = service item benefit + device benefit (if applicable)	$ 81.57
Total cost of the claim to the client	$ 47.25

OTHER DETAILS

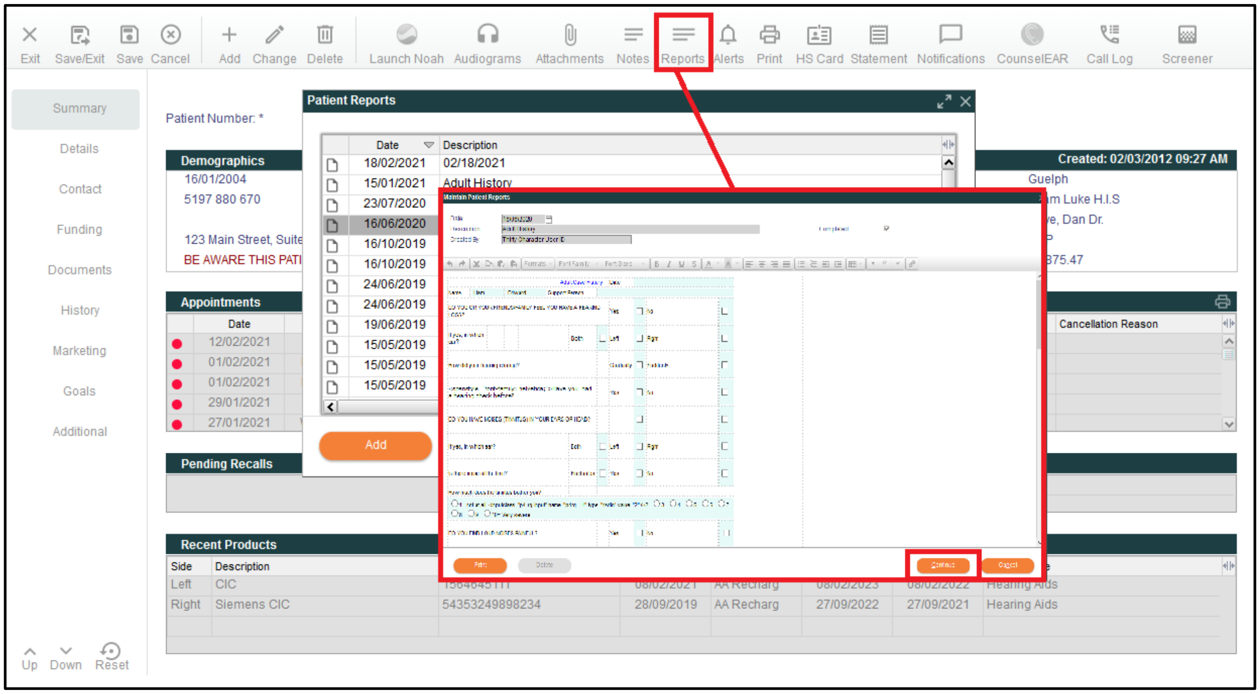
Most recent 3FAHL details (1-120dB)	Left (dB)	10	Right (dB)	10

For Item 960 - Date the client became aidable to one ear (DD/MM/YYYY)

For Item 670 - Please advise the follow-up date (DD/MM/YYYY)

23 New Reports enhancement available within the Patient Information Screen

The REPORTS screen within the PATIENT INFORMATION has been enhanced to commit Reports entered within the REPORTS function to the database immediately when the users clicks CONTINUE, instead of saving the Report when entire patient file is saved. This will lower the chance of losing Reports when the patient file is exited without being saved.



24 New Appointment Resource Templates

A new configuration options for APPOINTMENT RESOURCE TEMPLATES has been added to the CONFIGURE SYSTEM SETTINGS > SCHEDULING menu that allows users the additional option to indicate that an APPOINTMENT REASON can use more then one resource. For example, within the period of time allocated to an APPOINTMENT REASON, you can create a template that indicates a portion of the APPOINTMENT REASON time uses one resource in the clinic, and the balance of that APPOINTMENT REASON time uses another appointment reason.

This new configuration option for RESOURCE TEMPLATES is only utilized with our new Manage UI and the new SCHEDULER which includes new functionality based on being a resource based scheduler. Clinics who have not migrated to our new Manage 7 framework will not be able to access this menu option.