

# Auditbase

# User Guide



Auditdata

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Written in Denmark by Auditdata A/S, Denmark.

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# 1 Introduction

Auditbase is an integrated information system for hearing clinics. The system seeks to integrate all the working operations of a hearing clinic and to collect in one database all data concerning clients, hearing instruments, administration, etc.

The Auditbase system has been designed as a Microsoft Windows based client-server complex program for application in PC based networks.

Auditbase consists of a number of modules, which reflect the various working operations at a hearing Audiology clinic.

An Auditbase system uses an SQL database in which all the data is saved. Using an SQL standard provides the use of a range of standard tools to query information from the database. For an outline of the database tables and their columns, please consult the technical help.

The SQL database and the Auditbase design provide the facility to link with other databases and systems as is the case with a number of Auditbase versions.

Auditbase is also integrated with the Noah Framework for office systems platform by means of the Noah4Auditbase subsystem. It means that you can run a variety of Noah fitting and measurement modules and store the resulting data in the Noah database. For more information about Noah, please visit the [HIMSA](#) website.

To facilitate the work with clients and their records in the database, Auditbase supports recognition of data read by magnetic card scanner attached to the computer. Reading a client's personal number by barcode scanner is also supported. In Stock, barcode scanners can be used to read and process device barcodes.

The Auditbase system modules have all been provided with on-line help. To activate this function, press **F1**, **Shift+F1**, or select **Help** in the menu.

To search for and retrieve a client in the system from anywhere in the system, press **F3**, fill in the search criteria and select from the list of clients matching the criteria.

Client quick search (that is, search by personal number) is accessible by pressing **Ctrl+F3**.

**System Administrator** is a person(s) with the rights to make changes in Administration.

## Documentation

From the **Help** menu in Auditbase, you can access the most recent user guide and change guides concerning different areas in Auditbase that have changed significantly since Auditbase version 4.15.xx.

The aim of this User guide is to provide a comprehensive description of the Auditbase modules.

Please refer to "Instructions for use" for:

- General guidelines on how to use the system
- Safety instructions
- Installation and setup requirements
- How to log in and out of Auditbase
- Password change procedure
- User favourites and pane configuration options

## 2 Clients and Client information

*Click the button below to access our training materials.*

eLearning

Client registration and client information is managed from the **Client information** module.

A client must be registered in the client module before you can work with the client in the other modules.

## 2.1 General information

General client information is listed to the left. It contains a primary identification code, usually labelled Hospital no. or Case no. and a secondary identification code usually labelled as NHS no. The formats of the identifier codes i.e., what types of characters can be used at what position, the maximum length and any hyphenation or space characters that can be entered for new patients' are set by the System Administrator. The visible lengths of the fields can be set larger to view historical or imported patients. Other fields shown include **Title** (which is a drop-down list that can be edited by the System Administrator or you can type in individual values), name, **Address**, **GP**, **Date of birth**, **Age** (years and months for under-fives), phone numbers, **Email**, **Location** and **Department** that the client is most associated with and more. Unlike other date fields in the application, which all activate a calendar on right click, the **Date of birth** field brings up an edit dialog on right click. You must highlight the field first and then the date can be copied to paste elsewhere. The **Date of Birth** is expected to be entered by keyboard rather than calendar.

- **Last name (Surname)** is always a mandatory field to complete. In addition, **First name**, **Extra name** and **Birth date** can be made mandatory via the Administration tool.

Auditbase - [Client information]

File Edit View Functions Settings

Detailed Quick New Save System info Print Print label Import data Export data Export to Noah Log off Exit Auditbase

Search Client Print Import/Export Client data Exit

Client <>T11001 MASTER FIRSTNAME1001 LASTNAME1001 User SysAdm All locations All departments

New Save Delete Search Label Edit ID PAS update

Hospital no. T11001 NHS no. [ ]

Title MASTER

Surname LASTNAME1001

First name FIRSTNAME1001

Extra name 1231

Address 99 XXXXXXXX XXXXX1241110  
XXXXXX XXXX 1111  
XXXXXXXX11  
XXXXXX11

Postcode PC:4642 City [ ]

Gender Male User \*USER NAME8

Date of birth 03/27/2000 Age 22y Date of death [ ]

Alert T, Transport PAS alert

Home phone 99999 9999991 Mobile phone [ ]

Work phone 11  Consent to SMS

Email [ ] Only post\* [ ]

Customer 5K3 SWINDON PCT

Location All locations Department 2 Department2

Doctor GP \* DR ROWLANDSON

Doctor ENT MISS SE CHALSTREY, CONSULTANT ENT SURGEON, GREAT WESTERN HOSP

Civil status 1144

Signif. other 213

Transport 312

Information XX.XXX.XXXX.XXXXXXXXXX.XX.XXXXXX.XX122121

Contacts Details Lists/Photo Devices Onward referrals and reporting Implant Visit charge Paediatric

Additional professional contacts Add Remove

K	Type	Name	Address	Postcode	Phone	Email	Information	GP Code	City	Fax	Practise code	CCG code
<input type="checkbox"/>	Gene	AD AM	123 STR.									

K: Local keyworker

Relatives and other contacts Add Edit Delete

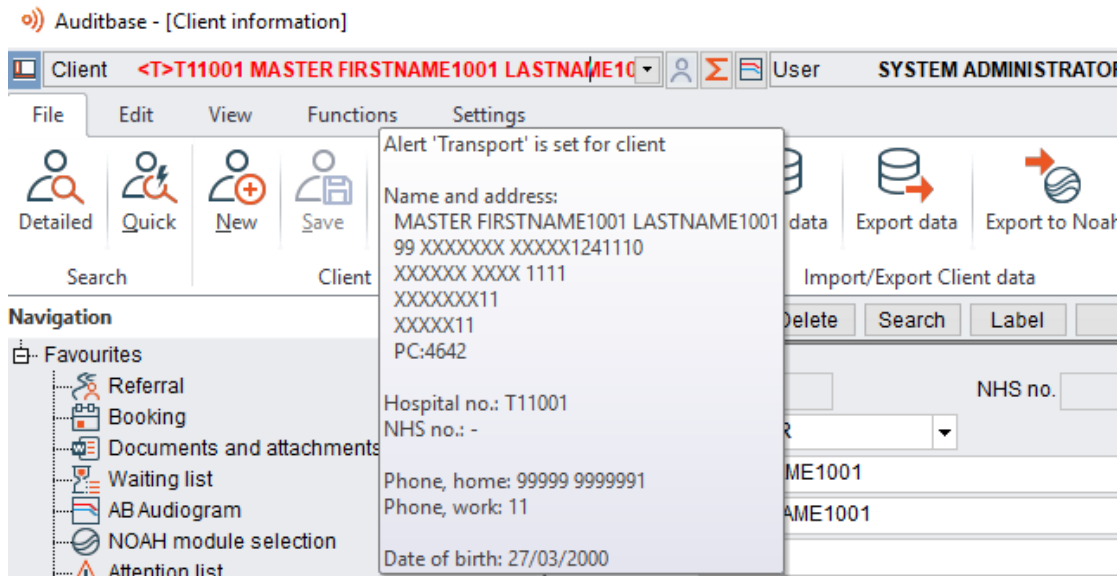
P	CC	Relationship	Name	Address	Postcode	Home phone	Mobile phone	Work phone	Email	Information
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Father	1	1	1	1	1	1	1	1
<input type="checkbox"/>	<input type="checkbox"/>	Mother	123	123	1	1	2	3		3456

P: Priority contact. CC: Send copy of letters

Relative's information

1

You can set an alert for the patient that is distinct from a PAS alert; both are displayed. If an alert is set, the client’s name changes colour to red in the tool bar and you can see which alerts are associated with the patient by hovering your mouse over the patient name in the tool bar.



### SMS Appointment Reminder consent

Sending SMS appointment reminders to clients is a licensable extra within Auditbase.

For a client to receive an SMS reminder, the client’s mobile phone number must be recorded in their **Client Information**.

If the **Consent to SMS** box shows on the **Client information** page and the patient consents to SMS reminders, record their mobile phone number in the **Mobile phone** field and check **Consent to SMS**. If the patient does not consent to SMS reminders, do not check the box.

Home phone	<input type="text"/>	Mobile phone	<input type="text" value="077 755566589"/>
Work phone	<input type="text"/>	<input checked="" type="checkbox"/> Consent to SMS	

If the **No consent to SMS** box shows on the **Client information** page and the patient does not consent to SMS reminders, check the **No consent to SMS** box. Leaving the **No consent to SMS** box unchecked implies consent has been given.

Home phone	<input type="text"/>	Mobile phone	<input type="text" value="0777 5556589"/>
Work phone	<input type="text"/>	<input checked="" type="checkbox"/> No consent to SMS	

SMS will be sent to all patients with appointments configured for SMS. Should the SMS facility stop working for a period, it will check back upon re-start and send up to two reminders to those clients that were missed because of the close down but will not send more than one per patient on any day.

### Viewing SMS notifications for a particular client

If SMS Appointment Reminder is licensed, then the date and time of any SMS appointment reminders sent will be shown in the two columns called **SMS1** and **SMS2** on the **Client's entries** dialog. This can be found in two ways. In **Navigation-> Booking -> Functions -> Client's entries** or in **Navigation-> Client's entries**.

Client's appointments and waiting lists
✕

Client **MRS FIRSTNAME106 LASTNAME106**
Close

Appointments list - 393 item(s)
History of changes
Attached actions
Delete from history
Show in appt.book

Date	Time	Loc.	Dept.	Appt.	Status	Resource	Reason	Declined offer	
28/12/2018	08:00			☒	*	Alan			MA
28/12/2018	08:00			☒	*	Charlie			MA
28/12/2018	08:00			☒	*	Res70			MA
10/12/2018	12:30			☒	*	Charlie	++GP direct referral		SA
10/12/2018	12:00			☒	*	Alan	++GP direct referral		PF
05/07/2018	10:00			1	*	Travy			1
04/07/2018	12:00			☒	*	Travy			SA
23/06/2018	11:00	2	2	☒	*	Stassy			PF

Waiting list entries - 13 item(s)
Add
Edit
Show in waiting list

Wait time	Date	Waiting list	Information	
-275	03/10/2013	z SAVERNAKE-OLD DO NOT USE OR DELETE (Aud ass) +	1231231	
-324	01/10/2013	zTGW - PAED HEARING AID CLINIC 3	333333333	
-292	09/04/2014	TGW - FOLLOW UP 3	test info äæ	
-271	27/10/2014	TGW - CALORICS & POSITIONALS - PP 4!@#%&*/? "	abcdefghijkl	
-258	27/10/2014	TIDWORTH - review 3	abcdefghijkl	
-253	05/03/2015	TGW - DOMI new 1	123123123	
-228	21/04/2015	TGW - FOLLOW UP 3	1	

### Email

Having entered the clients email address, select the clients preferred method of receiving letters and documents. Use the browser button next to the email address to select from the variations of post or email. If the site default option is used it will be starred with an asterisk.

Email	jany@com.com	Only post*		
Customer	UNKNOWN PCT			
Location	All locations	Department	All departments	
Doctor GP	DRAL ALLIK, 123 STR, SOME CITY, ABC 1234 CITY			
Doctor ENT	MRS ANNAN, 222 STR, HOME CITY			

ETHNICITY

- Site default (Only post, ignore email address)
- Only post, ignore email address
- Post and email if email is available
- Only email, post if email is not available

**Be aware:** Please ensure the e-mail address is correct; entering an incorrect e-mail can cause sending the client's data to a wrong addressee.

### Delete client

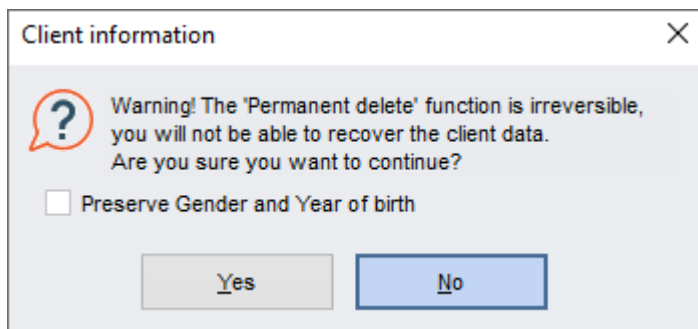
A client can be deleted from the database in two ways; either a recoverable delete or a permanent delete. These are extended rights which have to be assigned to the Auditbase user for them to be able to perform this function. The recoverable delete right and the permanent delete right are now separate from each other.

To delete a client from the database that can be recovered, click the **Delete** button. The user is warned that carrying out this action cannot be undone.

- Pressing **Yes** to this security question of deleting disables future handling of that client.
- Pressing **No** ends deleting session without erasing client information.
- Recovering deleted clients can be done by the system administrator in the **System Administration** tool.

To delete a client that is permanent and cannot be recovered, select **Permanent delete** from the drop-down menu on the **Delete** button or select **Edit -> Delete client -> Permanent delete**.

A warning message appears, advising you that this is a permanent function and cannot be undone. You have the option to **Preserve Gender and Year of birth** only for research purposes.



- Select **Yes** to permanently delete the client or **No** to cancel the deletion. The client will then be permanently deleted from the database and cannot be recovered.

### Client labels

You can create and print a client label for a client.

Press **Label** from **Client information**.

- The **Label** window opens with a predefined label text containing the client's name, address, postcode and city.
- You can edit this text.
- Click **Print** to print the label. Note that a label printer must be specified by the system administrator.

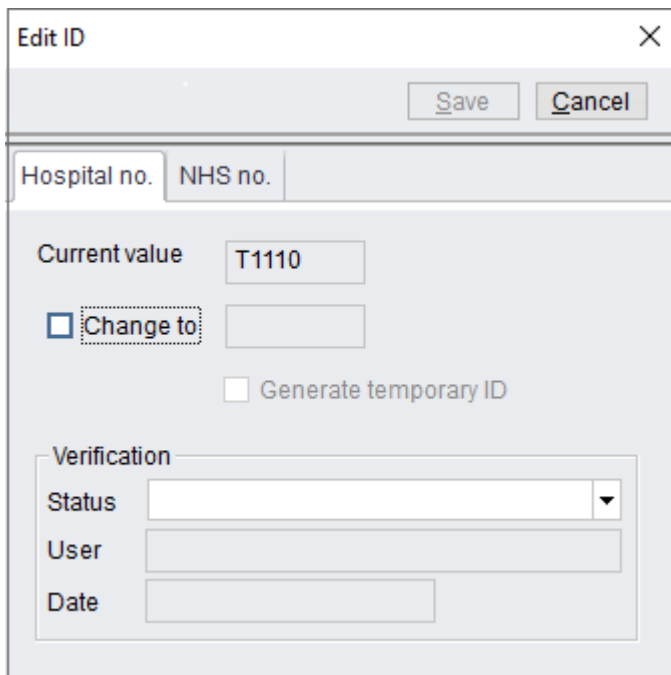
### Edit ID

To edit the ID fields on an existing client in the database, click the **Edit ID** button. This will open a dialog where you can change the ID.

To change either of the IDs, click **Change to** and enter the new ID value or check for a temporary ID to be generated.

A 'Verification' status of 'Verified' can be set by Users, or set by PAS, on either the Primary or Secondary Identifier Code. These settings are enabled in the system administration.

To set the client's code as verified, open the **Edit ID** dialog from the Client Information screen and choose a verification status from the dropdown list. The Verification status will be set with the User, date, and time of the verification. The verification status can be removed by choosing the empty line in the dropdown list and clicking **Save**.



The Verification status will be shown on the **System Information** dialog for the Client, available from the File menu.

### PAS update

If PAS link is set up, this function updates the demographic data for the selected client.



*Please ensure that the client is the same as requested before saving.*

PAS refresh: If the Hospital HL7 system supports updating identifiers, and an updated identifier is returned, and that identifier is already applied to another patient instance, then the user may receive a notification that a patient merge record is created in the Attention List.

### System information

This window presents technical system information about a selected client. To open the window, select **File -> System information** from **Client information**.

The user who created the client in the database and the creation time is shown in **Record creation**.

The user who last edited the client and the time for the modification is shown in **Last record modification**.

**ID** (Internal system client identifier) and **GUID** (Global Unique Identifier) are shown in Record identification keys. **GUID** can be copied to the clipboard by clicking **Copy**.

## Customers

- Select **Settings -> Customer** from the Client information module. This will open a window where the customer's name, address, invoice address, contact person, customer number (max. 9 characters), etc. can be defined.
- Before entering details click on **New**. The name of the Customer can be entered and the **Priority** can be set. Auditbase uses this priority to list the customers. If no priority is set, the customers are listed alphabetically.
- A **Customer code** can be set; this can be up to 10 symbols in length. Please note that a customer code can be mandatory if configured in the Administration tool.
- The **Address** and **Invoicing address** (if not the same) are entered in the appropriate boxes as well as the **Contact person** and their **Telephone no.**
- From the drop-down list, select the default payment account for the customer. If the customer is included in a customer group, select the group from drop-down list.
- Click **Save** to save customer information to the database.
- Editing the customer data is done by highlighting the fields with the saved information, altering this information and pressing **Save**.

Click **Delete** to delete a defined customer from the database. Note that the system does not allow deleting a customer which is referenced elsewhere in the system. If a customer is no longer in use as the requirements have changed then it is now possible to outdate the customer within System Administration.

## 2.2 Tabs

The tabs on the right, **Contact**, **Details**, **Devices** and **Visit charge**, contain further information related to the client including contact information for relatives and professionals, condition, client's ethnicity and possible need for an interpreter, privately granted aids, notes, and other site specific information. Depending on licensing you will also see a **PPP** and **Implant** tabs – please see chapters on PPP, [Client Information](#), and on Auditory Implant Module, [Auditory Implant Module](#) and [Client Information Screen](#).

To set a tab as the default tab, go to **View -> Default information tab** and select which tab you would like as the default tab. The selected tab will be the default tab when entering Auditbase and when changing client.

The layout of the *Client Information module* can be modified from the Administration tool (via Client module settings and/or User specific options) in a way that some or all of the following tabs can be hidden from view: *Contacts*, *Lists (Trials)/Photo*, *Devices*, *Implant*, *Paediatric*, *PPP* or *Record history*.

