

Aurora

What's New

Version 6.16



Auditdata

Table of Contents

- 1 Introduction3
- 2 Lead Conversion Report Enhancement4
- 3 Editable Leads from Appointment Details.....4
- 4 New Default Marketing Method Configuration.....5
- 5 New “No Email” option on Patients and Leads6
- 6 New Zealand Order Inquiry7
- 7 Credit Orders Now Display Credit Reason.....7

1 Introduction

The purpose of this document is to provide an overview of all the new and modified features within Aurora release version 6.16.

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 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.

The screenshot displays the 'Appointment Details' window with a 'Patient Lead Information' sub-window open. A red box highlights the 'Lead' button in the top toolbar of the Appointment Details window, and another red box highlights the 'Lead' button in the Patient Lead Details section. A red arrow points from the 'Lead' button in the Patient Lead Details section to the 'Patient Lead Information' sub-window.

The 'Patient Lead Information' sub-window contains the following fields:

- Patient Lead Number: 6286
- Name / Description: David, Larry
- Phone Number: (blank)
- Survey Results: (blank)
- Preferred Contact: (blank)
- Contact Name: (blank)
- Contact Home Phone Number: (blank)
- Contact Work Phone Number: (blank)

The 'Appointment Details' section contains the following fields:

- Schedule: Abby Van Buren
- Appointment Date / Time: 11/08/2021 09:00
- Reason: (blank)
- Resource: (blank)
- Appointment Length: (blank)
- Recall Appointment: (blank)
- Appointment Status: (blank)
- Cancellation Reason: (blank)
- Campaign: (blank)
- Outcome Code: (blank)
- Note: (blank)
- Telehealth: (checkbox)

The 'Patient Lead Information' sub-window also includes a 'Marketing Method' section with checkboxes for 'No Marketing', 'SMS', and 'Email'. The 'Notifications' section includes a 'Next Appointment' field set to 12/08/2021 10:00 and a 'Lead Type' dropdown menu.

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.

The screenshot displays the 'Patient' configuration screen with a sidebar on the left containing categories: Patient, Scheduling, Accounting (AR/AP), Inventory, System, and Simply Hearing. The main area is titled 'General Settings' and lists various configuration options, each with a dropdown menu icon. The 'Default Marketing Methods' option is highlighted with a red box. A red line connects this option to a pop-up dialog box titled 'Default Marketing Methods'.

The 'Default Marketing Methods' dialog box contains the following settings:

- Enable Patient Defaults:**
- Default Patient Marketing Methods:**
 - No Marketing:
 - SMS:
 - Email:
 - Unknown:
 - Mail:
 - Phone:
- Enable Patient Lead Defaults:**
- Default Patient Lead Marketing Methods:**
 - No Marketing:
 - SMS:
 - Email:
 - Unknown:
 - Mail:
 - Phone:

The dialog box also features 'Exit' and 'Save/Exit' buttons at the top left.

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.

The screenshot displays the Aurora 6.16 software interface. The main window shows patient information for Liam Edward, including contact details, funding sources, and medical history. A modal dialog titled "Enter an Email Address or confirm No Email" is open, allowing the user to either confirm the email address "email@email.com" or check the "No Email Address" option. The "Continue" and "Cancel" buttons are visible at the bottom of the dialog.

Field	Value
Patient Number	1226
Title	Mr.
First Name	Liam
Last Name	Edward
Short Name	LI LI
Address	123 Main Street
Address	Suite 12
City	Waterloo
Prov/State	NT
Postal/Zip	12354X
Date of Birth	16/01/2004
Age	17Yr 6Mo
Medicare Number	4564654
Primary Funding Source	HSP
Primary Funding #/Expiry	1234567890-01012025 / 01/01/2030
Secondary Funding Source	ADP
Secondary Funding #/Expiry	020202 / 02/02/2022
DVA	
Maintenance Plan / Expiry	HSP / 03/08/2021
Last Client Review Date	01/01/2022
Last Fitting Date Left / Right	16/07/2021 / 28/09/2019
Replacement Date Left / Right	
Specialist Name	Adam Luke H.I.S
Physician Number	7006 / Cave, Dan Dr.
ENT Number	5006 / Jones, Craig Dr.
Campaign	Lyric
Note	BE AWARE THIS PATIENT HAS A SEVERE LATEX ALLERGY

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.

AUDITDATA

Sample Clinic Name
 Shop 42, Brisbane Shopping Plz
 354 Brisbane Road
 Brisbane, ACT 4000

Phone: 07 4568 4568 Fax: 075-194-8456

Order	
Order	2365
Date	30/09/2021
Page	1

Vendor Information

Basics
 Account Number 071020205

Credit Reason

Device defective.

External Order Number: 1112

Description	Delivery Date	Qty	Unit	Extended
Siemens CiC	30/09/2021	1-	1210.00	-1,210.00
Colour Blue				
Subtotal				-1,210.00
GST				-121.00
Order Total				-1,331.00