

Manage

What's New

Version 7.0.0



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 7.0.0.

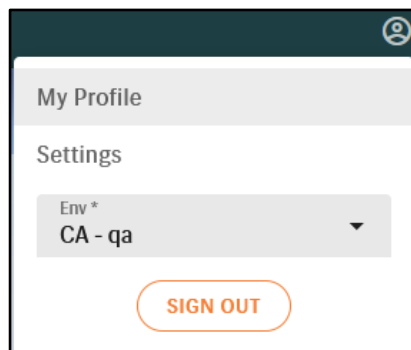
A variety of new functionality and a new suite of Auditdata tools that are now available within our Manage 7.0.0 release. This document will introduce our new Manage Scheduler, Primus Bridge, DevExpress Reports and new identity service user creation tool.

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.

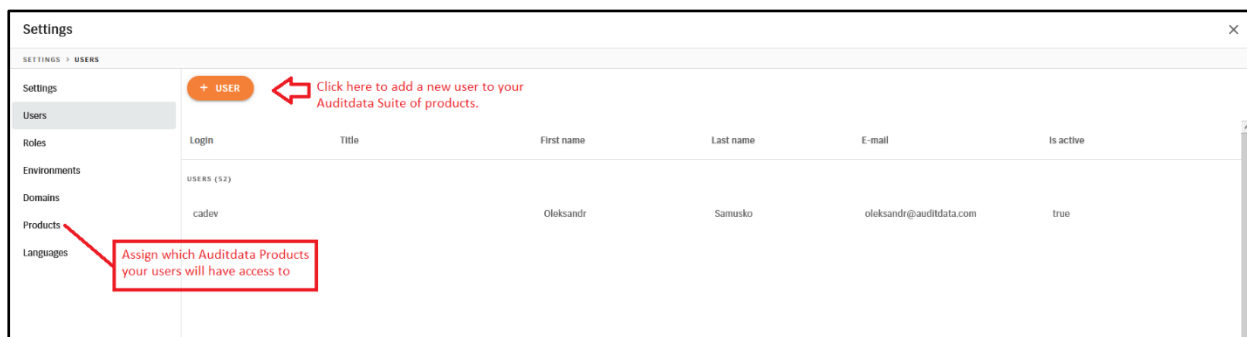
2 Manage – Add Users

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.



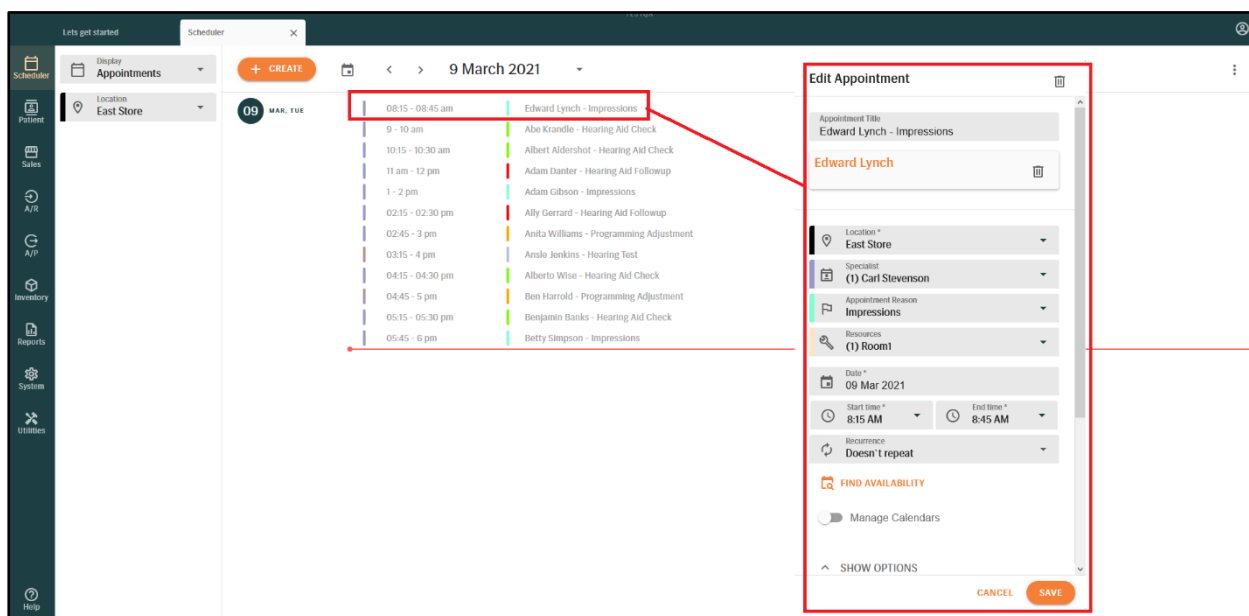
Within SETTINGS, organizations can control all new and existing user permissions and the products and environments each user has access to.