- *Details* is a mandatory tab and will appear in any layout.

### 2.2.1 Contacts

From the tab **Contacts** you can **Add**, **Edit** or **Delete** professional or personal contacts of the client. These can be used when making correspondence.

Contacts | Details | Lists/Photo | Devices | Implant | Visit charge | Paediatric | PPP < >

Additional professional contacts Add Remove

K	Type	Name	Address	Postcode	Phone	Email	Information	GP Code	City	Fax	Practice c
<input checked="" type="checkbox"/>	Gen	DR AA	3 VALE A	PC:6376		olepus		3453544			K84074
<input type="checkbox"/>	Othe	AMAN	MERCHI	PC:3523							

< >

K: Local keyworker

Relatives and other contacts Add Edit Delete

P	CC	Relationship	Name	Address	Postcode	Home phone	Mobile phone	Work phone	Ei
<input type="checkbox"/>	<input type="checkbox"/>	Father	MR AL	Universit					
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mother	MRS B	Universit					

< >

P: Priority contact. CC: Send copy of letters

Relative's information

When adding or editing a Relative and other contact, you can select that contacts preferred method of receiving letters or documents. Select from the various post and email options. Relatives can be updated by a PAS interface if this has been set up by the System Administrator. Relatives that have been created manually may be removed by a PAS interface if they are not included in a PAS interface message.

When adding a professional contact, such as a teacher or consultant, you either search on part of the name through all the referring agents in Auditbase or add a new referring agent. One of the professional contacts can be marked as the **local keyworker**, shown as a check under the **K** column. A professional contact can automatically be added as a recipient of a specific letter in the **Letter** dialog from the **Booking** module.

When adding a personal contact, such as parent or legal representative, you click **Add** to enter the details you have been given. A personal contact, unlike the professional contacts, will only be added for the selected client, so you cannot re-use these for other clients.

One of the personal contacts can be set as the **priority** contact, shown as a check under the **P** column. If you try to set a second contact as the priority contact, you will be prompted to either keep the existing priority contact or update the priority contact to the currently selected contact. You may also set any number of contacts as **copy to**, shown as a check in the **CC** column, so that they can be included on letters by default.

When designing a letter, you can list all contacts that have been marked as **CC** and all other contacts chosen as recipients by using the variable **List of recipients** under **Letter specific information**.

### 2.2.2 Details

Under the tab **Details**, you will find an array of extra information about the client such as which condition the client is in (physical, visual and attitude), the ethnic category the client belongs to and whether or not the client requires an interpreter, special aids and forms and other site specific information which is configurable by your System Administrator.

Irrelevant information can be hidden via the Administration tool. Thus, any of the following fields can be excluded from the tab layout:

- Referral outcome
- Ethnic category
- Special aids and forms
- Other invoice receiver
- Travelling distance

You can also set multiple alerts and parameters for the patient. The specific alerts and parameters are set up by your System Administrator. The user responsible for setting the alert is recorded in the details tab as well as the date that it was added on. This is as well as a record of the user who set the alert being added to the Security Log in the System Administration tool.

The System Administrator can also enable an Auto Journal Event (1490: Client Alert Removed) that will trigger a record to be created in the Journal specifying the User who removed the Client Alert and the time the Alert was removed.

If a client is marked as **Deceased**, users will be prevented from making appointments or referrals for the client or adding the client to any waiting lists. You can still make a **Treatment summary** for the client but you will be warned beforehand that the client is marked as deceased.

The time when a deceased alert is set, and by which resource, is registered in the system's security log, which is accessible for System Administrators.

A snapshot of a patient's most recent or **Current referral outcome** entered on their referral is shown in the **Details** tab. Since outcomes can be entered with retrospective dates, the most recent one is the one which most recently applies, rather than the one most recently entered.

The information shown is

- Outcome status code
- Outcome status name

- Date the outcome applies to the referral
- Clock action of the outcome

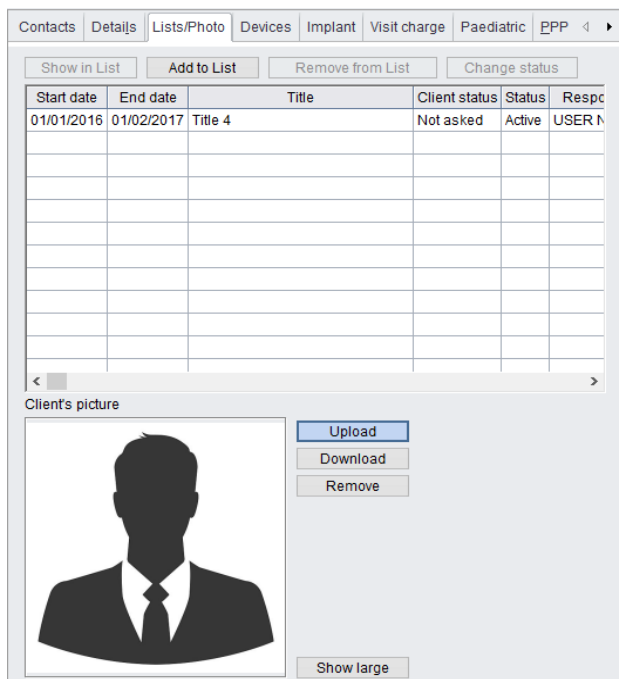
If you check the need for Interpreter, you can also choose which language the interpreter should speak. After choosing language, if you uncheck **Interpreter**, language is left on, which can be useful if you just want to make a note of which language the client speaks.

Whether or not a patient is suitable or consents to have Video Appointments can be recorded on the **Video appointments accepted** checkbox. This value can also be both seen and set on the **Make Booking** dialog.

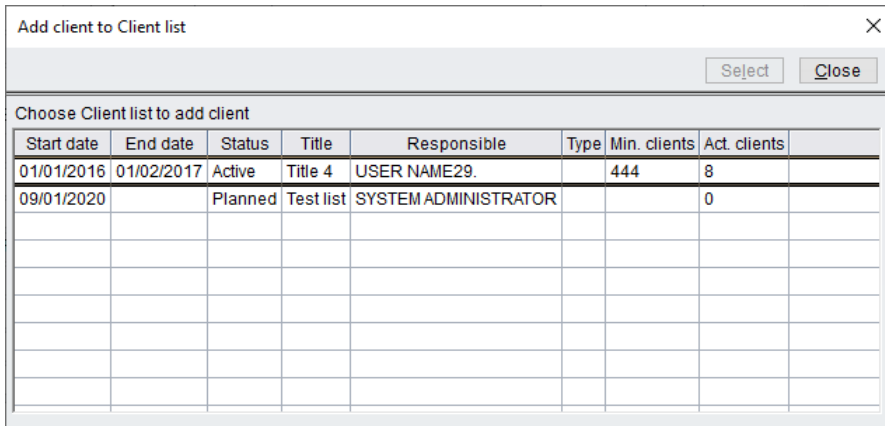
The **Travelling distance (one way)** can be added. This is shown in **Client lists/Trials**.

### 2.2.3 Lists/Photo

The **Lists/Photo** tab will display all Client lists/Trials that the client is assigned to and is a place where a photo of the client can be uploaded. The active client can be added to or removed from a list and their status on the list can be changed.



If a client has not been assigned to a list yet, all the buttons on this tab, except **Add to List**, will be inactive. If you wish to add this client to a current list, select **Add to List** and all active lists will be displayed in a window.



Select a list by clicking on it and **Select**. The client will then be added to the list with the default **Client status**. This **Client status** can be changed by selecting the **Change status** button or click into the **Status** column directly in the table. You will be able to **Select new status for client** from the drop-down list prepared by your System Administrator.

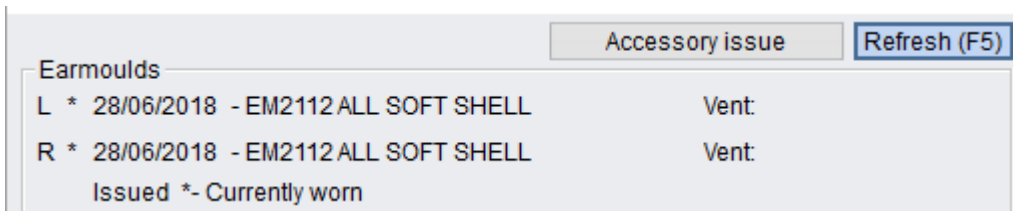
If the client is already on a list, **Show in list** will take you to the **Client list** and display more details. A client can be removed from a list by highlighting the list and selecting **Remove** from list. A confirmation message will ask you to confirm that you want to remove the client from the list, **Yes** will confirm and **No** will return you to the client’s information.



A photograph of the client can be added to the **Lists/Photo** tab. Select **Upload** and navigate to the photograph image file, there is no maximum size control so do not load more than a few hundred kilobytes otherwise the database will grow. Once the file has been selected, **Open** will add this to the tab. If you wish to save a copy of the photograph, **Download** will open a window where the image file can be saved. **Remove** will remove the photograph from this tab, after you have confirmed this is what you intended. A larger version of the photograph can be shown by selecting **Show large** which shows up to a maximum height of the minimum screen resolution. The window that opens can be closed using the **Close** button.

### 2.2.4 Devices

The tab **Devices** is a quick overview of the currently issued devices for the client. It shows **Earmoulds**, serial controlled current **Devices** and quantity controlled current devices, which are marked in System Administration as **Accessories**.

Earmoulds synopsis is shown below. This demonstrates the type of mould per ear and the vent size which has been selected for each mould. It also shows the date of the last stage of where the earmould is e.g. Sent to Manufacturer, Ready or Issued.



Devices							New status
Modified date	Stock type to	Article	L/R	User	Serial number	Item information	^
10/02/2017	SENT FOR R	NHS S		Oleks	546456B	test info	
18/10/2016	REPLACEME	NHS S	-	full n	925104		
26/11/2015	SENT FOR R	NHS S		SYST	PO890909		
26/06/2015	RECONDITIO	Test m	L	full n	2221		
 14/05/2015	FITTED/EXCI	NHS S	R	full n	1121		
08/05/2015	FITTED/EXCI	NHS S	L	full n	123123	1	
 08/05/2015	FITTED/EXCI	NHS S	L	full n	12121	1	
08/05/2015	FITTED/EXCI	NHS S	L	full n	1123	3	
01/05/2015	FITTED/EXCI	Test m	R	full n	2222		▼

Accessories			New status
Created date	Stock type to	Stock Group	
03/10/2013	FITTED/EXCHANGED (Issued)	BATTERIES (Quantity-Accessory)	N
24/05/2007	POSTAL BATTERIES (Issued batteries)	BATTERIES (Quantity-Accessory)	N

You can change the status of a device or an accessory, for example, to register it's returning to stock, by selecting it in the list and then clicking the **New status** button.

When designing a letter, you can insert variables with information about the four latest serial number controlled devices and the four latest accessories from the **Current issued devices** and **Current issued accessories** groups, respectively.

### 2.2.5 Onward referrals and reporting

From this tab on the *Client Information* page, you can view, create and edit the patient's 'Onward referrals and reporting' memberships.

Contacts																																																							
Details	Lists/Photo	Devices	Onward referrals and reporting	Implant	Visit charge	Paediatric																																																	
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <span>Show in list</span> <span>Add to list</span> <span style="background-color: #e0e0e0;">Edit in list</span> <span>Remove from list</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Title</th> <th>Status date</th> <th>Status</th> <th>Comment to status</th> <th>Responsible for</th> </tr> </thead> <tbody> <tr> <td>LRDC All</td> <td>11/29/2022</td> <td>Added to list</td> <td>Comments</td> <td>SysAdm</td> </tr> <tr> <td>Paediatric module onward referral</td> <td>11/29/2022</td> <td>Referred</td> <td>Comments</td> <td>SysAdm</td> </tr> <tr> <td>UK NICE Implant guidance</td> <td>11/29/2022</td> <td>Added to list</td> <td>Added by UK NICE Implant guid</td> <td>SysAdm</td> </tr> <tr style="background-color: #f2f2f2;"> <td>LRDC Severe</td> <td>11/29/2022</td> <td>Added to list</td> <td>Added by LRDC Severe,Audiog</td> <td>SysAdm</td> </tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>						Title	Status date	Status	Comment to status	Responsible for	LRDC All	11/29/2022	Added to list	Comments	SysAdm	Paediatric module onward referral	11/29/2022	Referred	Comments	SysAdm	UK NICE Implant guidance	11/29/2022	Added to list	Added by UK NICE Implant guid	SysAdm	LRDC Severe	11/29/2022	Added to list	Added by LRDC Severe,Audiog	SysAdm																									
Title	Status date	Status	Comment to status	Responsible for																																																			
LRDC All	11/29/2022	Added to list	Comments	SysAdm																																																			
Paediatric module onward referral	11/29/2022	Referred	Comments	SysAdm																																																			
UK NICE Implant guidance	11/29/2022	Added to list	Added by UK NICE Implant guid	SysAdm																																																			
LRDC Severe	11/29/2022	Added to list	Added by LRDC Severe,Audiog	SysAdm																																																			

From the *Add/Edit onward referral dialog*, you can choose the professional or organisation that you refer to, attach an appointment, change the status of this onward referral, as well as add comments and patient consent.

The audiogram that triggered the notification rule and subsequent addition to the onward referral list is displayed in text form.

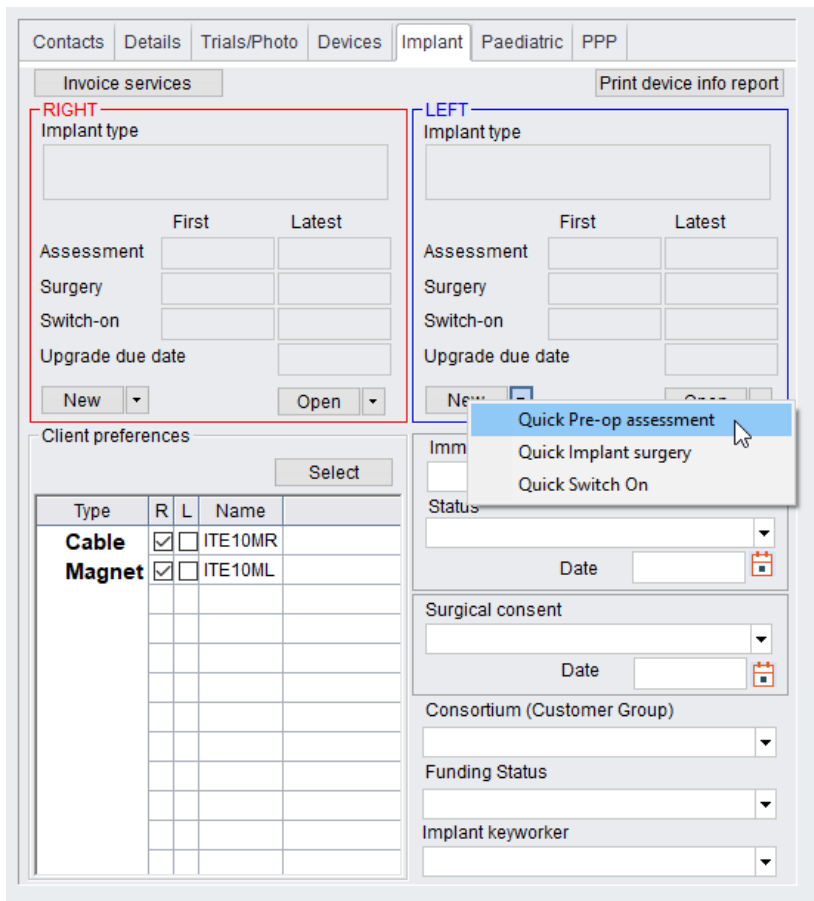
The screenshot shows a dialog box titled "Add/Edit onward referral". At the top, there is a warning message: "The Auditbase audiogram must not be used as the sole means by which a diagnosis is made." Below this, there are several input fields: "Referred to" (text box with "MARORA, KINGSWOOD SURGERY, KINGSWOOD AVENUE, PARK NORTH, SWINDON, PC"), "Responsible user" (dropdown menu with "SysAdm"), "At appointment" (text box with "11/30/2022, 1"), and "Audiogram" (text box with "11/29/2022, no. 5"). Below these is a "Status" section with a dropdown menu set to "Added to list" and a date field set to "11/29/2022". A text area below the status field contains the text: "Added by LRDC Severe, Audiogram: 11/29/2022, no. 5]". At the bottom is a "Patient consent" section with a dropdown menu set to "Not applicable" and a date field set to "11/29/2022". There are "OK" and "Close" buttons at the top right.

## 2.2.6 Implant

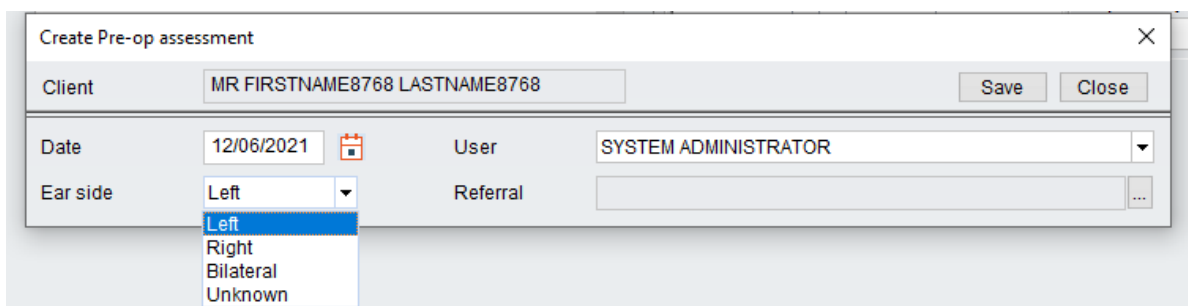
The Implant tab is only available if you are licensed to use the Auditory Implant module. The tab will show you an overview of the client's implant status.

On this tab, you can create a 'quick' version of the Pre-Op, Surgery and Switch-on records with just the minimum of information directly from this tab.


- Click the down arrow on the **New** button to choose which type of record to create.
- Mandatory information depends on the type of record. However, date, an ear side and a referral are required for all types.



- **Ear side** is pre-selected depending on which **New** button you click (from left or right), but you can change the value to *unknown* or *bilateral*.



- You must either choose to attach to an existing referral or create a new one.

If the referral does not exist or an existing one cannot be used, you can create a 'quick' referral by clicking the **New** button from the  button to the right of the Referral field. See details in [Quick referral creation](#).

In order to view full records to which the dates of **Assessment**, **Surgery** and **Switch-on** refer, use the **Open** button to select the relevant form.

### 2.2.7 Visit charge

This tab is primarily used in Sweden. It gives you the overview of a patient's eligibility for free of charge visits, including annual card number, date due (the date the annual card expires), preferred payment method (used if the client is not eligible for free of charge visits) and the client's free of charge status (enabled or disabled). Additionally, it shows the client's self-check-in status (allowed or prohibited) where applicable.

### 2.2.8 Paediatric

The paediatric tab allows new information to be entered and will collate information from the **Paediatric** module and the History in DR Medical Assessment.

If a client has an **ABR and OAE screening and diagnostics** entry where **Test type** is screening referral, the most recent outcome will be shown in the box labelled **Hearing screening referral**.

Contacts Details Lists/Photo Devices Implant Visit charge Paediatric PPP < >

Hearing screening referral Clear Response - No Follow-up Required

**RIGHT**

Diagnosis    
 Current HI type

**LEFT**

Diagnosis    
 Current HI type

Medical history

Date

Hearing loss

Right  Left

Confirmed syndromes

Name
Progressive unknown
Meningitis

Risk factors

Name
Absence of Tibia

Risk factors and syndromes are taken from the Paediatric module. Medical history lists are empty

SCBU/NHU/NICU

Confirmation of PCHI: Date   Age

Weight at birth (kg)  Gestation (weeks)

**Diagnosis** and **Current HI type** can be entered from the drop-down lists for left and right; this information is not displayed anywhere else in Auditbase. The options cannot be adjusted in System Administration.

**DR-Med** – Information from the most recent DR-Med questionnaire can be shown. Previously created questionnaires will be shown in the drop-down box labelled **Date**. **New** or **Edit** can be used to create or edit just the information in this box in a pop-up dialog. It will save to a DR-Med record. **Open DR-Med** will open the full DR Med History.

**SCBU/NHU/NICU**, **Confirmation of PCHI Date and Age**, **Weight at Birth and Gestation** can be entered here and will be repeated on the Paediatric module and vice versa.

## 2.2.9 Record history

The **Record history** tab shows:

- when a client's record was created or modified
- if/when the deceased alert was issued
- NHS number verification status and the time it was set
- last updates to the record by a PAS/HL7 interface

At the bottom of the screen, there is the Client origin information (e.g., whether a Client originated from a merge or conversion, and when).

- *NOTE: This data is not backdated.*

Contacts	Details	Lists/Photo	Devices	Implant	Visit charge	Paediatric	PPP	Record history
----------	---------	-------------	---------	---------	--------------	------------	-----	----------------

**Record creation**

User: **USER NAME8**

Timestamp: **12/23/1999 0:00:00**

**Last record modification**

User: **USER NAME29**

Timestamp: **4/3/2008 13:53:24**

**Deceased alert modification**

User:

Timestamp:

**NHS no. verification**

Status:

Timestamp:

User:

Latest PAS update:

Client's origin

## 2.3 Card reader input – restricted to Danish users

From **Client information**, you can perform a client search by scanning the barcode or reading the magnetic strip on the client's card. You can also search for other information scanned from the card. The system administrator defines how the system recognizes input from the barcode and the card reader.

The **Card reader input** window is used for capturing and recognizing data read by the magnetic card reader attached to the computer. The window is activated when the user scans the magnetic card.

The recognition of reader input is performed according to settings made by the system administrator. If the recognition is successful, the system performs a search for the client by personal number read from the card.

If the client does not exist in the database, the system initiates a creation of a new client and fills the window with the data read from the card.

If the client already exists in the database, which was initiated from **Client information**, the system shows details for the client and compares the information read from the card with the data already present in the database. If there are differences, the system opens the **Correct differences in client information** window.

The inconsistencies are shown in a table with 4 columns:

Column 1 shows the name of the data with inconsistency. The following data are read from the card and compared with the database: Client first name, Last name, Address, Postal code, Customer number, and GP code.

- Column 2 shows the value stored in the database.
- Column 3 shows the value read from the card.
- Column 4 contains checkmarks. When you select a check box, you select to use the value read from the card. Use **Select all** to select all data.

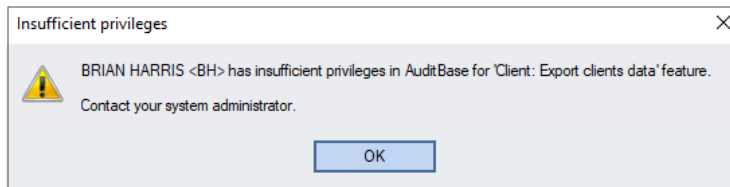
To correct the data, click **Correct**. Note that this only changes the content in Client information. You need to save the data to the database.

## 2.4 General search for a client

- Press **F3** or **File -> Client Detailed search**.
- Enter **Basic search criteria**.
- If you list the surname and first name, you get a list of all clients registered to the Auditbase System matching the criteria. Auditbase will also search for part of a name; i.e. entering 'sm' in surname will list all clients whose surname starts with 'sm'.

- Click **Search** or press **Return**.
- Click on the appropriate client and click **Select** or double-click on the appropriate client.
- Where the search should be abandoned, and a new search started there is an option to **Clear** the Search fields. This allows for the Auditbase user to clear all of the fields which have been populated.
- Once the list of clients has been produced, this list can be saved to a CSV file which can be read in Excel. Select **Export to CSV** and a window opens where the CSV file can be saved.

- It is an extended user right to be able to export these clients. If you do not have the rights, a window will appear informing you of this. You will need to contact your System Administrator to assign you the extended right.



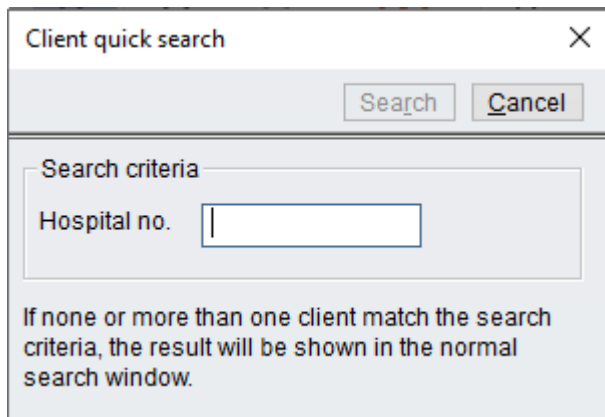
When you have selected the appropriate client, the system returns to the main screen of the opened module, for instance **Booking**. The selected client's name will be displayed at the top of the screen.

*It is important to check the client's name regularly to make sure you are working with the correct client.*

Multiple clients can be selected using the check boxes in the left-hand column. This multiple selection may be printed or added **To Client list** or **To waiting list**. During the creation of a group booking a selection of clients with the same settings in **Advanced criteria** can be made using this feature.

## 2.5 Quick searching for a client

- Press **Ctrl+F3** or **File -> Quick**.
- Enter the client's personal number or a hospital no. assigned to the client
- You can use the wild card '%' in this field.
- Click **Search** or press **Return**
- If the client exists, the system selects it automatically
- If the client is not found, or multiple clients share an incomplete personal number, the **Client advanced search** screen is activated



Client quick search

Search Cancel

Search criteria

Hospital no.

If none or more than one client match the search criteria, the result will be shown in the normal search window.

*It is important to check the client's name regularly to make sure you are working with the correct client.*

*Contact your system administrator to configure which type of hospital code is searched for in this feature.*

## 2.6 Advanced Search criteria

- Press **F3** or **File -> Client Detailed search**.
- The **Client advanced search** window will open.
- Click **Show advanced criteria** to show and enter more details such as **Alerts** and **Parameters, Email, Department, Date of Birth, Date of Death** and **Customer** if needed.
- You can use the search criteria **Phone** to search for any phone number, such as work, home or mobile phone number.
- You can also search for clients with a specific **Alert**, either a patient alert or a **PAS alert**.
- If you want to exclude deleted clients, check the box **Exclude deleted clients**.
- You can also search on a **Parameter** to find clients with either of two specific parameters.
- You can use the **'%'** wild card in the search fields that are not dropdown lists.

### 2.6.1 Searching for clients by audiogram

Clients can be searched for by hearing threshold using the client’s latest Audiogram curve.

- Select **Search by hearing loss** and the **Ear, Curve** and date range options will become available.
- The date range will default **from** one year ago **to** the current date.

- There are three options for **Ear**; **Bilateral**, **Unilateral** and **Distinct ears**.
- Enter the **Min** and **Max** thresholds for the relevant frequency. Selecting **Distinct ears** will activate both threshold fields which are not side specific.
- Different types of audiogram can be chosen using the **Curve** selection. Only the latest curve of the selected type will be searched.
- **Search** will show the results and these can be selected by checking the box to the left of the name or **Select all** and can then be added **To Client list**, **To Waiting list** or can be printed by selecting **Print**.

Audiogram (latest curve)

Search by hearing loss

Ear: Bilateral      Curve: Air

	125	250	500	750	1K	1.5K	2K	3K	4K	6K	8K
Min											
Max											

from: 09/01/2019

to: 09/01/2020

	125	250	500	750	1K	1.5K	2K	3K	4K	6K	8K
Min											
Max											

### 2.6.2 Searching for clients by device

Clients can also be searched for by **Device**:

- Check the box **Search by device(s)** and selections can be made from **Stock group**, **Manufacturer** and **Article type**. These options are taken from your Stock module. Each Article in Stock is defined as one of several **Article types**.
- **Search** will show the results and these can be selected by checking the box to the left of the name or **Select all** and can then be added **To Client list/Trial**, **To Waiting list** or can be printed by selecting **Print**.

Device


Search by device(s)

Stock group:

Manufacturer:


Article type:

## 2.7 Recently accessed clients

Each user of the system has a list of the 9 most recent clients. To access the list, click on  on the toolbar to the right of the patient name on the **Booking** screen or press **Shift+F3**.

1: DR. TESTFNAME1 TESTSNAME1
2: MASTER FASTS MASTS
3: DR. TESTFNAME212 TESTSNAME212
4: MISS FIRSTNAME34894 LASTNAME34894
5: MISS FIRSTNAME36849 LASTNAME36849
6: MST FIRSTNAME25177 LASTNAME25177
7: MR FIRSTNAME45867 LASTNAME45867
8: MRS FIRSTNAME8167 LASTNAME8167
9: MRS FIRSTNAME45408 LASTNAME45408

## 2.8 Adding a new client to the database

- Search for the client first to ensure the client is not already in the database.
- **Navigation-> Client information**, press **Ctrl+Shift+C**, or click .
- Click **New**.
- Enter the client details.
- Click **Save**.

The fields **Surname** and **Case number** or **NHS number** are mandatory. You can enter as much or as little other information as you require.

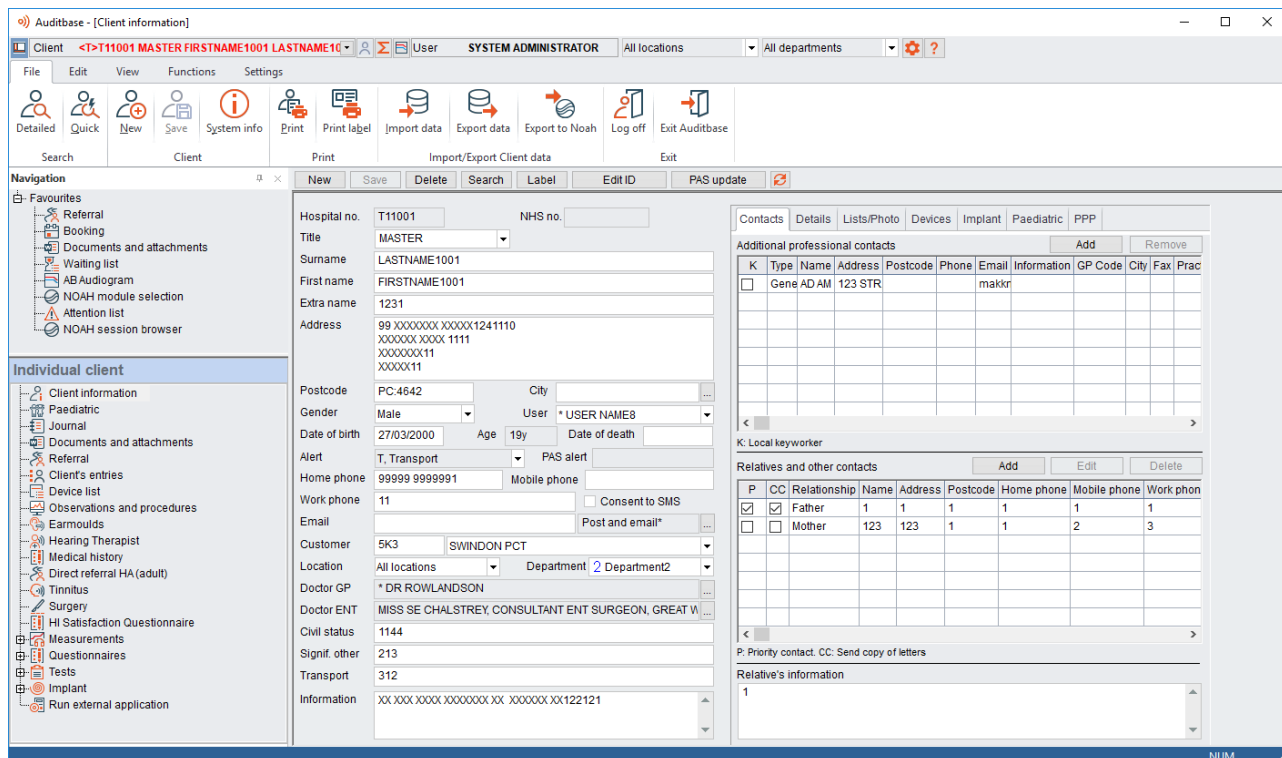
**Gender** options are expanded beyond just Male or Female and can be defined by your System Administrator from a default Department of Health list.

If two users are working on the same client, a **Refresh** button is available to update the client's details immediately.

Postcode validation may be applied in Administration which restricts formats of postcodes allowed to be entered.

*Contact your system administrator to find out which fields are mandatory.*

*Contact your system administrator to configure the default first field when creating a new client.*



The screenshot shows the 'Client information' window in Auditbase. The client ID is T11001. The form is populated with the following data:

- Hospital no.: T11001
- Title: MASTER
- Surname: LASTNAME1001
- First name: FIRSTNAME1001
- Extra name: 1231
- Address: 99 XXXXXXXX XXXXX1241110, XXXXXXXX XXXX1111, XXXXXXXX11, XXXXX11
- Postcode: PC:4642
- City: [Empty]
- Gender: Male
- User: \*USER NAME8
- Date of birth: 27/03/2000
- Age: 19y
- Date of death: [Empty]
- Alert: T, Transport
- PAS alert: [Empty]
- Home phone: 99999 9999991
- Mobile phone: [Empty]
- Work phone: 11
- Consent to SMS: [Checked]
- Email: [Empty]
- Post and email\*: [Empty]
- Customer: 5K3 SWINDON PCT
- Location: All locations
- Department: Department2
- Doctor GP: \* DR ROWLANDSON
- Doctor ENT: MISS SE CHALSTREY, CONSULTANT ENT SURGEON, GREAT V...
- Civil status: 1144
- Signif. other: 213
- Transport: 312
- Information: XX XXXX XXXX XXXXXXXX XX XXXXXXXX122121

Additional professional contacts table:

K	Type	Name	Address	Postcode	Phone	Email	Information	GP Code	City	Fax	Prac
<input type="checkbox"/>	Gene AD AM	123 STR				makkr					

Relatives and other contacts table:

P	CC	Relationship	Name	Address	Postcode	Home phone	Mobile phone	Work phon
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Father	1	1	1	1	1	1
<input type="checkbox"/>	<input type="checkbox"/>	Mother	123	123	1	1	2	3

Alternatively, you can register a new client by scanning barcode or pressing **F4** and scanning the client's magnetic card.

If no hospital number or personal identification number is entered, Auditbase will assign a temporary ID or give a warning that mandatory data is missing. The system remembers what the last code used was and adds one. If it finds a problem with codes that have been used manually it will search for the lowest free code and use that one. You can change the temporary ID number any time by clicking **Edit ID**.

You can also select a client by filling in client ID. The information for the client will be displayed. You can only enter data in this field when no client is currently selected or you have pressed the **New** button. When filling in client ID, the information will be displayed in the window.

If PAS link has been set up, you use **PAS update** to look up a client in the Patient Administration System and transfer the data.

- To print a label, click **Label**.
- To view technical details such as creation date, modification time, internal ID, GUID for the client select the **File -> System information** menu item.
- To print demographic and other data presented on the screen, select **File->Print**.

When saving a new patient, Auditbase will offer to verify it automatically.

- Choose a verification status in the dropdown list and then **Save**. The Verification status will be set with the User and date and time of the verification.
- A patient identifier can also be verified after the patient has been saved by pressing the **Edit ID** button.


Dialog box titled "Edit ID" with a close button (X). The dialog contains two tabs: "Hospital no." and "NHS no.". Below the tabs, there are two buttons: "Save" and "Cancel". The "NHS no." tab is active, showing a "Current value" field with the text "7777777777". Below this is a "Change to" field with the text "5555555555" and a checked checkbox. Below the "Change to" field is an unchecked checkbox labeled "Generate temporary ID". A "Verification" section contains a "Status" dropdown menu with the text "01, Number present and verified", a "User" field with the text "SYSTEM ADMINISTRATOR", and a "Date" field with the text "09/01/2020 14:19:03".

- Choose from 8 different verification statuses in the drop-down box.
- The verification status is removed by choosing the empty line in the drop-down box.
- Click **Save**.

*If your system administrator has enabled that only verified NHS numbers will be printed, then the NHS number will not appear on any printouts, reports or letters unless it has the right verification status.*

- The verification status and details can also be viewed on the **System information** dialog for any client, opened from the **File** menu on the **Client information** screen.