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.



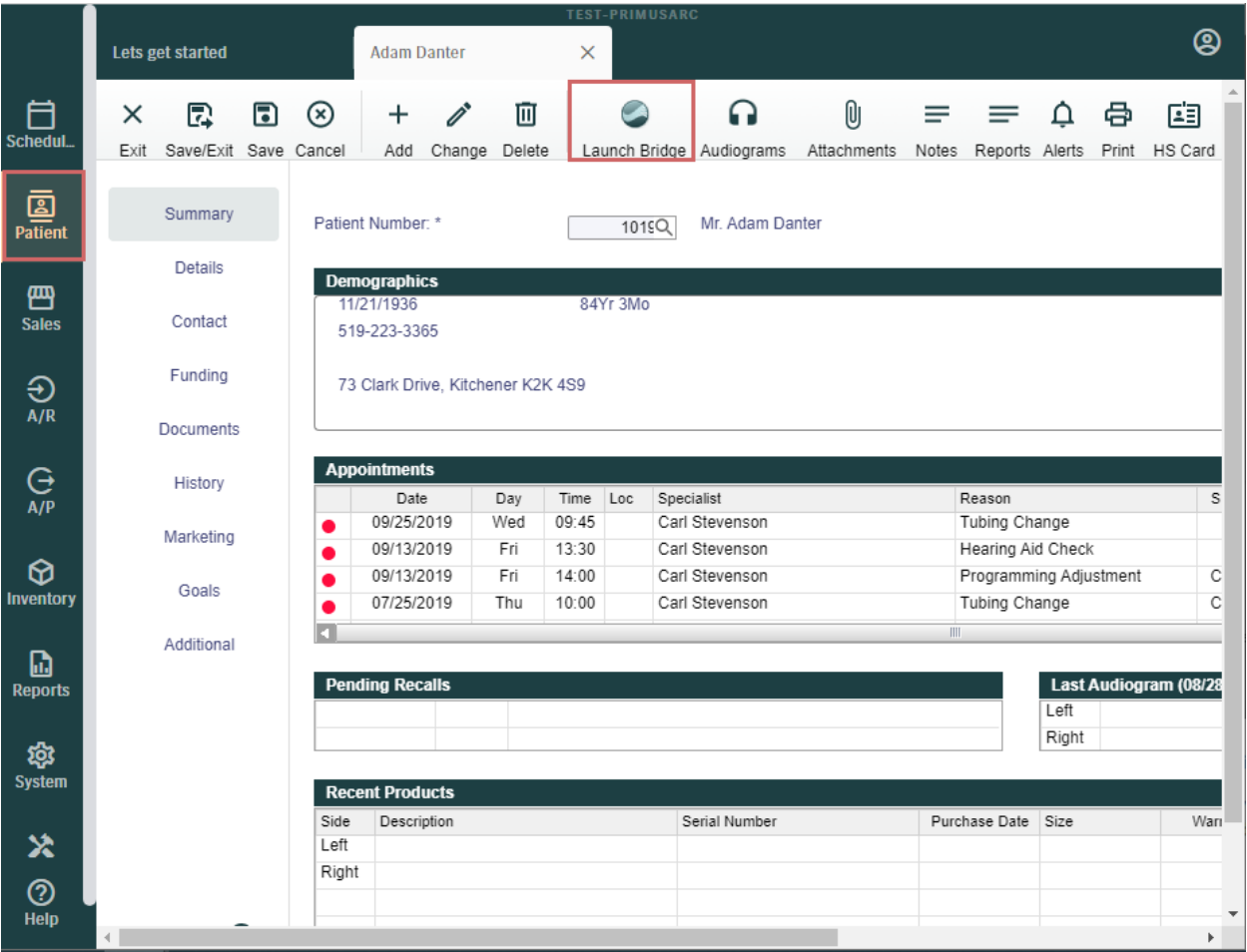
Or change their view to a full weekly view that displays all Specialist and Resources.

The screenshot displays the 'Scheduler' interface in Manage 7.0.0. The interface includes a sidebar on the left with navigation icons for Scheduler, Calendars, Location, Specialists, Resources, Fitting Room, Room1, Room2, Reports, System, Utilities, and Help. The main area shows a weekly calendar view for March 9th, 2021, with columns for Monday (08), Tuesday (09), Wednesday (10), Thursday (11), and Friday (12). The time slots range from 7 AM to 8 PM. A 'CREATE' button is visible at the top. Three red callout boxes highlight new features:

- Callout 1 (left sidebar):** "New flexible VIEWS can be configured to include only specific Specialists for Resources!" (points to the Specialists list).
- Callout 2 (top right):** "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." (points to the 'CREATE' button).
- Callout 3 (bottom right):** "New TIME OF DAY bar display the current time as you progress through the day!" (points to the time bar at the bottom of the calendar grid).

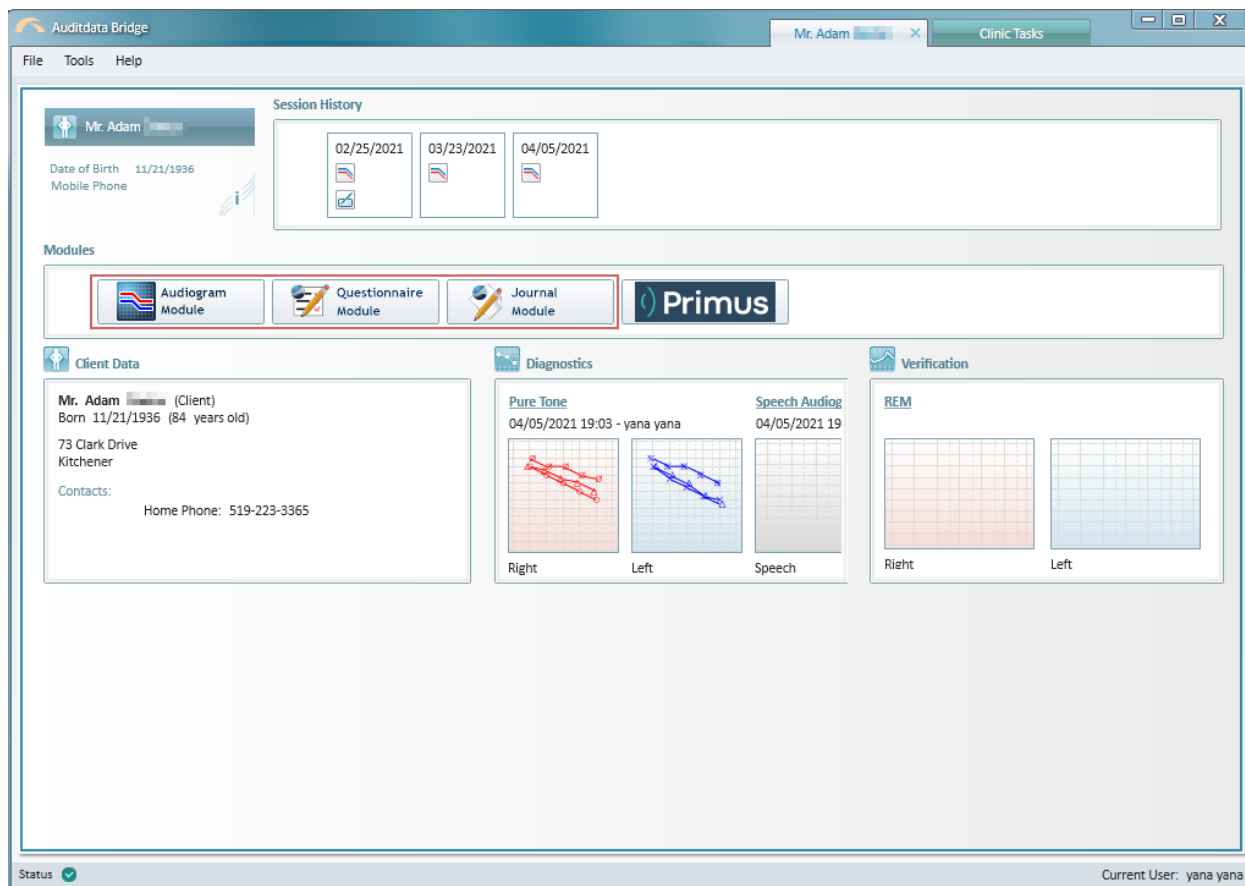
4 New Auditdata Bridge

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.



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.

The screenshot shows the 'DevExpressReports' window. On the left, a sidebar contains 'Scheduler' and 'Reports' sections. The 'Reports' section is expanded, showing 'MyReports', 'Auditdata Report', and 'Default Reports'. The main area displays a 'SHARED REPORT' table. The table has columns for 'Area', 'Store', 'Private Revenue', 'HSP Revenue', and 'TOTAL Revenue'. It is divided into two sections: 'Week to Date Commencing: 28/09/2020 to 30/09/2020' and 'Month to Date Commencing: 1/09/2020 to 30/09/2020'. The right panel shows 'PREVIEW PARAMETERS' with a date selector and 'RESET' and 'SUBMIT' buttons. A red box highlights the 'Reports' button in the sidebar and the 'PREVIEW PARAMETERS' section on the right.