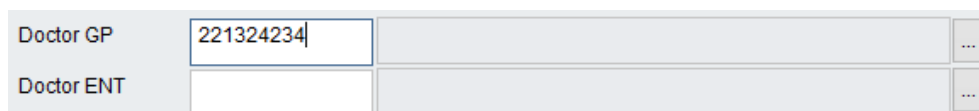
## 2.9 Adding a doctor to the client information

- Open **Client information**.
- Click the Browse button  next to the Doctor GP/ENT field.




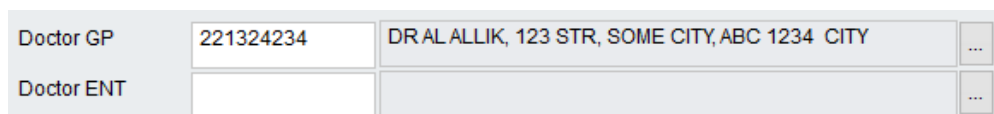
The screenshot shows a form with four fields: Doctor GP, Doctor ENT, Civil status, and Signif. other. The Doctor GP field has a dropdown menu open with the following options: Create new, Search all, Select from list, and Clear field. A mouse cursor is pointing at the dropdown menu.

- When the flag **Enable GP/ENT code in main screen** is set in the Admin tool (**Client related > Client definitions > Client module**), it is possible to specify a doctor by filling in the GP code.



The screenshot shows the form with the Doctor GP field containing the text '221324234'. The Doctor ENT field is empty. Both fields have a grey area to their right with a three-dot menu icon.

Having entered the GP code, click into the grey part of the field or click  to add the doctor.



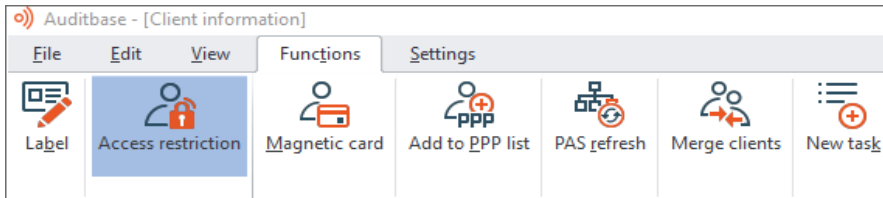
The screenshot shows the form with the Doctor GP field containing '221324234' and the Doctor ENT field containing 'DR AL ALLIK, 123 STR, SOME CITY, ABC 1234 CITY'. Both fields have a grey area to their right with a three-dot menu icon.

- **Search all** or **select from the list**.
- Double-click the doctor to add to the client information.
- If the doctor does not appear on the list already, add the doctor by choosing **Create new** and filling in the form.
- To delete a doctor from the Client information, click the button next to the Doctor GP field and select **Clear field**.

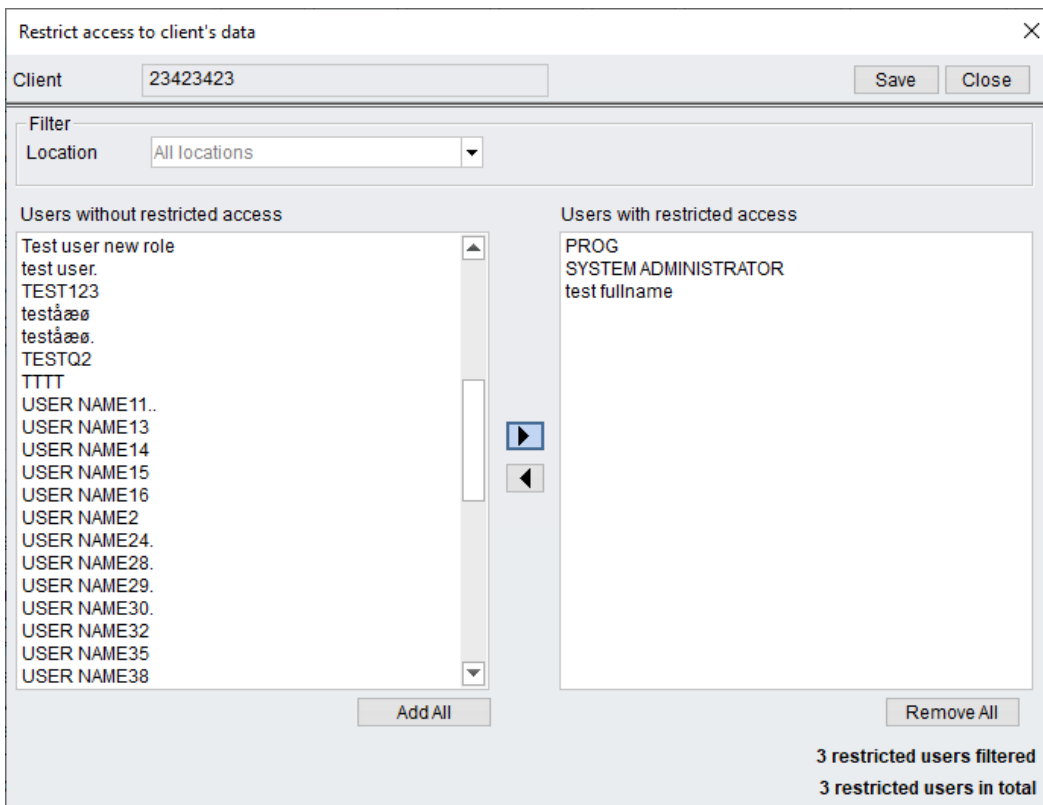
## 2.10 Client Access Restriction

Restrict which users have access to specific clients' information in Auditbase. You will need extended user rights to be able to restrict users' access to a client or to be able to override any restrictions in place.

- Select **Client Information** for the client you wish to restrict access to.
- Select the **Functions** ribbon to display the **Access restriction** icon.



A pop up will display, allowing restrictions to be put in place.



Select the users you wish to restrict and use the arrow to move them to the restricted column. All users will be displayed and can be filtered on location for fast selection. You can check the **Select All** checkbox if you wish to restrict access to all users in the list.

**Save** this and all users moved to the restricted access column will no longer be able to view Auditbase records for the selected client.

The restricted user will be able to see the client listed on the waiting list, referral overview and on the booking screen. If restricted users attempt to select the client, an information box will appear advising of the restriction in place.

If the user has the further extended right they can break the restriction which will be logged as a security event. Users can be denied access to view details of patients who are not associated with their Locations or Departments.

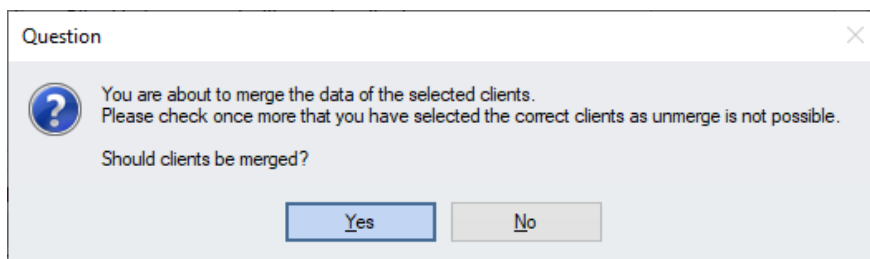
If the user has the further extended right they can break the restriction which will be logged as a security event.

## 2.11 Merge Clients

To merge two records for a client, use **Functions -> Merge clients**. Your System Administrator must provide you with the extended user permissions. Merges are logged in the Security Log.

After **Merge clients** has been selected, the currently selected client will become a Major client for merge. If the selected client should be the **Minor** one, then use the **Select** buttons to reselect as **Minor** and to select a different **Major**. If no client was pre-selected, use the **Select** button to search for a client.

The details of the record you want to keep are shown in the top boxes; the lower boxes are the record which will be removed upon completion of the merge. It is important that you get these the correct way around. The client can be chosen using the **Select** button. This will bring up the standard **Client search** window and a client can be selected in the usual way. Once both records have been selected, the **Merge** button becomes active. A warning message is displayed to ensure that you have selected the proper records, the correct way around.



If this is correct, select **Yes** and the records will be merged.

*If a **Minor** patient has been selected by another Auditbase user and is in active use, then an error message will appear. This will not prevent the merge from taking place if **Yes** is selected however this will affect any data which is being managed by the other user.*

The merge process may take some time. The cursor changes into an hourglass while the merge is ongoing. Once the cursor changes back to an arrow, you can continue working in Auditbase.

A further message will display the **Case number** that will be lost when the client is merged. It is recommended to record this number if you later need to apply it to the merged Major client.

Besides demographic data, the merged client will also contain the following data where it exists for either of the clients:

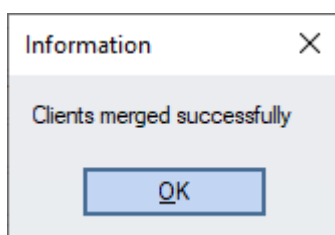
- Audiogram (Including Noah sessions)
- Journal data
- Ear mould
- Tinnitus
- Stock
- Booking data
- Observations and procedures
- Hearing therapist report

- Documents
- Referral
- Implant
- Repair list
- Surgery
- Tests
- Clinical actions
- Waiting list
- Invoice
- Task list
- Adult assessment questionnaire

If both clients have any of the below data, the user will be notified that the merge is not possible until the record on one of the clients is removed:

- Open PPP sessions
- Bone Anchored Hearing Aid questionnaire
- Direct referral HA (Adult) data
- Open waiting list entries with the same type
- Paediatric data – If a client has Paediatric data, the following warning will be displayed "Both the Major and the merge client have a Paediatric Module record, only the record belonging to the Major will be retained after merging. Please ensure you have copied all important data from the Paediatric Module record of the client to be merged into the Paediatric Module record of the Major client before merging". When this is done you can proceed with the merge.
- COSI data for the same date
- Direct Referral - medical data for the same date
- Hearing Attitudes in Rehabilitation data for the same date
- Satisfaction with Amplification in Daily Life data for the same date
- Auditory Lifestyle and Demand Questionnaire data for the same date
- Abbreviated Profile of Hearing Aid Benefit (Initial or Follow up) data for the same date
- Attitude, Motivation, Expectation Questionnaire (Re-assessment) data for the same date
- Attitude, Motivation, Expectation Questionnaire (New) data for the same date
- Q3 questionnaire data for the same date
- Questionnaire for IHR Family Hearing Aid Benefit data for the same date
- Hearing Aid and Programme Selection questionnaire data for the same date
- International Outcome Inventory for Hearing Aids questionnaire data for the same date
- Hearing Direct Routine Follow-up questionnaire data for the same date
- Both clients have records in the same waiting list

Once the merge is done, the **Information** window appears.



The record that was merged is then removed.

When a user has removed the data from one of the clients via the Auditbase application, the merge will be possible, and the data left will be available for the client.

## 3 Referrals

*Click the button below to access our training materials.*

eLearning

The Referral module is opened from **Navigation** -> **Referral** or **Shift+Ctrl+F**. If the module is opened with no client pre-selected, then it opens on the **Referral overview** tab. If a client is selected, the module opens on the Client's referral tab and displays the Client's latest existing referral. If a different tab is selected and then a different module, Auditbase will open this selected tab when the Referral module is re-opened.

### 3.1 Referral overview

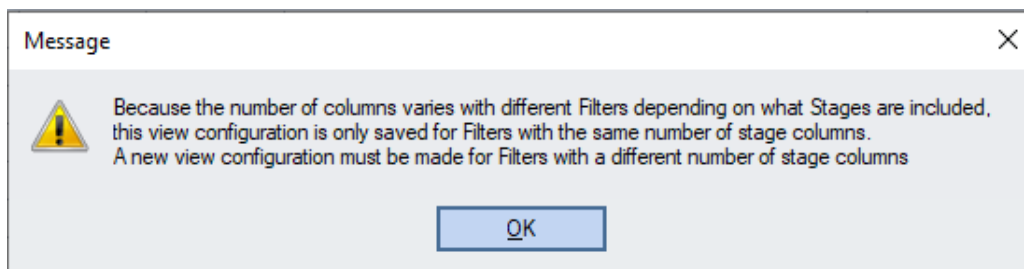
#### Columns

The columns available contain most of the fields on the Client’s referral tab, such as:

- Current stage
- Active length
- Assessment
- Status – (Outcome status)
- Clock action
- RTT end date
- RTT end status
- Previous and Next appointments– shows appointment status as well as date.
- Latest appt date and Next appt date – shows only the date, for easier chronological sorting.
- Latest appointment outcome
- Medical Priority
- Waiting List – (If referral is attached to one (Must be activated in System administration))

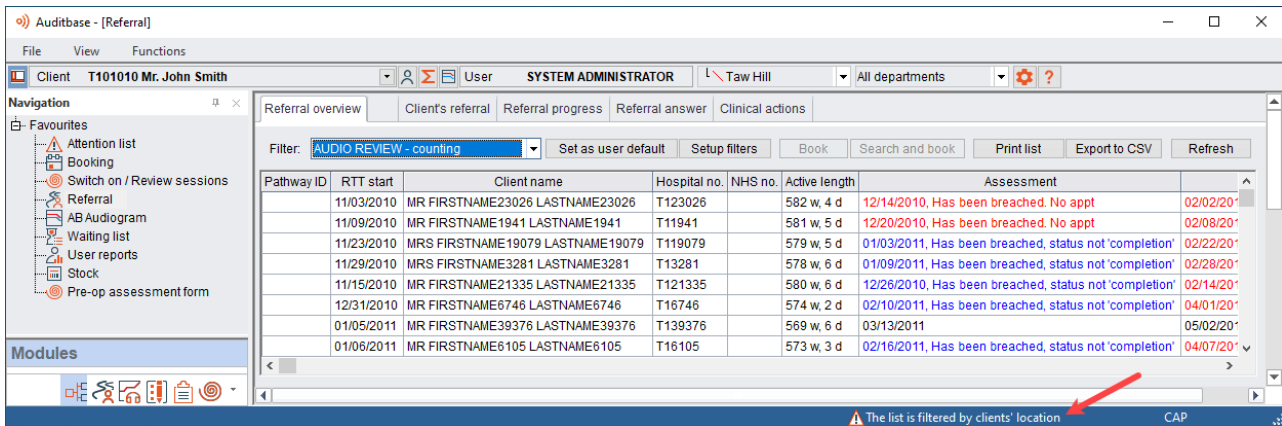
Pathway ID	RTT start	Client name	Hospital no.	NHS no.	Active length	Assessment	Treatment
	11/03/2010	MR FIRSTNAME23026 LASTNAME23026	T123026		582 w, 4 d	12/14/2010, Has been breached. No appt	02/02/2011, Has been breach
	11/09/2010	MR FIRSTNAME1941 LASTNAME1941	T11941		581 w, 5 d	12/20/2010, Has been breached. No appt	02/08/2011, Has been breach
	11/23/2010	MRS FIRSTNAME19079 LASTNAME19079	T119079		579 w, 5 d	01/03/2011, Has been breached, status not 'completion'	02/22/2011, Has been breach
	11/29/2010	MRS FIRSTNAME3281 LASTNAME3281	T13281		578 w, 6 d	01/09/2011, Has been breached, status not 'completion'	02/28/2011, Has been breach
	11/15/2010	MR FIRSTNAME21335 LASTNAME21335	T121335		580 w, 6 d	12/26/2010, Has been breached, status not 'completion'	02/14/2011, Has been breach
	12/31/2010	MR FIRSTNAME6746 LASTNAME6746	T16746		574 w, 2 d	02/10/2011, Has been breached, status not 'completion'	04/01/2011, Has been breach
	01/05/2011	MR FIRSTNAME39376 LASTNAME39376	T139376		569 w, 6 d	03/13/2011	05/02/2011
	01/06/2011	MR FIRSTNAME6105 LASTNAME6105	T16105		573 w, 3 d	02/16/2011, Has been breached, status not 'completion'	04/07/2011, Has been breach
	01/06/2011	MRS FIRSTNAME29548 LASTNAME29548	T129548		573 w, 3 d	02/16/2011, Has been breached, status not 'completion'	04/07/2011, Has been breach
	01/07/2011	MRS FIRSTNAME2741 LASTNAME2741	T12741		573 w, 2 d	02/17/2011, Has been breached, status not 'completion'	04/08/2011, Has been breach
	01/07/2011	MRS FIRSTNAME6232 LASTNAME6232	T16232		573 w, 2 d	02/17/2011, Has been breached, status not 'completion'	04/08/2011, Has been breach

The order these columns are shown can be adjusted by clicking under the column heading and dragging the column to the desired position. This can be saved for future viewing by right clicking anywhere on the grid and choosing **Save user view**. An information window then informs you that you need to have the same number of stages to use this view for another filter.