Area	Store	Week to Date Commencing: 28/09/2020 to 30/09/2020			Month to Date Commencing: 1/09/2020 to 30/09/2020		
		Private Revenue	HSP Revenue	TOTAL Revenue	Private Revenue	HSP Revenue	TOTAL Revenue
Ba*****	Ba*****	(386)	(296)	(682)	(600)	(100)	(700)
Ch*****n	Ch*****n	(386)	(296)	(682)	(600)	(529)	(1,129)
Er**a	Er**a	(386)	(865)	(1,251)	(600)	(382)	(982)
G*****s	G*****s	(386)	(296)	(682)	31,993	5,306	37,299
Je*****d	Je*****d	(386)	3,568	3,182	15,928	6,317	22,245
La*****n	La*****n	(386)	(592)	(978)	(600)	(200)	(800)
M*****n	M*****n	(386)	(296)	(682)	(600)	677	77
Sa*****ny	Sa*****ny	(386)	(296)	(682)	16,123	1,298	17,421
Sj*****n	Sj*****n	(386)	(296)	(682)	5,766	(100)	5,666
T*****h	T*****h	(386)	(296)	(682)	(600)	(100)	(700)
Ba***u Total		(3,860)	39	(3,821)	66,210	12,187	78,396
Se****s	Ba*****ny	(386)	34,300	33,914	20,538	40,868	61,406
	Ch*****n	(386)	3,568	3,182	(600)	21,330	20,730
	Er**a	(386)	(296)	(682)	(600)	2,201	1,601
	Co*****j	(386)	3,282	2,896	11,809	4,614	16,423
	Ho*****g	(386)	2,970	2,584	(600)	7,571	6,971

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.

The screenshot shows the 'DevExpressReports' window with a context menu open over the 'Auditdata Report'. The menu options are: 'Edit Report', 'Rename Report', 'Copy Report', 'Delete Report', and 'Versions'. The main area displays an 'AUDITDATA SHARED REPORT' table, which is a subset of the data shown in the first screenshot. The right panel shows 'PREVIEW PARAMETERS' with a date selector and 'RESET' and 'SUBMIT' buttons. A red box highlights the 'Reports' button in the sidebar and the context menu.

Store	Week to Date Commencing: 28/09/2020 to 30/09/2020			Month to Date Commencing: 1/09/2020 to 30/09/2020		
	Private Revenue	HSP Revenue	TOTAL Revenue	Private Revenue	HSP Revenue	TOTAL Revenue
Ba*****ny	(386)	(296)	(682)	(600)	(100)	(700)
Ch*****n	(386)	(296)	(682)	(600)	(529)	(1,129)
Er**a	(386)	(865)	(1,251)	(600)	(382)	(982)
G*****s	(386)	(296)	(682)	31,993	5,306	37,299
Je*****d	(386)	3,568	3,182	15,928	6,317	22,245
La*****n	(386)	(592)	(978)	(600)	(200)	(800)
M*****n	(386)	(296)	(682)	(600)	677	77
Sa*****ny	(386)	(296)	(682)	16,123	1,298	17,421
Sj*****n	(386)	(296)	(682)	5,766	(100)	5,666

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.

[illegible]

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. **

The screenshot shows the 'Patient Information' screen with the 'Additional' tab selected. The 'Battery Club Tier/Expiry' field is highlighted with a red box. A pop-up window titled 'Battery Club Information' is open, showing the current tier (Tier 2 Silver) and a list of invoices that triggered the tier.

Tier	Description	Expiry	Invoice Number	Product Number	Description
3	Tier 3 Gold	10/12/2020	8823	BC-1	Product w/Bat Plan 1mo expiry
1	Tier 1 Bronze	07/01/2021	8911	70-5	CIC
1	Tier 1 Bronze	09/01/2021	8882	70-5	CIC
1	Tier 1 Bronze	09/01/2021	8884	70-5	CIC
1	Tier 1 Bronze	09/01/2021	8885	70-5	CIC
1	Tier 1 Bronze	09/01/2021	8886	70-5	CIC
1	Tier 1 Bronze	10/01/2021	8890	70-5	CIC

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.

The screenshot shows the 'Product Categories' configuration window. The 'Split Tax' checkbox is checked, and the 'Split %' is set to 50.00. A red box highlights these fields, and a red 'New' label is placed next to the 'Split %' field. The window also displays other configuration options like 'Category', 'Description', 'Product Type', 'Funded', 'Markup %', 'Tax On Cost', 'Tax Code', 'EDI Order Variance Amount', 'EDI Order Variance %', 'Navision Posting Accounts', 'Battery Club Tier', 'Battery Club Expiry (Months)', 'Battery Club Discounts', 'Binaural Discount Product', 'Discount %', 'Replacement Discount', 'Discount %', and 'Print Receiving Label'.

Navision Posting Accounts	
Revenue Account:	200
COGS Account:	310
Repair Revenue Account:	200
Repair COGS Account:	310
Inventory Account:	631

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.