If a user has a **Location** or **Multiple locations** selected, the results will be further filtered by the client’s **Location** and they will not see all records. When **Location** is selected globally, the

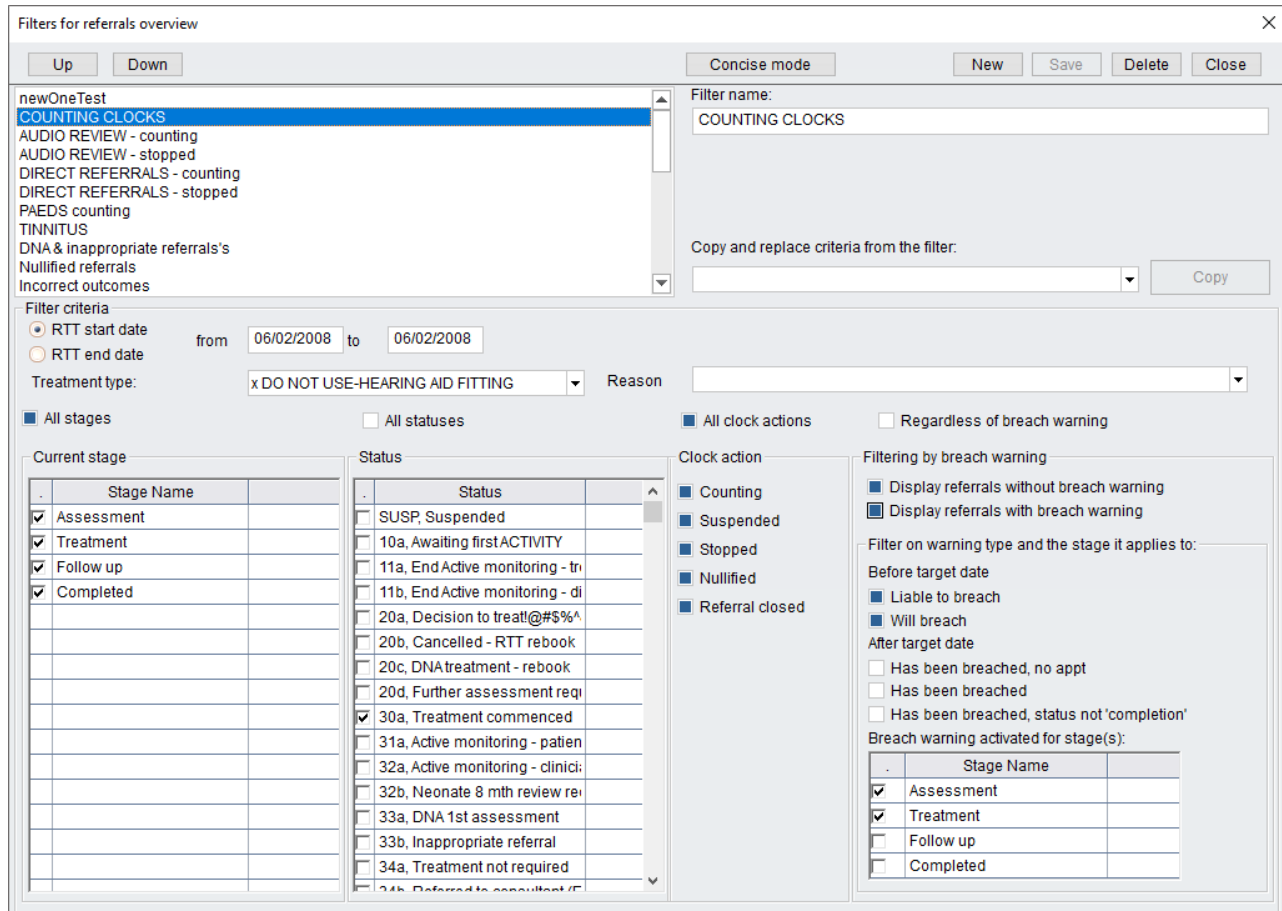
corresponding message will appear on the status bar, informing that the "List is filtered by clients' location".



If the user wants to see all clients, they should change to **All Locations**.

### 3.2 Referral filters

A number of different filters can be set up so that the referrals can be viewed in many ways. Click on **Setup filters** to define filters.



This window can be seen by all users but the filters can only be edited and saved by users with the extended user right for this.

To use an existing filter as a template, choose it from **Copy and replace criteria from the filter** and click **Copy**.

To set up a new filter, click **New**.

The window can be viewed in **Concise mode** or **Advanced mode**.

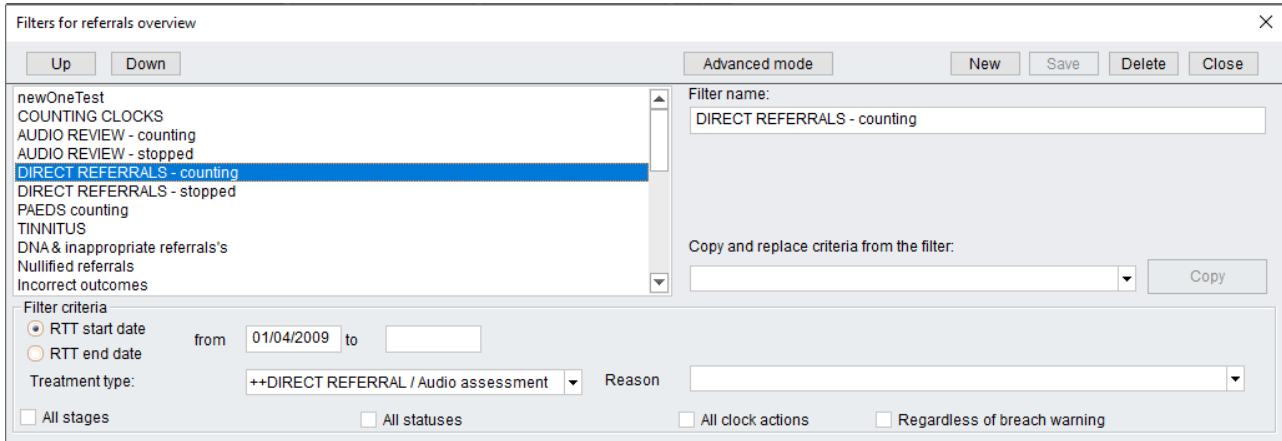
There is an option to filter on **RTT end date** instead of **RTT start date**.

Existing filters will retain the original settings of **RTT start date**.

Newly created filters will default to using the **RTT end date** criteria but either start date or end date can be selected.

If RTT end date is selected then only referrals that have an RTT end date within the date parameters selected will populate. Multiple results will be shown if all end dates are within the date period selected.

### Concise mode



Parameters are made simpler in concise mode by checking the boxes for stages, statuses, clock actions and breach warning boxes to show all or no options.

### Advanced mode

A more detailed filter can be created using the **Advanced mode** button and selecting specific stages, outcomes, clock actions or breach warnings.

Filters for referrals overview
✕

Up Down
Concise mode
New Save Delete Close

newOneTest  
COUNTING CLOCKS  
AUDIO REVIEW - counting  
AUDIO REVIEW - stopped  
**DIRECT REFERRALS - counting**  
DIRECT REFERRALS - stopped  
PAEDS counting  
TINNITUS  
DNA & inappropriate referrals's  
Nullified referrals  
Incorrect outcomes

Filter name:  
DIRECT REFERRALS - counting

Copy and replace criteria from the filter:  
 Copy

Filter criteria

RTT start date from 01/04/2009 to

RTT end date

Treatment type: ++DIRECT REFERRAL / Audio assessment Reason

All stages  All statuses  All clock actions  Regardless of breach warning

Current stage

Stage Name
<input checked="" type="checkbox"/> Assessment
<input checked="" type="checkbox"/> Treatment
<input type="checkbox"/> Follow up
<input type="checkbox"/> Completed

Status

Status
<input type="checkbox"/> SUSP. Suspended
<input checked="" type="checkbox"/> 10a, Awaiting firstACTIVITY
<input type="checkbox"/> 11a, End Active monitoring - tr
<input type="checkbox"/> 11b, End Active monitoring - di
<input type="checkbox"/> 20a, Decision to treat@#5%^
<input type="checkbox"/> 20b, Cancelled - RTT rebook
<input type="checkbox"/> 20c, DNA treatment - rebook
<input type="checkbox"/> 20d, Further assessment req
<input type="checkbox"/> 30a, Treatment commenced
<input type="checkbox"/> 31a, Active monitoring - patien
<input type="checkbox"/> 32a, Active monitoring - clini
<input type="checkbox"/> 32b, Neonate 8 mth review re
<input type="checkbox"/> 33a, DNA 1st assessment
<input type="checkbox"/> 33b, Inappropriate referral
<input type="checkbox"/> 34a, Treatment not required
<input type="checkbox"/> 34b, Deferred to consultant (F

Clock action

Counting

Suspended

Stopped

Nullified

Referral closed

Filtering by breach warning

Display referrals without breach warning

Display referrals with breach warning

Filter on warning type and the stage it applies to:

Before target date

Liable to breach

Will breach

After target date

Has been breached, no appt

Has been breached

Has been breached, status not 'completion'

Breach warning activated for stage(s):

Stage Name
<input checked="" type="checkbox"/> Assessment
<input checked="" type="checkbox"/> Treatment
<input type="checkbox"/> Follow up
<input type="checkbox"/> Completed

Note: Both Clock action and Referral outcome status need to be completed to show the correct data set of patients.

You can also choose to view **All** referrals from the Referral overview tab, which is likely to take a long time to populate as it will include all referrals ever created. For this reason, **All** cannot be selected as the default filter with the **Set as user default** button. Any other filter can be set as your user default.

Once a filter or the **Refresh** button has been selected, a progress bar will be displayed. This bar shows the total number of records that meet the criteria; it also shows the number of records that have been processed or completed and the number that have been found in the search so far.

Pathway ID	RTT start	Client name	Hospital no.	NHS no.	Active length	Assessment	
	02/11/2010	MST FIRSTNAME33372 LASTNAME33372	T133372		479 w, 2 d	13/12/2010, Has been breached. No appt	01/02/20
	08/11/2010	MST FIRSTNAME46057 LASTNAME46057	T146057		478 w, 3 d	19/12/2010, Has been breached. No appt	07/02/20
	12/11/2010	MISS FIRSTNAME46130 LASTNAME46130	T146130		477 w, 6 d	23/12/2010, Has been breached. No appt	11/02/20
	15/11/2010	MST FIRSTNAME46153 LASTNAME46153	T146153		477 w, 3 d	26/12/2010, Has been breached. No appt	14/02/20
	06/12/2010	MISS FIRSTNAME45916 LASTNAME45916	T145916		474 w, 3 d	16/01/2011, Has been breached. No appt	07/03/20
	14/12/2010	MISS FIRSTNAME46544 LASTNAME46544	T146544		473 w, 2 d	24/01/2011, Has been breached. No appt	15/03/20
	15/12/2010	MST FIRSTNAME46553 LASTNAME46553	T146553		473 w, 1 d	25/01/2011, Has been breached. No appt	16/03/20
	16/12/2010	MST FIRSTNAME43958 LASTNAME43958	T143958		473 w, 0 d	26/01/2011, Has been breached, status not 'completion'	17/03/20
	20/12/2010	MST FIRSTNAME29636 LASTNAME29636	T129636		472 w, 3 d	30/01/2011, Has been breached, status not 'completion'	21/03/20
	20/12/2010	MST FIRSTNAME36584 LASTNAME36584	T136584		472 w, 3 d	30/01/2011, Has been breached, status not 'completion'	21/03/20

Click on **Book** or **Search and book** to book a client's appointment directly from the overview screen.

When booking an appointment directly from the referral overview, you will receive a breach warning, if so configured by your system administrator, if the date is set to exceed the target for the current stage. Click **OK** to continue and book the appointment regardless or **Cancel** to go back and change the date.

You can export the Referral overview to CSV by clicking **Export to CSV**.

To print the filtered list, click on **Print list**.

The **Print list** function is best used if you want an overview of one patient, whereas the **Export to CSV** function is best used if you want an overview of several patients or specific information such as stages or outcome statuses.

To see changes to the list, click on **Refresh**.

### 3.3 Client's referral

When the client's details have been saved, an initial referral must be created.

Use the **Referral** dialog to record the referral from a GP or ENT clinic to an audiologist or a referral from an audiologist to hearing therapy.

Statistics on referrals is available in the **Booking** module.

Client's referral tab can have a single or a split view.

If configured in administration, **Referral progress information** can be displayed on a separate tab.

#### SPLIT VIEW

Referral overview | 
 Client's referral | 
 Referral progress | 
 Referral answer | 
 Clinical actions

Referrals: 104762, 04/23/2010, PAEDIATRIC hearing aid journey (PHAC) | 
 Client name: MST FIRSTNAME417 LASTNAME417

Book | Search and book | Add to list | Add observation | Print referral | Print receipt | Print answer | Save | Delete

Waiting list entries Edit | Show in waiting list

Wait time	Date	Waiting list	Information
-549	11/30/2010	TGW - PHAC Temporary loss	Reassessmentreview 6 months

Appointments Edit | Show in Booking

Date	Time	Symbol	Status	Resource	Reason
11/30/2010	11:30	PA	D	Res70	.AUDIOLOGY referral
04/27/2010	09:15	PA	S	Res70	.ENT referral

Observations and procedures Detach | Edit

Obs no.	Date	Add	S	Text	Comment

Current status
 

Outcome: 32a, Active monitoring - clinician start Clock Stopped
since: 04/27/2010 12:08:55 Add new History

Comment: Auto assigned by: 27/04/2010, 32a, PHAC REASSESSMENT 3

New outcome status: 32a, Active monitoring - clinician start

Referral stages
 

Name	Target date and warnings	Current	Active length:
Assessmer	06/03/2010	<input type="checkbox"/>	0 w, 4 d
Treatment	07/23/2010	<input checked="" type="checkbox"/>	RTT end date: 04/27/2010
Follow up		<input type="checkbox"/>	RTT end date set by outcome status

32a, Active monitoring - clinician start

Referral overview | Client's referral | Referral progress | Referral answer | Clinical actions

Referrals: 104762, 04/23/2010, PAEDIATRIC hearing aid journey (PHAC) Client name MST FIRSTNAME417 LASTNAME417

Book Search and book Add to list Add observation Print referral Print receipt Print answer New Save Delete

Treatment type PAEDIATRIC hearing aid journey (PHAC) Information Edit

RTT start date 04/23/2010 Age at start 10y Reassessment review 6 months

Referral date 04/23/2010 Other date 04/23/2010

Wait time

Customer BERKSHIRE WEST PCT (RG) Client contact date

Referred by DR N CURRIE, THE SURGERY, BOCKHAMPTON ROAD, LAMB... Interview

Referring agent ref.

Reason AUDIOLOGY referral

Medical priority High

Referral handling

Put on waiting list  Booked directly

PathwayID Edit Registered by USER NAME50

SINGLE VIEW

Referral overview | Client's referral | Referral answer | Clinical actions

Referrals: 104762, 04/23/2010, PAEDIATRIC hearing aid journey (PHAC) Client name MST FIRSTNAME417 LASTNAME417

Book Search and book Add to list Add observation Print referral Print receipt Print answer New Save Delete

Selected referral

PathwayID Edit

RTT start date 04/23/2010 Age at start 10y Wait time

Referral date 04/23/2010 Other date 04/23/2010

Treatment type PAEDIATRIC hearing aid journey (PHAC)

Reason AUDIOLOGY referral

Customer BERKSHIRE WEST PCT (RG)

Referred by DR N CURRIE, THE SURGERY, BOCKHAMPTON RC...

Referring agent ref.

Medical priority High

Referral handling

Information  Put on waiting list  Booked directly Edit

Reassessment review 6 months

Interview Client contact date

Registered by USER NAME50

Current status

Outcome 32a, Active monitoring - clinician start Clock Stopped

since 04/27/2010 12:08:55 Add new History

Comment Auto assigned by: 27/04/2010, 32a, PHAC REASSESSMENT 3

New outcome status 32a, Active monitoring - clinician start

Waiting list entries Attach Detach Edit Show in waiting list

Wait time	Date	Waiting list	Information
-549	11/30/2010	TGW - PHAC Temporary loss	Reassessment review 6 months

Appointments Attach Detach Edit Show in Booking

Date	Time	Symbol	Status	Resource	
11/30/2010	11:30	D	D	Res70	AUDIOLOGY re
04/27/2010	09:15	S	S	Res70	ENT referral

Observations and procedures Detach Edit

Obs no.	Date	Add S	Text	Comment

Referral stages

Name	Target date and warnings	Current	Active length:
Assessment	06/03/2010	<input type="checkbox"/>	0 w, 4 d
Treatment	07/23/2010	<input checked="" type="checkbox"/>	RTT end date: 04/27/2010
Follow up		<input type="checkbox"/>	RTT end date set by outcome status

Primary information

- The red area in the below screen shot is the main window of the client's referral where you will find the primary information like RTT start date, Referral date, referral Reason,

etc.

- The **RTT date** is the date that will be used for calculating the Active length. This date will transfer to a Waiting list if the Waiting list is booked from the referral.
- The **Referral date** is the date when the referral letter was written or sent to your department. Auditbase automatically enters the current date, which can be edited. This date is not involved in calculations
- **Treatment type** is the pathway which the patient is following. The Treatment Type is shown in the list of Referrals a patient has had.
- **Reason** is definable and set up by the system administrator – it can be mandatory or disabled.
- **Other date** is usually used where referrals have another important date such as date of referral to ENT – this date is not used in calculations.
- **Medical priority** is used to indicate an overall medical priority for the patient besides the clinics internal waiting list priorities.
  
- **Referral handling** can be used to support extended pathways in corporation with other hospital departments. Use it to indicate how the referral has been handled, i.e. if it was accepted, denied, referred onwards etc.
- **Information** that is relevant for an appointment can be added which will be transferred to Waiting List Information. This free text can be up to 254 characters in length.

### Active length period

- In the blue ringed areas, you will find the active length period information i.e. **RTT start date, Active length** and **RTT end date**.
- The **Active length** period is directly related to the **Clock** value of the outcome **Status** of a referral and only increases when the outcome **Status** has a clock action of **Counting**.
- If it is **Suspended**, the **Active length** will not increase.
- If it is then set to **Counting** again, it will start counting from when it was suspended.
- Only 5 Suspension periods are supported by the Active length and Current Outcome feature in one referral.
- If the clock is set to **Stopped** and then to **Counting** again, it will start counting again from zero.
- Dynamic data is used to see which sub-journey (first, second, third, fourth or fifth) is current.
- If the clock is set to Nullified, nothing will show in the **Active length** field.

### Current outcome status and last appointment

- The purple areas relate to the **Current outcome status** of the client's latest appointment.
- Outcomes appearing on the Booking information drop down list represent an **Appointment** outcome. Those selected from the New outcome status list on the referral screen represent a **Referral** status. Outcomes selected from the New outcome status on a Waiting list represent a **Waiting list** status. Outcomes can transfer from appointments to waiting lists and referrals and from waiting lists to referrals if the entries are linked and

if the Outcome is configured as being applicable to these functions. I.e. if an Appointment Outcome is configured as a Referral outcome but not as a Waiting list outcome, it can transfer from the appointment to the referral but not to the waiting list. Most outcomes could be required as an Appointment, Referral and Waiting list outcome status but some, e.g. referral received and referral closed, may only be required as a Referral status.