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.

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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.

Order Number: * 2236 Order Date: * 11/12/2020 Quote Number: Bill Number: 2375

Location: G Guelph

Vendor: * Bernafon Account Number: G5888J900 Terms: Phone Number: 0422-629-901

Specialist: * Adam Sandler Cost Level: Clerk: TM

Seq	Product	T	Description	Qty	UOM	Unit Cost	Delivery	Patient	Rcv
0001	70-5		Siemens CIC	1		1200.00	11/12/2020		<input checked="" type="checkbox"/>
0002	100-5		Siemens Super XXL Battery acc	1		10.00	11/12/2020		<input type="checkbox"/>

Delete Order Details

Seq	Product	Description	Qty	Unit Cost	Patient	Rcv	Delete
	70-5	Siemens CIC	1	1200.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>
0002	100-5	Siemens Super XXL Battery acc	1	10.00		<input type="checkbox"/>	<input type="checkbox"/>

New DELETE ORDER DETAILS window only allows a "delete" option beside line items that have not previously been received.

Continue Cancel

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.

The screenshot shows the 'Appointment Booking Report' filter interface. The 'Include Telehealth' filter is highlighted with a red box, showing options: Yes (selected), No, and Only. A red 'New' label is next to the 'Only' option.

Dashboard Appointment Booking Report x +

Exit Continue

Select By: ☒ Location ☐ Region

Region: All Regions

Location: < All > All Locations

Specialist: All Specialists

Appointment Reason: All Appointment Reasons

Appointment Status: < All > All Appointment Statuses

Appointment Outcome: All Appointment Outcomes

User: < All > All Users

Include Patient Types: ☐ Patient ☐ Both ☒ All ☐ Lead ☐ Unassigned

Include Telehealth: ☒ Yes ☐ No ☐ Only **New**

Productive Only: ☐

Outcome Rating: All Outcome Ratings

Date To Use: ☒ Appointment ☐ Created

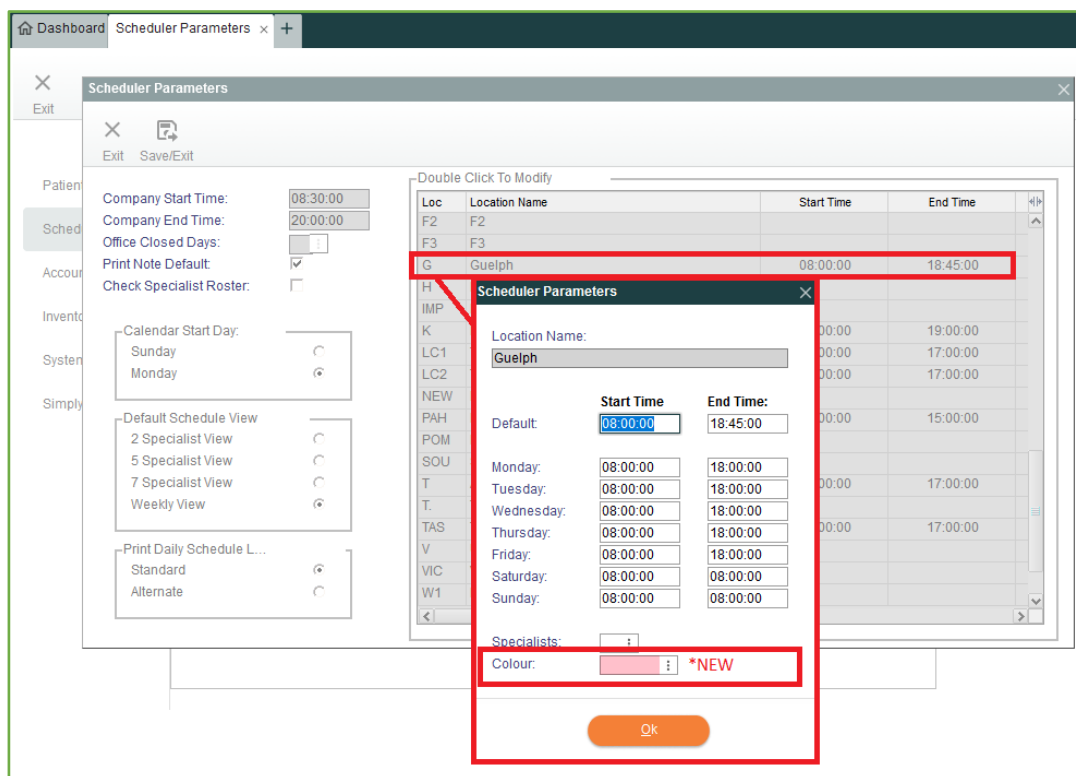
Starting Date: 01/12/2020

Ending Date: 31/12/2020

Report Options: ☒ Print ☐ Export To Excel

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.

The screenshot shows the 'Patient Notifications' configuration window. The 'Configuration' tab is selected. The 'Max Retries' field is highlighted with a red box and marked as '*New'.

Configuration

Exit Save Cancel Add Change Delete

Email Configuration

Outgoing Mail Server (SMTP):
 Outgoing Mail Server Port:
 User Name:
 Password:
 From Email Address:
 BCC Email Address:
 Security Type: ☒ None ☐ TLS ☐ SSL

SMS Configuration

SMS User Name:
 SMS Password:
 Use SMS From ID: ☐
 SMS From ID:
 SMS Route Code:

IVR Configuration

IVR User Name:
 IVR Password:
 IVR From Number:

Transmission Hours

	Start Time	End Time
<input checked="" type="checkbox"/> Monday:	01:00:00	11:00:00
<input checked="" type="checkbox"/> Tuesday:	01:00:00	11:00:00
<input checked="" type="checkbox"/> Wednesday:	01:00:00	11:00:00
<input checked="" type="checkbox"/> Thursday:	01:00:00	11:00:00
<input checked="" type="checkbox"/> Friday:	01:00:00	11:00:00
<input type="checkbox"/> Saturday:	08:00:00	17:00:00
<input type="checkbox"/> Sunday:	12:00:00	17:00:00

Ignore Notification Times ☐

Notification Defaults

SMS: ☒
 Email: ☒
 IVR: ☐

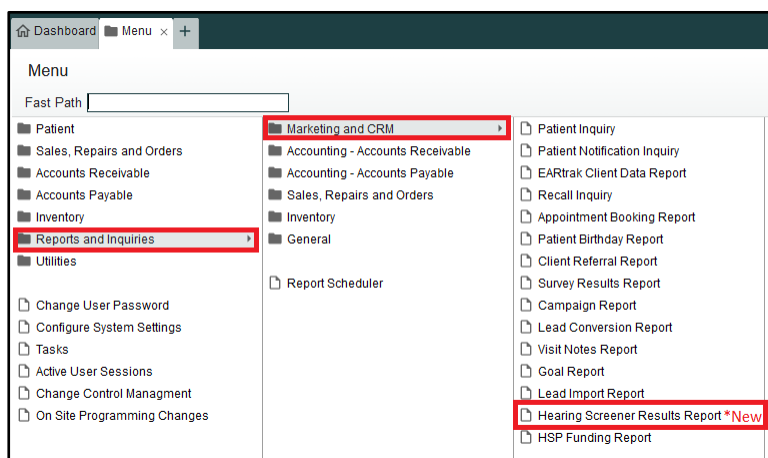
SMS Confirmation Responses:
 Direct Telehealth Messages:
 Restrict Telehealth Appt Notifications: ☒
 Max Retries: *New

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.



A screenshot of the 'Hearing Screener Results Report' configuration window. The window has a title bar with 'Dashboard' and 'Hearing Screener Results Report' tabs. Below the title bar are 'Exit' and 'Continue' buttons. The main area contains the following fields and options:

- Select By:** Radio buttons for **Location** (selected) and **Region**.
- Region:** A dropdown menu showing 'All Regions'.
- Location:** A dropdown menu showing '< All >' and a label 'All Locations'.
- Starting Date:** A date field showing '01/02/2021' with a calendar icon.
- Ending Date:** A date field showing '11/02/2021' with a calendar icon.
- Hearing Screener Result:** A dropdown menu showing 'All Results'.
- Type:** Radio buttons for **Patient**, **Lead**, and **Both** (selected).
- Report Type:** Radio buttons for **Summary** (selected) and **Detail**.

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.