- The **Appointment field** shows the client's last appointment including the status of the appointment.
- **Appt outcome** is the appointment outcome of the above appointment.
- In the **Status** field the current outcome **Status** assigned to the client is displayed followed by the **Clock** action and the time and date when the Status was last changed, as well as any **Comments**.
- The **New outcome status** can be changed manually or it can be set from the next appointment, if that has been set up by your System Administrator.
- To change the **New outcome status** manually, either choose a new outcome status in the dropdown list next to **New outcome status**.
- Or use the **Add new** button where a date in the past or future can be set, if the associated extended user right in System Administration, **Referral: Edit Status History**, has been enabled. Setting a date in the future is particularly useful for future patient unavailability.

The same Outcome status can be set twice or more in succession, either by using the **Add new** button or by auto-assigning from the Booking module.

Outcome statuses can be paired so that setting one outcome will immediately initiate another. This is particularly useful where a stopped status precedes a close status. For example, if a client declines treatment, you may want to stop and close their referral. This can be done by pairing these two outcome statuses. Your System Administrator will set this up and the first outcome can be selected by auto-assigning from the **Booking** module or using **Add new** as described above. These changes will be shown in **History**.

Multiple clock stops and starts can be viewed in one referral. The Target date and Active length is shown for the 'current instance', i.e. from a new clock start after a stop there is a new active length and Target date for up to five restarts, and indicates when it is not the first instance.

All outcome status changes can be found under the **History** button.

Outcome status history and journey summary			
Outcome status history			
Date	Outcome status	Clock	Comment
01/01/2022 18:38:11	100a, Referral closed	Closed	
01/01/2022 18:24:03	10a, Awaiting firstACTIVITY	Counting	
01/01/2022 17:58:48	100a, Referral closed	Closed	Standard efterfølger til '11b, End Active monitoring - discharge
01/01/2022 17:58:47	11b, End Active monitoring - discharge	Stopped	
01/01/2022 17:52:34	100a, Referral closed	Closed	Standard efterfølger til '11b, End Active monitoring - discharge
01/01/2022 17:52:33	11b, End Active monitoring - discharge	Stopped	
12/29/2021 14:56:23	11b, End Active monitoring - discharge	Stopped	
12/24/2021 18:37:54	10a, Awaiting firstACTIVITY	Counting	

Clock summary			Active length summary as of today					
Date	Clock	Duration	Journey	Start	End	In suspension	Active length	
01/01/2022	Closed	0 w, 1 d	3	01/01/2022	01/01/2022	0 w, 0 d	0 w, 0 d	
01/01/2022	Counting	0 w, 0 d	2	01/01/2022	01/01/2022	0 w, 0 d	0 w, 0 d	
01/01/2022	Closed	0 w, 0 d	1	12/24/2021	12/29/2021	0 w, 0 d	0 w, 5 d	
01/01/2022	Stopped	0 w, 0 d						
01/01/2022	Counting	0 w, 0 d						
01/01/2022	Closed	0 w, 0 d						
12/29/2021	Stopped	0 w, 3 d						
12/24/2021	Counting	0 w, 5 d						

When the client does rearrange, the appointment for the future outcome status can be found under the **History** button and can be deleted or modified and new ones can be added retrospectively.

The history dialogue shows the referral outcome status history, which can be manually modified if the appropriate extended user right is enabled. In addition, the history dialogue shows the Clock summary and Active length summary, which cannot be manually modified. If an outcome is applied that has a no change clock action, the status is shown, but there is no change to the current clock action and there are no changes to the clock summaries.

## Referral stages

Auditbase generates the referral stage from the current outcome status.

The current stage is checked in the **Current** column of the **Referral stages** table.

If the stage is incorrect and needs to be changed, it must be done by changing the outcome status to one that puts the client in the correct stage of the referral.

If the **Referral stage** is still incorrect, then inform your system administrator who can check the set up in the system administration tool.

Target dates will be shown depending on the settings entered by your System Administrator.

If clock suspensions are permitted, an outcome status that has a suspended clock action will suspend the clock. Any target dates will increase by a day for each day that the clock is in suspension. Suspension periods do not count towards the Active length total. Active length does not increase while the clock is suspended.

Depending on how your System Administrator has set up Auditbase, the **Book and Search** and **Book** buttons will default to different settings for each of these referral stages.

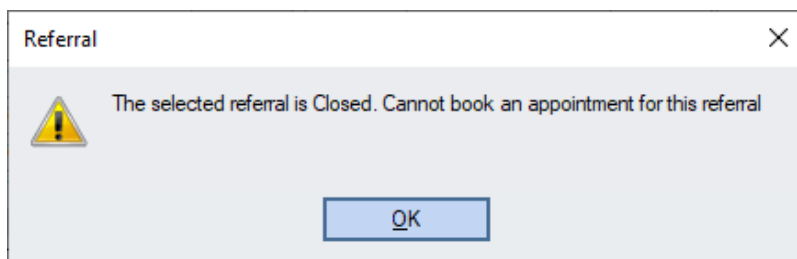
It is possible for Auditbase to be set up so that when either of these buttons is selected, the next appropriate appointment is found, with symbols etc. pre-selected.

If **Search and book** has been set up but the required appointment symbol is not listed, you need to check that you are searching for the correct appointment type and that it is appropriate to link it at this stage.

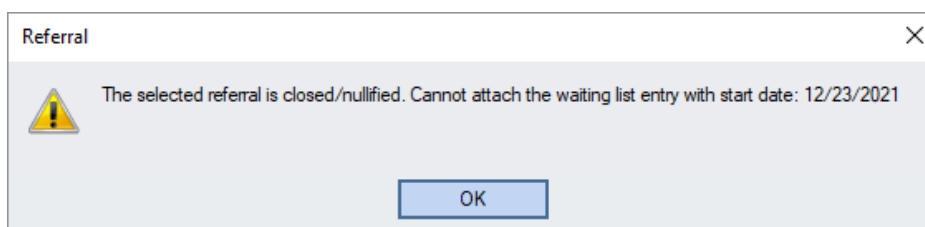
If all is correct, but the symbol is still not displaying, then **Close** the **Search and book** window and you will then be taken back to the **Referral** module.

Select **Book** and book the appointment directly, attaching the appointment to the referral as previously described – your system administrator should then be informed.

If a Referral has a Closed outcome the **Book** and **Search and Book** buttons will generate a message preventing their use. An appointment can be attached to the referral with an extended user right.



Furthermore, Waiting List entries cannot be attached to a closed referral, if a Referral has a closed outcome then the user will get an error message stating that they are unable to attach the waiting list entry.



## Waiting list entries

Click **Add to list** to open a Client to waiting list window.

Client to waiting list ×

Letter Concise mode Save Cancel

Client **Mr. John Smith**

PathwayID  Edit

Active wait  Projected wait

List **TGW - CORDA FITTINGS +2**

Initial wait  weeks ZEST **No**

Registered  Time on waiting list

Other relevant date  Edit

Information

Reason **ENT referral**

Letter printed  Print letter after saving

Current outcome status

since  Change

New outcome status

Linked referral's current outcome

since  Counting

Current stage breach date

Medical priority

Appointments Attach Detach

Date	Time	Symbol	Status	Resource

Outcome status history Add Edit Delete

Date	Outcome status	Clock

Any waiting list entries saved in this way will appear on the **Waiting list entries** table at the top right of the main referral screen.

Waiting list entries Attach Detach Edit Show in waiting list

Wait time	Date	Waiting list	Information
8	12/29/2021	TGW - FOLLOW UP 3	
-1	12/24/2021	TGW - Audio Review +1	GP LETTER
25	12/24/2021	TGW - PHAC Temporary loss	
-1	12/24/2021	TGW - CORDAFITTINGS +2	

The waiting list entry is saved with current time as the registration time whether the entry is made in the Waiting List module or the Referral module so that clients are sorted in the correct arrival time order on the waiting list if used for walk-in clinics.

Therefore, when a Waiting List entry is made from an existing Referral then on the Waiting List entry, the Date will default to when the Referral was made, but the time will default to when the Waiting List entry was made.

If you create a waiting list entry directly in the **Waiting list** module, it will not be linked to a referral unless you have auto-linking enabled by your system administrator.

You can link it using the **Attach** button, which will open a window with a table showing existing waiting list entries that could be linked to the referral.

Attach WL entry to referral

Select Cancel

Treatment type: All

Date	Pathway ID	Waiting list	Status	Referral	Treatment type
12/25/2021		TGW - DOMI follow up 3			ENT Hearing aid referral
12/24/2021		TGW - PHAC Temporary loss		109548, 12/24/2021	ENT Hearing aid referral
12/24/2021		NHSP - 8 month follow up			ENT Hearing aid referral
12/24/2021		TGW - CORDAFITTINGS +2		109548, 12/24/2021	ENT Hearing aid referral
12/24/2021		TGW - Audio Review +1		109548, 12/24/2021	ENT Hearing aid referral
12/24/2021		TGW - SPEECH AUDIO 1			ENT Hearing aid referral

If a mistake has been made and the waiting list entry should not be attached to this referral, the **Detach** button on the main referral screen can be used to select and detach a waiting list entry.

Click the **Edit** button to edit the selected waiting list entry and the **Show in waiting list** button to open the waiting list that the selected entry is part of.

*Note:*

*If the 'Keep client's entries on waiting list after booking an appointment' box has been checked in the system administration tool, a client waiting list entry will remain until they are deleted manually from the waiting list.*

*If an appointment has been booked for this client and then they are deleted from the waiting list, any appointments associated with that waiting list entry remain attached to the referral. This is explained in an information message when deleting from the waiting list.*

*To prevent confusion at a later date, the appointment which remains attached to the referral can be detached manually, if required using the Detach button on the Appointments section.*

**Appointments**

The Appointments table at the right shows all the appointments linked to this referral. This includes:

- Any appointments created from a waiting list entry that is linked to this referral.
- Any appointments created directly from this screen from the **Book** or **Search and book** buttons.
- Any appointments created in the booking screen when the window opens to link the appointment to a referral.
- Any appointments added to the referral by the **Attach** button from this screen. This includes cancelled appointments from the **Cancellation History**.

Appointments Attach Detach Edit Show in Booking

Date	Time	Symbol	Status	Resource	Reason
01/01/2022	12:00	Ⓜ	*	Charlie	ENT referral
12/28/2021	10:00	Ⓜ	*	Charlie	ENT referral
12/28/2021	10:00	Ⓜ	*	Travy	ENT referral
12/25/2021	09:45	Ⓜ	*	Stassy	ENT referral

If a mistake has been made and the appointment should not be attached to this referral, select the appointment and click on **Detach**.

Right-click on an appointment to open the **Booking information** window.

Click the **Show in booking** button to open the selected appointment in the Booking module and the **Edit** button to edit the selected appointment in the **Edit appointment** window for that appointment.

### Observations and procedures

The **Observations and procedures** table at the right shows all the observations and procedures linked to this referral including:

- Any observation or procedure created on the **Appointment information** window of any appointment linked to this referral.
- Any existing observation or procedure linked directly to this referral from the **Add observation** button on this screen.

Observations and procedures						Detach	Edit
Obs no.	Date	Add	S	Text	Comment		
126	12/24/2021			Otoscleros			

Select an observation or procedure and click on **Edit** to edit it.

If a mistake has been made and the observation or procedure should not be attached to this referral, select it in the table and click on **Detach**.

### Print Receipt

You may wish to send an acknowledgement of referral to the referrer or client. Click the Print Receipt button and the letters dialog will open displaying those templates that have been authorized for use as a receipt. Select the letter you wish to use from the table and open, preview or print/email it.

Referral receipt templates are created in the letters module (Booking → Functions → Settings → Letters) and should be marked as Available for Referral receipt.

### 3.3.1 Quick referral creation

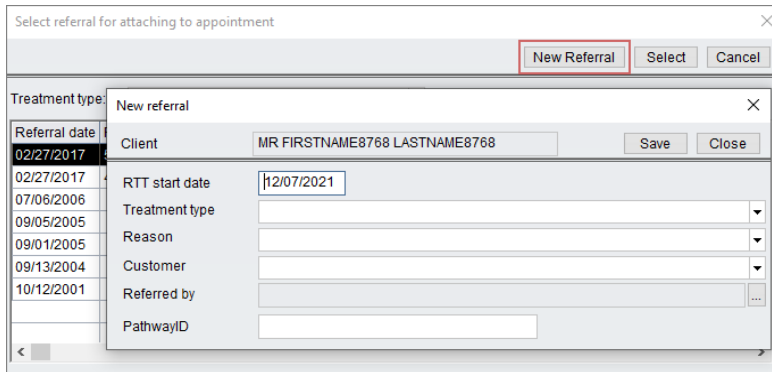
If the referral does not exist or an existing one cannot be used, you can create a new 'quick' referral.

This option is available for:

- Booking (when Referral linking to an appointment is mandatory for that appointment type)
- Waiting list linking to referral
- Surgery
- Implant screens
- Client module (Implant tab)

To create a quick referral:

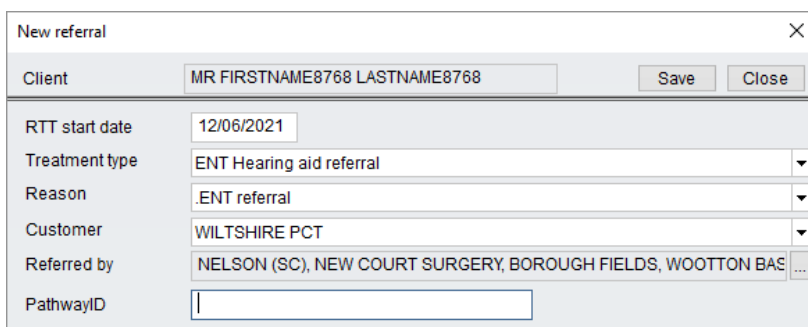
- In the Booking and Waiting list modules, click **New Referral**



- In the Surgery and Client modules as well as Implant screens, click **...** and then **New** to the right of the Referral field.



- Select the relevant options for **Reason**, **Customer** and **Referred by** fields.



- Save.

For convenience and ease of use, the system administrator can configure default values for **Reason**, **Customer** and **Referred by** dependent on the **Treatment Type**.

*Note that Reason may not be shown if disabled in Administration.*

## 3.4 Referral answer

After saving a referral, you can enter and print an answer.

- Enter the **Date**.
- Type the answer text.
- Click Print answer.

*When the answer has been saved, it may be disabled for editing, if this is defined by the system administrator.*

The screenshot shows the 'Referral answer' tab in the Auditbase application. The interface includes a navigation bar with tabs: 'Referral overview', 'Client's referral', 'Referral progress', 'Referral answer', and 'Clinical actions'. Below the navigation bar, the 'Referrals:' section displays '109548, 12/24/2021, ENT Hearing aid referral' and 'Client name: Mr. John Smith'. A toolbar contains buttons for 'Book', 'Search and book', 'Add to list', 'Add observation', 'Print referral', 'Print receipt', 'Print answer', 'Save', and 'Delete'. The 'Date' field is set to '12/25/2021' and the 'User' field is set to 'SYSTEM ADMINISTRATOR'. The main content area is a large, empty text input field.

### 3.5 Clinical actions

This tab lists the clinical actions which have occurred within one of the appointments that are linked to the referral.

The type of actions to be caught are configured in the System Administration tool.

Referral overview						Client's referral						Referral progress						Referral answer						Clinical actions																																															
Referral												109548, 12/24/2021, ENT Hearing aid referral												Client name												Mr. John Smith																																			
																								Refresh												Detach												View audiogram												Open											
Action date	Appt.date	Stage	Appt. symbol	Action type	Description																																																																		
12/24/2021	12/25/2021	Assessment	ENT new patien	Stock: Lend out article	NHS HEARING AID (Serial No.), NHS SUPPLIES, BE101G, RFG312																																																																		
12/24/2021	12/25/2021	Assessment	ENT new patien	NOAH action																																																																			
12/24/2021	12/25/2021	Assessment	ENT new patien	Audiogram	12/24/2021, no. 1, Aided																																																																		
12/24/2021	12/25/2021	Assessment	ENT new patien	OtoSurgery Pre-op																																																																			
12/25/2021	12/25/2021	Assessment	ENT new patien	BKB test																																																																			
12/24/2021	12/25/2021	Assessment	ENT new patien	Document	Headed letter template																																																																		

Clinical actions may have a description, either entered manually or generated automatically by the system.

For example, a Glasgow questionnaire has an automatically generated description which contains the abbreviated questionnaire type and the values of global scores; the earmould impression description is in the form of "L: Name, Material; R: Name, Material", where L/R stands for the left/right mould, Name – the name of the mould, and Material – the material of the mould.

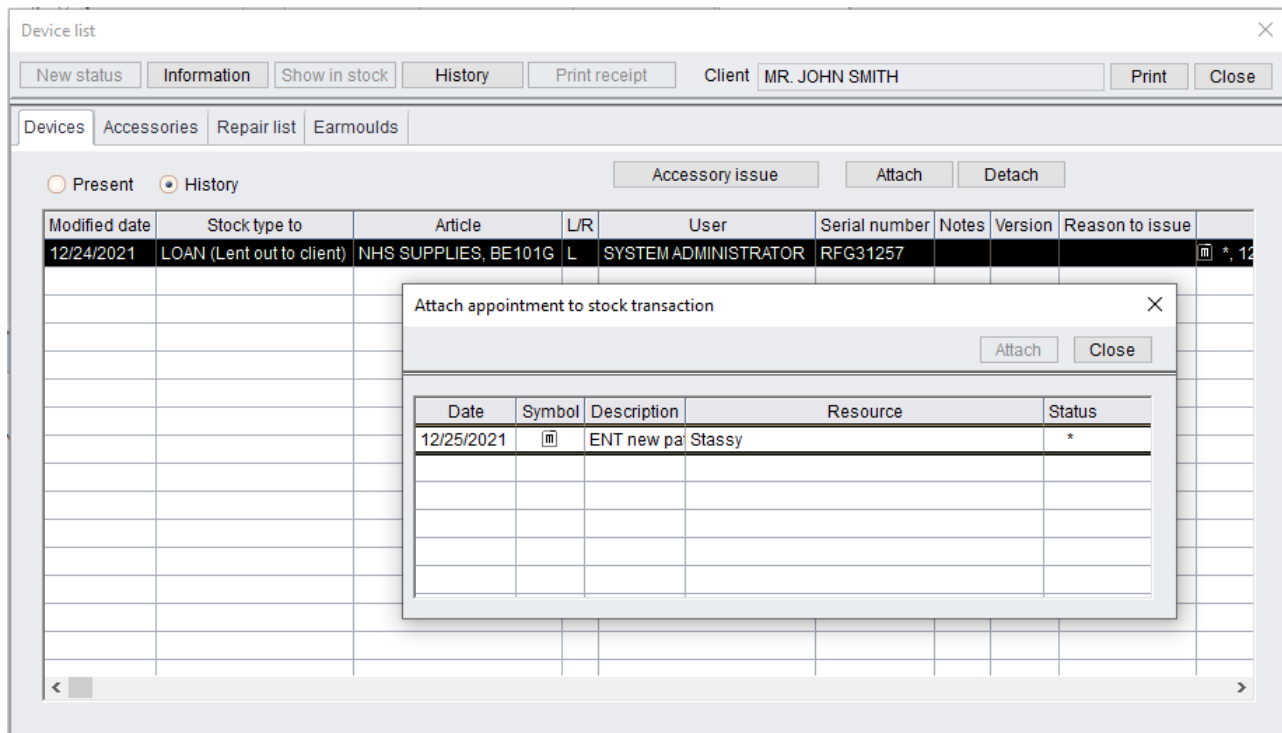
The **Refresh** button will re-populate the list of clinical actions.