Appointment Reasons

✕

📁

⌂

+

✎

🗑

↗

Exit

Save

Cancel

Add

Change

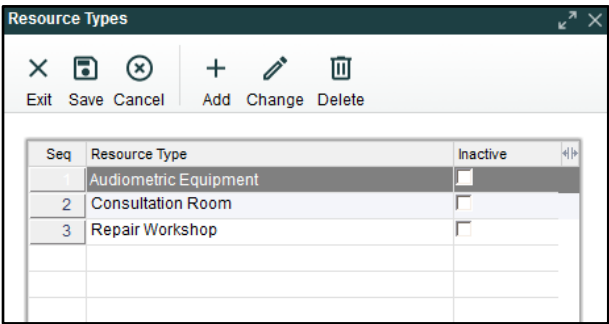
Delete

Exp/Con

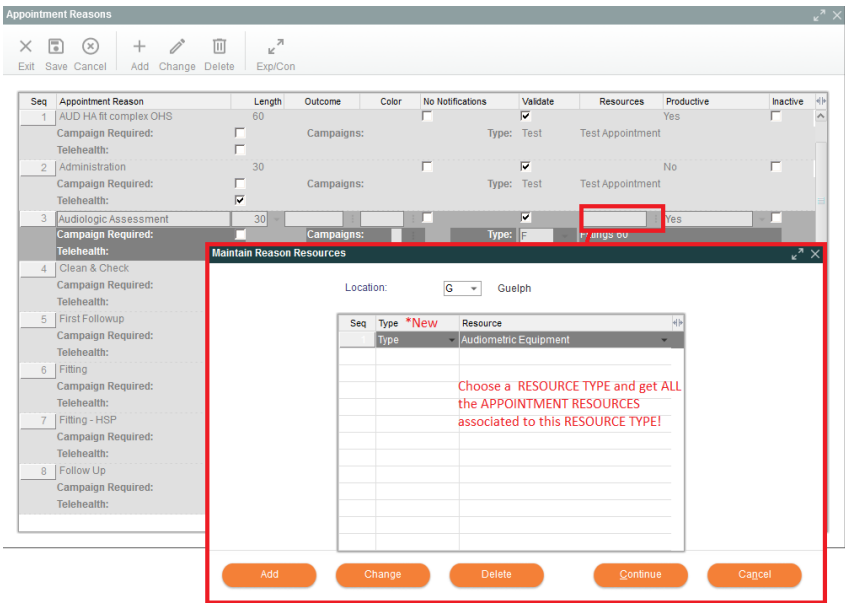
Seq	Appointment Reason	Length	Outcome	Color	No Notifications	Validate	Resources	Productive	Inactive
	AUD HA fit complex OHS	60			<input type="checkbox"/>	<input checked="" type="checkbox"/>		Yes	<input type="checkbox"/>
	Campaign Required:	<input type="checkbox"/>	Campaigns:			Type: Test	Test Appointment		
	Telehealth:	<input type="checkbox"/>							
2	Administration	30			<input type="checkbox"/>	<input checked="" type="checkbox"/>		No	<input type="checkbox"/>
	Campaign Required:	<input type="checkbox"/>	Campaigns:			Type: Test	Test Appointment		
	Telehealth:	<input checked="" type="checkbox"/>	*New						
3	Audiologic Assessment	30			<input type="checkbox"/>	<input type="checkbox"/>		Yes	<input type="checkbox"/>
	Campaign Required:	<input type="checkbox"/>	Campaigns:			Type: F	Fittings 60		
	Telehealth:	<input type="checkbox"/>							
4	Clean & Check	30			<input type="checkbox"/>	<input type="checkbox"/>		Not Applicable	<input type="checkbox"/>
	Campaign Required:	<input type="checkbox"/>	Campaigns:			Type:			
	Telehealth:	<input type="checkbox"/>							

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.

Seq	Rule	Item Numbers
	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

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 screenshot shows the 'PATIENT INFORMATION' screen with the 'Details' tab selected. The 'Additional' section contains several fields, including 'Date Of Birth', 'Medicare Number', 'Primary Funding Source', 'Secondary Funding Source', 'DVA', 'Maintenance Plan / Expiry', 'Last Client Review Date', 'Last Fitting Date Left / Right', and 'Replacement Date Left / Right'. The 'Replacement Date Left / Right' field is highlighted with a red box and marked as '*New'. The field is located under the 'Additional' section, below the 'Last Fitting Date Left / Right' field.

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 predetermined amount of product.

ExitContinueCancelAddChangeDeleteInsertExp/ConNotes

Order Number: *2249Order Date: *09/02/2021Quote Number:Bill Number:

Location:Guelph

Vendor: *Hearing Aid DistributorsAccount Number: SH123Terms: 30 DAYSPhone Number:

Specialist: *Adam SandlerCost Level:TM

Seq	Product	T	Description	Qty	OM	Unit Cost	Delivery	Patient	Rcv
0001	70-5		Siemens CIC	10					

Over Maximum Quantity

Seq	Product	Description	On Hand Qty	O/S on Order Qty	Current Order Qty	New Total Qty	Maximum Qty	Overage
1	70-5	CIC	6	52	10	68	10	58

If a product has been configured to ENFORCE MAX QTY and a user enters an order line for that product that exceeds the MAX QTY designed for this location, a message will appear showing how many QTY is on hand, outstanding orders and total overage there will be if ordered. Users without permission to edit QTY will be prevented from being able to order this QTY and users with permissions to edit QTY will next see a warning message about the QTY maximum and the opportunity to continue with the order anyways.

Ok

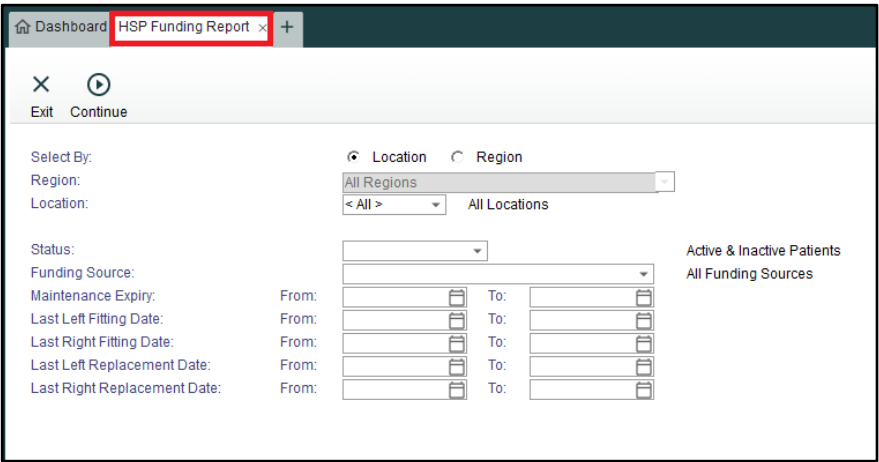
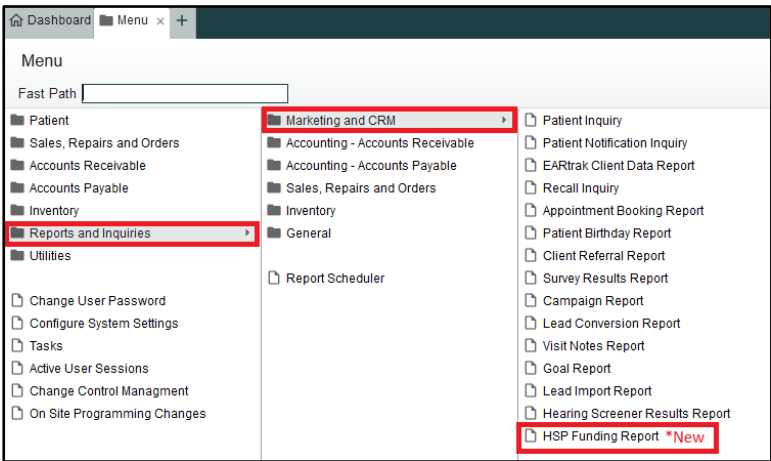
Information

Message: Adding this line would exceed the product maximum quantity for this location. Do you wish to proceed with the order?

YesNo

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.

[illegible]

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.

The screenshot shows the 'Patient Reports' screen. The top navigation bar includes tabs for Exit, Save/Exit, Save, Cancel, Add, Change, Delete, Launch Noah, Audiograms, Attachments, Notes, Reports, Alerts, Print, HS Card, Statement, Notifications, Counsel/EAR, Call Log, and Screener. The 'Reports' tab is highlighted with a red box. The main content area shows a 'Patient Reports' window with a list of reports and a detailed view of a specific report. The detailed view includes fields for Title, Description, Date, and a table for 'Hearing Aids'. The 'CONTINUE' button is highlighted with a red box at the bottom right of the report details.

Date	Description
18/02/2021	02/18/2021
15/01/2021	Adult History
23/07/2020	
16/06/2020	
16/10/2019	
16/10/2019	
24/06/2019	
24/06/2019	
19/06/2019	
15/05/2019	
15/05/2019	
15/05/2019	

Side	Description	Product ID	Model	Brand	Model	Brand	Model	Brand
Left	CIC	54353249898234	06/02/2021	AA Recharg	06/02/2021	06/02/2021	Hearing Aids	
Right	Siemens CIC		28/09/2019	AA Recharg	27/09/2022	27/09/2021	Hearing Aids	

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.

The screenshot displays the 'Appointment Resource Templates' window. It features a toolbar with 'Exit', 'Save', 'Cancel', 'Add', 'Change', and 'Delete' buttons. Below the toolbar is a table listing templates:

Seq	Template Name	Template Length	Resources
1	Full Hearing Screen Template	120	
2	Hearing Test Resource Template	60	
3	Short 15min Assessment	15	

A red box highlights the 'Resources' column for the 'Hearing Test Resource Template' (Seq 2). A red arrow points from this box to the 'View Template Resources' dialog box.

The 'View Template Resources' dialog box shows the details for the 'Hearing Test Resource Template':

- Name: Hearing Test Resource Template
- Length: 60

Below these fields is a table showing the resource allocation:

Start Time	End Time	Type	Resource
0	30	Type	Audiometric Equipment
30	60	Type	Consultation Room

A red box highlights the resource allocation table with the following text:

New APPOINTMENT RESOURCE TEMPLATES can be created and applied to APPOINTMENT REASONS that indicates a specific appointment reason uses for example a sound booth for 30 minutes and then uses a consult room for the remaining 30 minutes of a 60 minute appointment.