Any clinical actions that are not required can be removed from the list using the **Detach** button.

Any saved audiograms can be viewed by selecting the **View audiogram** button.

Any action can be viewed by selecting it and clicking on the **Open** button – this will open the required module/page in Auditbase so that details can be read.

For example, for a clinical action related to stock, the **Device list** dialogue box will open where you can review devices, accessories, earmoulds and repair tasks, as well as attach an appointment to the stock transaction.



If you try to delete an appointment which has **Clinical actions** attached to it, you will get a message and will not be allowed to delete the appointment.

To delete the appointment, you must first detach the **Clinical actions**:

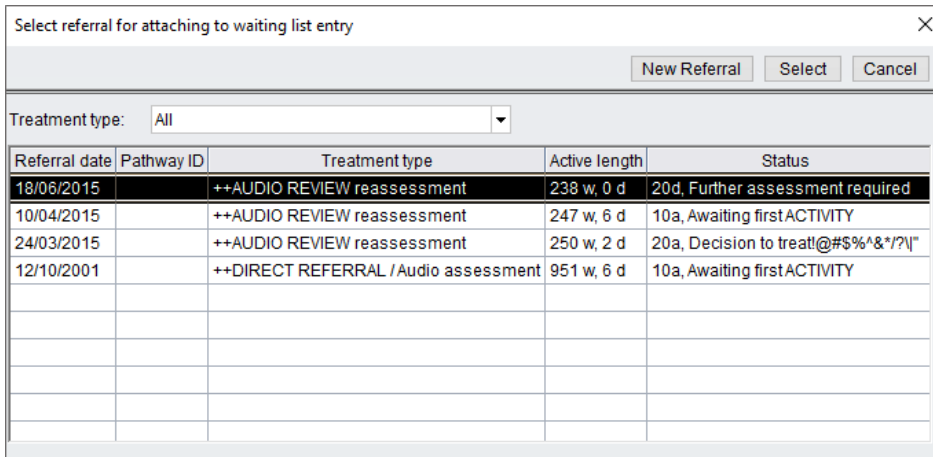
- Select the action and then **Detach**.
- You will be asked if you want to add this action to another appointment or not.
- Select the appropriate option and continue until all actions have been detached.
- You can now return to the **Booking** module and delete the appointment.

*NOTE: If a clinical action is created that requires an appointment to be attached to it—this is defined in the system administration tool — the most relevant appointment will be added. If only one appointment occurs for the patient that day, and the appointment start time is earlier than the current time, then the action will be attached to that appointment. If it is not clear which is the most relevant, for instance if there is more than one appointment on the same day or none that day, an information box will appear asking you to **Attach** the most appropriate appointment.*

### 3.6 Linking Bookings and Waiting lists to Referrals

When making certain appointments directly in the booking screen or when making a waiting list entry directly in the waiting list module, Auditbase can pop-up a window requesting you to link this to an existing referral or make a new one.

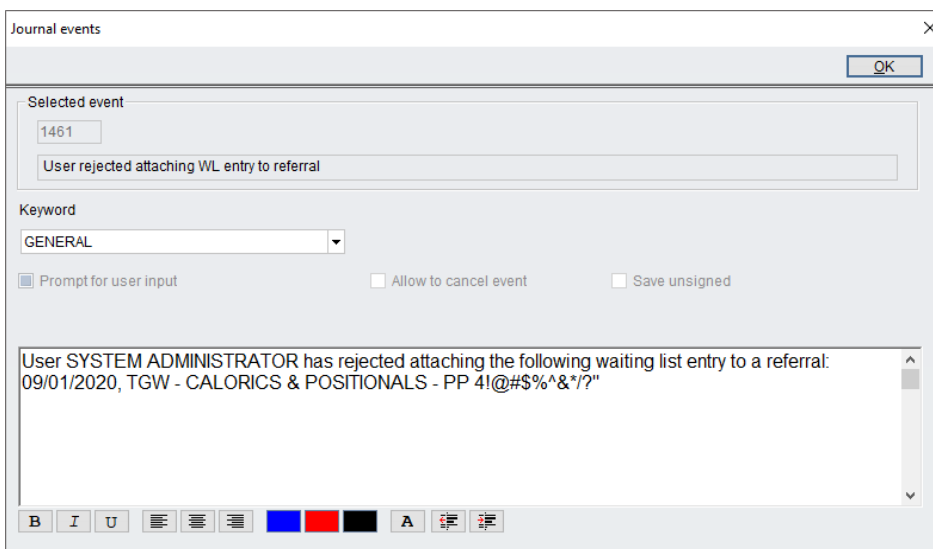
This can be configured in the System Administration tool, as well as whether this window can be cancelled.



All referrals are shown in date order – Auditbase will, by default, select the most recent referral.

- If necessary, you can create a ‘quick’ referral by clicking the **New Referral** button. See details in [Quick referral creation](#).

If it is allowed to be cancelled, then an Automatic Journal Event may be generated and opened to accept some text explaining why the appointment or waiting list was not linked to a referral.



If your System Administrator has set that you may not cancel, you must link the appointment or waiting list entry to a referral or make a new referral.

### 3.7 Referral statistics

The referral statistics are accessed from the Booking module under **Functions -> Referral statistics**.

Referral statistics ordinary						
RTT start date from		<input type="text" value="01/01/2019"/>	to	<input type="text" value="09/01/2020"/>	<input type="button" value="Show"/>	<input type="button" value="Close"/>
Treatment type	Customer	+ New	+ Waiting list	+ Booked	- Booked & WL	= Total
++DIRECT REFERRAL / Audio	BERKSHIRE WEST PCT (RG)	0	0	1	0	1
++DIRECT REFERRAL / Audio	GLOUCESTERSHIRE PCT (GL)	0	1	2	1	2
++DIRECT REFERRAL / Audio	BRISTOL PCT	0	0	1	0	1
++DIRECT REFERRAL / Audio	Auto-created customer with cod	0	0	1	0	1
++AUDIO REVIEW reassessm	SWINDON PCT	1	2	2	1	4
++AUDIO REVIEW reassessm	GLOUCESTERSHIRE PCT (GL)	1	0	0	0	1
++AUDIO REVIEW reassessm	BATH & NE SOMERSET	0	1	1	1	1
++AUDIO REVIEW reassessm	FORCES-UK	0	1	1	1	1
++AUDIO REVIEW reassessm	SURREY PCT	0	1	1	1	1
++AUDIO REVIEW reassessm	Auto-created customer with cod	0	1	1	1	1
++TINNITUS	FORCES-UK	1	0	0	0	1
x DO NOT USE-OAE	Auto-created customer with cod	0	0	1	0	1
x DO NOT USE-BATTERIES	BUCKINGHAM PCT	1	0	0	0	1
++NEONATAL ASSESSMENT	OXFORDSHIRE PCT (OX)	0	1	1	1	1
++FITTING - from previous refe	WILTSHIRE PCT	0	0	1	0	1
++FITTING - from previous refe	ABCD	0	0	1	0	1
++FITTING - from previous refe	Auto-created customer with cod	1	0	0	0	1

#### 3.7.1 Referral ordinary statistics

An overview of referrals at a given time is listed by selecting **Functions -> Referral statistics -> Ordinary statistics** from Booking.

Period from/to can be entered and information such as treatment type, customer, indication of number of new referrals, how many are put on waiting list/booked directly together with the total number, are listed when hitting **Show**.

Symbols of + and - are added over the columns to indicate how the total number is calculated. The total number of referrals is calculated based on **New** referrals plus referrals put on a **Waiting list** plus referrals **Booked** directly from an appointment minus referrals both from a waiting list and a booked appointment.

#### 3.7.2 Referral advanced statistics

Access Referral statistics advanced via **Functions->Referral statistics->Advanced statistics** from Booking.

Here you can calculate referral advanced statistics using the specified criteria.

The statistics contain the following data:

- New referrals: the number of referrals not booked and not included in a waiting list.
- In waiting list: the number of referrals put on waiting list.
- Waiting list entries without referral: the number of current entries on waiting list without reference to a referral, plus the number of appointments with reference to a waiting list entry, but with NO reference to a referral.
- Booked directly: this is the number of referrals booked directly without creation of a waiting list entry.
- The numerical results in the statistics are sorted and grouped first by referral reason, then by customer. This means that the statistics contain totals by reasons and subtotal by customers within each reason.
- The Calculation criteria section is used to specify parameters of the calculation. The following parameters can be specified:
  - Date range: referrals, waiting list entries and appointments within a specified date range will be included in the statistics. Empty date in the range means unlimited interval.
  - Age interval: referrals, waiting list entries and appointments for clients within the specified interval will be included in the statistics. Empty value in the range means unlimited interval.
  - **Show detailed rows:** When checked, the statistics will include detailed rows, with names and personal numbers of the clients each sub-total comprises.

When all criteria have been specified, press **Calculate**. The result is shown in the Result table below. Detailed rows are shown in black and sub-total rows are shown in blue.

Press **Print** to print the results.

It is also possible to export results into a comma-separated values (CSV) file by pressing **Export to file** button. Press the button, then select target file in the opened file selection dialog to get results exported into the selected file.

## 4 Waiting lists

*Click the button below to access our training materials.*

eLearning

Waiting lists are user-defined. To access the **Waiting List**, go to **Navigation -> Waiting List** or use **Shift+Ctrl+W**. The Waiting list can also be accessed via **Booking** and **Referral**.

## 4.1 Adding a client to a waiting list

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search or add a new client to the database using **Client information** and **New**.
- Select **Navigation -> Waiting List** or **Shift+Ctrl+W** and click **Add to list**.
- Alternatively, from the **Referral** module select **Add to list**.
- Enter **Pathway ID** – can be made mandated by your system administrator.
- Select the appropriate waiting list from the drop-down list.
- Enter **Initial wait** (shown as **Wait** time on the list.) The Initial wait is always entered as a number of weeks. This field can be filled with a predefined waiting time for this waiting list, if so configured by your system administrator.
- **Registered date** is automatically entered but can be adjusted manually.
- **Other relevant date** defaults to the current date, if so set up by your system administrator. It can also be set to either mandatory or optional.
- Add any further **Information**.
- Specify a **Reason** if required.
- There is an option to **Print letter after saving** if required.
- A **New outcome status** will default, if so designed by your system administrator.
- Any **Appointments** and the **Outcome status history** attached to this waiting list entry can be viewed on the right-hand side of the waiting list window. This can be hidden by selecting **Concise mode**.
- Click **Save**.

The screenshot shows the 'Client to waiting list' window for 'MR JOHN SMITH'. The window has a title bar with a close button (X) and a toolbar with 'Letter', 'Concise mode', 'Save', and 'Cancel' buttons. The main area is divided into several sections:

- Client Information:** PathwayID (with an 'Edit' button), Active wait, Projected wait, List (dropdown menu showing 'TGW - AUDIO ASSESSMENT +1'), Initial wait (52 weeks), Earmould (No), Registered (09/01/2020), Time on waiting list (15:22), Other relevant date (with an 'Edit' button), Information (text area), Reason (dropdown menu), and checkboxes for 'Letter printed' and 'Print letter after saving'.
- Outcome Status:** 'Current outcome status' (text area), 'New outcome status' (dropdown menu), and 'Linked referral's current outcome' (text area).
- Appointment Table:** A table with columns: Date, Time, Symbol, Status, Resource. It is currently empty.
- Outcome Status History Table:** A table with columns: Date, Outcome status, Clock. It is currently empty.
- Medical priority:** A text area at the bottom left.
- Current stage breach date:** A text area at the bottom center.

The name of the No/Yes **Optional attribute (Earmould** in above screenshot) may be changed by your system administrator.

Besides changing the value from the **Client to waiting list** window, you can also double-click on the value field in the list on the main waiting list screen.

Title	First name	Last name	Earmould	Transport	Letter	Pathway ID
MRS	FIRSTNAME2	LASTNAME2278	No			
MR	FIRSTNAME4	LASTNAME46887	No			
MISS	FIRSTNAME1	LASTNAME15057	No			
MR	FIRSTNAME2	LASTNAME294021	No	1		

### Good to know

#### How status works

An outcome status can be set on either an appointment or on a waiting list entry. When the outcome status for an appointment is set, this affects the outcome status of any waiting list entries linked to the appointment and vice versa.

If configured by your system administrator, the outcome status can be updated by the appointment status, so when the appointment status changes, so does the outcome status.

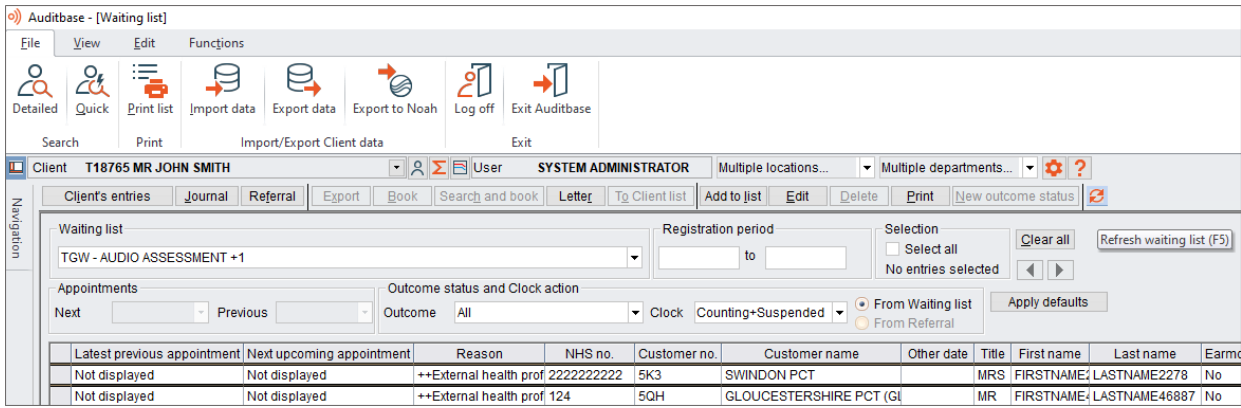
Outcomes appearing on the Booking information drop down list represent an Appointment outcome. Those selected from the New outcome status list on the referral screen represent a Referral stats. Outcomes selected from the New outcome status on a Waiting list represent a Waiting list status. Outcomes can transfer from appointment to waiting list and referrals and from waiting lists to referrals if the entries are linked and if the Outcome is configured as being applicable to these functions, i.e. if an appointment Outcome is configured as a Referral outcome but not as a Waiting list outcome, it can transfer from the appointment to the referral but not to the waiting list. Most outcomes could be required as an Appointment, Referral and Waiting list outcome status but some, e.g. referral received and referral closed, may only be required as a Referral status.

#### Clock actions and closing

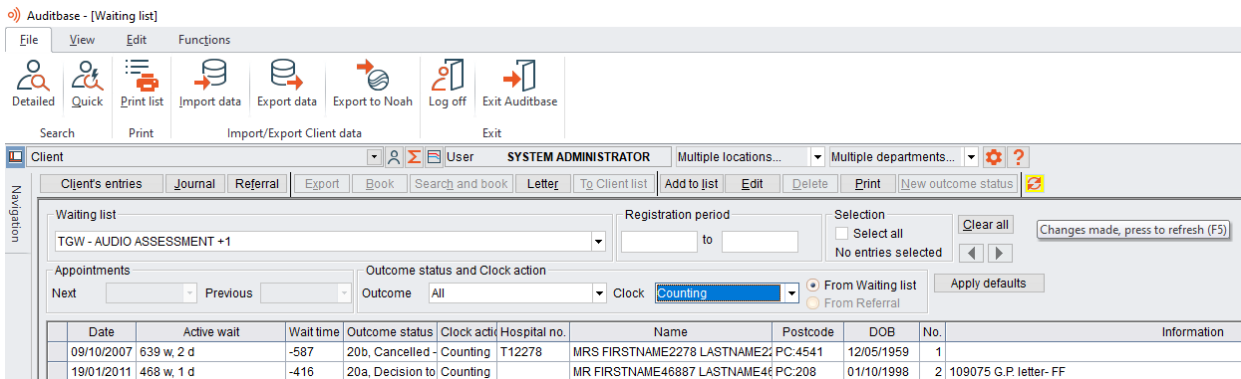
Once the outcome status is set, this effects the clock action. Set up in the system administration, different outcome statuses have different clock actions, so for instance an outcome status of “Discharged/Referred back to GP” would typically have the clock action Stopped associated with it.

If a waiting list entry has been set to Closed, it can be referred completely from the waiting list, if so set up by your system administrator.

Once a waiting list entry has been linked to an appointment, the single row in the list is automatically refreshed. You also have the option of using the **Refresh** button on the waiting list screen or press **F5**, to see any new changes made by your colleagues.



Your system administrator can set up for the whole site or you can configure in Administration for when you log in whether or not the waiting list should refresh immediately after changing filter criteria. If not, the **Refresh** button will turn yellow to indicate that changes have been made and you should refresh the waiting list.



## 4.2 Viewing and filtering Waiting lists

- Select **Navigation** -> **Waiting list**.
- Select the relevant waiting list from the drop-down list.
- You can view the individual waiting lists or select **All** to view all the waiting lists at the same time.
- When scrolling to the right, you will see a column called **Projected wait**, which shows what the wait will be when the booked appointment occurs. It only shows when the option to show Previous and Next appointments is enabled on the particular list. The appointment must be linked to the waiting list for the predicted wait to be displayed. Appointments with certain statuses chosen in System Administration are not included.
- Limit the **Registration period**, if required.
- If all entries do not fit into the table, use the **Right arrow** button to see further entries.
- You can also filter the waiting lists, if so set up by your system administrator.
- The filters have the following actions:
  - **Appointments – Next and Previous**. This filter will display those clients that have a next or previous appointment which can be **Found** or **Not found**.
  - **Outcome status**. Displays all clients with the selected **Outcome status**.
  - **Clock action**. Displays all clients with the selected **Clock action** or combination of actions.
  - **Current stage breach date**. Displays the target date for the current stage only. This does not display the target date of the stage when the client was added to the waiting list.
- If you select **From Waiting list**, data will be filtered on the outcome status and clock action from the waiting list entry; if you select **From Referral**, then data will be filtered on the outcome status and clock action from the linked referral.
- Limit the **Registration period**, if required.
- Your System Administrator can set breach warnings allowing entries to change colour dependent on how close to breach they are or if they have breached. The breach date can be calculated in days or weeks.

*NOTE: The **From Referral** option can be disabled from the Auditbase Administration tool by clearing the **Display medical priority, outcome and clock action from linked referral on the main WL screen** check box in the **Waiting list types** settings.*

- When scrolling to the right, you will see columns called **Referral outcome** and **Referral clock action**, which contain the current outcome status and clock action from the linked referral. The columns will be empty if the waiting list entry is not linked to a referral and will contain “<Not displayed>” if the **From Referral** option is disabled.
- These filters can be used singly or in combination with each other. The defaults set by your system administrator can be applied by clicking the **Apply defaults** button.
- If the current filter excludes the chosen entry under **Client’s entries**, the filter will be changed to show the entry. The new filter you see is only filtered on the date of the selected client’s entry.
- Active wait and Projected wait will be shown in weeks and days or just days depending on

- the setting in Administration.
- **Print if required.**

The screenshot displays the Auditbase software interface. At the top, there is a menu bar with options like File, View, Edit, and Functions. Below the menu is a toolbar with icons for Detailed, Quick, Print list, Import data, Export data, Export to Noah, Log off, and Exit Auditbase. The main window shows a client profile for 'T137586 MST FIRSTNAME37586 LASTNAME37586' and a 'Waiting list' section. The waiting list is a table with the following data:

Date	Active wait	Wait time	Outcome status	Clock action	Hospital no.	Name	Postcode	DOB	No.
09/10/2007	639 w, 2 d	-587	20b, Cancelled	Counting	T12278	MRS FIRSTNAME2278 LASTNAME2278	PC:4541	12/05/1959	1
19/01/2011	468 w, 1 d	-416	20a, Decision to	Counting		MR FIRSTNAME46887 LASTNAME46887	PC:208	01/10/1998	2
18/02/2015	255 w, 1 d	-203		Counting	T115057	MISS FIRSTNAME15057 LASTNAME15057	PC:6497	22/06/1998	3
18/02/2015	255 w, 1 d	-203		Counting	T129402	MR FIRSTNAME29402 FIRSTNAME: KK9 8LL		30/05/1951	4
02/11/2015	218 w, 3 d	-166		Counting	T137586	MST FIRSTNAME37586 LASTNAME37586	PC:3919	03/07/2000	5
20/11/2015	215 w, 6 d	-163		Counting	truhwet	MR OK OK	B8 3EE	06/09/1943	6
07/07/2017	130 w, 6 d	-78	20a, Decision to	Counting	T999911	Father àæø2 àæø1	111	03/04/1992	7
07/07/2017	130 w, 6 d	-78		Counting	T1105	MRS FIRSTNAME105 LASTNAME105	PC:3649	16/08/1910	8
15/06/2018	81 w, 6 d	-29	10a, Awaiting first	Counting	T144659	MR FIRSTNAME44659 LASTNAME44659	PC:7386	06/07/1947	9
15/06/2018	81 w, 6 d	-29	20a, Decision to	Counting	T1120	MRS FIRSTNAME120 LASTNAME120	PC:6082	19/08/1929	10
07/07/2018	78 w, 5 d	-26		Counting	T454569	Ms. Surnerv		01/01/2018	11

Below the table, there are fields for 'Waiting list' (TGW - AUDIOASSESSMENT +1), 'Customer name' (SWINDON PCT), 'Client phone' (99999 999999), 'Customer no.' (5K3), 'Transport', and 'Client location' (Disabled in Admin). The interface also includes a navigation pane on the left and a status bar at the bottom right showing 'NUM'.

### 4.3 Searching for a client on a waiting list

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation-> Client's entries** or press **Shift+Ctrl+Q**.
- Highlight required waiting list entry in lower table.
- Click **Show in waiting list** or double-click.
- Click **Edit** to edit the entry.
- Click **Add** to create a new entry.

Client's appointments and waiting lists
✕

Client **MST FIRSTNAME37586 LASTNAME37586**
Close

Appointments list - 17 item(s)
History of changes
Attached actions
Delete from history
Show in appt.book


Date	Time	Loc.	Dept.	Appt.	Status	Resource	Reason	SMS1	SMS2	Declined offer	Symbol
20/06/2018	10:00	4	4	P	*	Res46	++External health professional referral (eg.HV's)				GWH Audio asses
19/06/2018	17:00			M	*	Travy					ENT new patient r
18/06/2018	16:00			F	*	Charlie	++External health professional referral (eg.HV's)				from1
18/06/2018	10:00			E	*	Travy	+CIRENCESTER Treatment Centre (ISTC)				PHAC new patient
10/06/2018	13:15			I	*	Stassy	.AUDIOLOGY referral				to1
23/11/2015	10:15			Z	S	Res81	.ENT referral				2
09/11/2015	10:45			Z	*	Travy	++External health professional referral (eg.HV's)				2
05/11/2015	12:00			Z	A	Travy	++External health professional referral (eg.HV's)				2

Waiting list entries - 1 item(s)
Add
Edit
Show in waiting list

Wait time	Date	Waiting list	Information
-166	02/11	TGW - AUD	,";?N;,";?N;

Appointments where an offer has been declined will appear in a Burgundy colour on the screen, with the associated Appointment status.

## 4.4 Selecting clients' entries from waiting list

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Navigation -> Waiting list**.
- To select one client, click on the client's row. Your System Administrator can configure whether or not a warning will appear when changing a client.
- To select multiple clients, click each one in the grey column to the far left. This will turn on the check mark.
- When a client is selected, he also becomes temporarily checked  until another is selected or the check is confirmed by clicking on it.
- Multiple selections can be used for Export, PPP, Delete, and Book functions.
- When multiple clients are checked, the client highlighted in black will be the one used by the Client's entries, Journal, Referral, Add and Edit buttons.

## 4.5 Deleting client's entry from waiting list

*It is not possible to delete a waiting list which contains client entries.*

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Waiting list**.
- Select the client's entry (or entries) by clicking on it; a check mark will appear at the start of the row.
- Click **Delete**.
- Click **Yes**.
- When multiple clients are checked, the whole group will be deleted.

The screenshot displays the 'Waiting list' management interface. At the top, there is a menu bar with options like 'Client's entries', 'Journal', 'Referral', 'Export', 'Book', 'Search and book', 'Letter', 'To Client list', 'Add to list', 'Edit', 'Delete', 'Print', and 'New outcome status'. Below the menu, the 'Waiting list' section shows 'TGW - AUDIO ASSESSMENT +1' as the current list. A 'Registration period' field is empty. On the right, there are 'Selection' options: 'Select all' (unchecked), '3 entries selected' (indicated), and 'Clear all'. Below this, there are radio buttons for 'From Waiting list' (selected) and 'From Referral', along with an 'Apply defaults' button.

A confirmation dialog box is overlaid on the table, asking: 'Are you sure you want to delete selected 3 client(s) from waiting list?'. It has 'Yes' and 'No' buttons.

Date	Active wait	Wait time	Outcome	Postcode	DOB	No.	
09/10/2007	639 w, 2 d	-587	20b, C	PC:4541	12/05/1959	1	
19/01/2011	468 w, 1 d	-416	20a, D	PC:208	01/10/1998	2 109075 G.P. letter-	
✓ 18/02/2015	255 w, 1 d	-203		PC:6497	22/06/1998	3	
✓ 18/02/2015	255 w, 1 d	-203		Counting T129402	MR FIRSTNAME29402FIRSTNAME; KK9 8LL	30/05/1951	4
✓ 02/11/2015	248 w, 3 d	-166		Counting T137586	MST FIRSTNAME37586 LASTNAME37586; PC:3010	03/07/2000	5

## 4.6 Editing or moving a client's waiting list entry

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation -> Waiting list.**
- Highlight the client's entry.
- Click **Edit** or double click on the row (except in the **Optional att** column where a double-click toggles the value).

The screenshot shows the 'Edit waiting list entry' form with the following data:

**Client:** MRS FIRSTNAME120 LASTNAME120

**Appointments:**

Date	Time	Symbol	Status	Resource

**Outcome status history:**

Date	Outcome status	Clock
15/06/2018 14:47:07	91a, Active monitoring - continued	Stopped
15/06/2018 14:39:07	100a, Referral closed	Closed
15/06/2018 14:39:06	36a, Patient died before RTT treatment	Stopped
15/06/2018 14:38:16	100a, Referral closed	Closed
15/06/2018 14:38:15	36a, Patient died before RTT treatment	Stopped
15/06/2018 14:32:36	31a, Active monitoring - patient start	Stopped

**Client Information:**

PathwayID: [ ] Edit

Active wait: 0 w, 0 d Projected wait: [ ]

List: TGW - AUDIO ASSESSMENT +1

Initial wait: 52 weeks Earmould: No

Registered: 15/06/2018 Time on waiting list: 14:30

Other relevant date: 15/06/2018 Edit

Information: ssssssssss  
xxxxxxxxxx

Reason: ++GP direct referral

Letter printed  Print letter after saving

**Current outcome status:** 91a, Active monitoring - continued since 15/06/2018 14:47:07 Stopped Change

**New outcome status:** [ ]

**Linked referral's current outcome:** 33a, DNA 1st assessment since 15/06/2018 14:55:27 Nullified

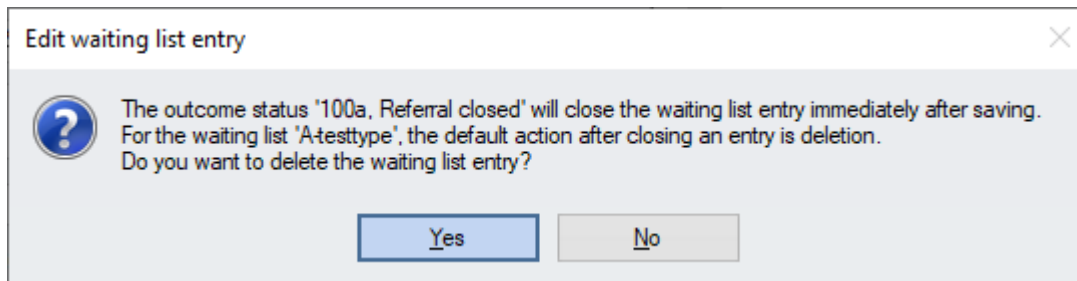
Auto assigned by: 15/06/2018, 33a, PHAC new patient mould~

Current stage breach date: [ ]

Medical priority: Normal

- The **Initial wait** (weeks) and **Registered** can be modified. If a client is entered on a waiting list with a waiting time of 0 weeks, Auditbase will calculate how long the client has been on the waiting list. It can be used to prioritize clients i.e. entering 4 weeks for urgent, 6 for soon and 8 for routine. Auditbase will then list the clients with the urgent clients at the top of the list.
- On an entry editing, the system offers possibility of either initial Waiting time editing or Waiting time rest editing. This depends on settings in the Administration tool.
- **Active wait** and **Projected wait** will be shown in weeks and days or just days depending on the setting in Administration
- Set **Optional attribute** status to **Yes** or **No**. Note that this status can also be changed in the main **Waiting list** by double-clicking on the **Optional attribute** column for a certain entry. Note also that the name of the Optional attribute is configurable by the system administrator for all lists or for a specific list, so it may have another name in your system.

- Free text can be entered in the **Information** box.
- **Reason** can be selected from a drop-down list.
- Depending on the settings in the system administration, a waiting list entry can be deleted automatically, if the **New outcome status** is set to Closed. In the system administration, you can also choose to show a warning before the entry is deleted, in which you can overrule the setting and not delete the entry.

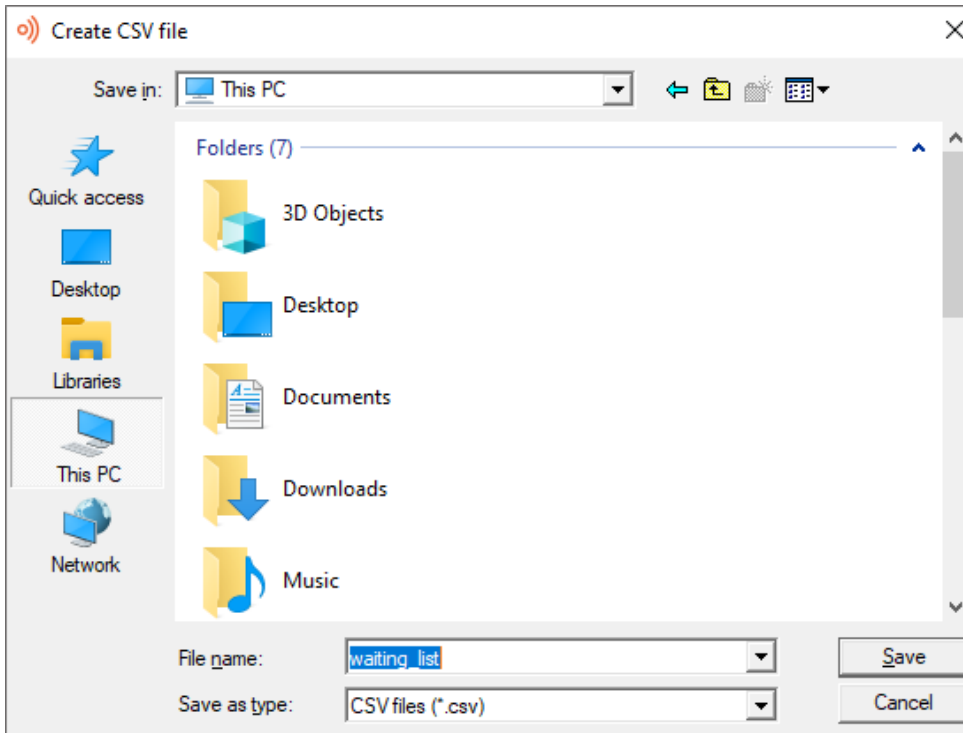


- When you click **Save**, the dialog will close.

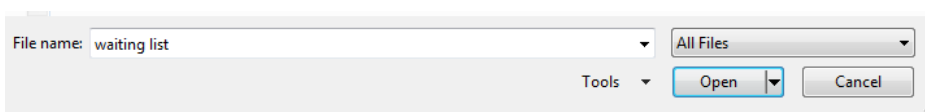
This procedure can be used to move a client from one waiting list to another.

## 4.7 Exporting waiting lists to Comma Separated Values (CSV)

- **Navigation** -> **Waiting list**.
- Select a **Waiting list** from the drop-down menu.
- **Functions** -> **Export CSV**
- A window will open called **Create CSV file**.



- Give the CSV file a **File name** and choose where to save the file.
- Select **Save** to store the file in the selected location. This file will have a .csv extension.
- The CSV file that is created will contain all the data for the selected waiting list, no matter what filters have been applied to that waiting list.
- To open the CSV file using Microsoft Excel, start Excel and use one of the Open dialogues.
- You will need to change **All Excel files** to **All Files** in order to find the .csv file.



- The file will now open in Excel and can be adjusted as required.

## 5 Client lists/Trials

Click the button below to access our training materials.



Lists of clients can be created to be used for research or clinical trials, the name is configurable as **Client lists** or **Trials** by your System Administrator. To access **Client lists/Trials** select **Navigation-> Client lists/Trials** or press **Ctrl+Shift+L**.

The **Lists** tab will display all lists and these can be filtered by checking the relevant **Status** box to **Show planned**, **Show active**, **Show closed** and **Show only assigned to me**.

Highlighting a list and then selecting the **Members** tab will display all the clients that have been assigned to that list.

Lists		Members					
<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>							
<b>Status</b> <input checked="" type="checkbox"/> Show planned <input checked="" type="checkbox"/> Show active <input type="checkbox"/> Show closed <input type="checkbox"/> Show only assigned to me							
Start date	End date	Status	Title	Responsible	Type	Min. clients	Act. clients
01/01/2016	01/02/2017	Active	Title 4	USER NAME29.		444	9
09/01/2020	09/01/2021	Planned	Test list	SYSTEM ADMINISTRATOR			0

## 5.1 Creating new Client lists/Trials

- To create a new **Client lists/Trials**, select the **New** button. A **Create Client list** window opens and the **Title** for the new list can be added.
- A **Start date** and **End date** for the list can be added; a double click will insert the current date while a right click will open the calendar.
- A minimum number of clients for the list can be added to the **Min. clients** field. The actual number of clients field called **Act. Clients** will be inactive.
- Your System Administrator can set up the **Type** of list which can be selected from the drop-down menu.
- The person **Responsible** for this list can be selected from the drop-down menu of users.
- The Status of the list can be selected from the pre-defined drop-down menu. The options are **Planned, Active** and **Closed**.
- A **Comment** can be added to explain the list.
- Select **Save** or **Cancel** to return to lists without creating a new one.

- The new list will now appear in Auditbase.

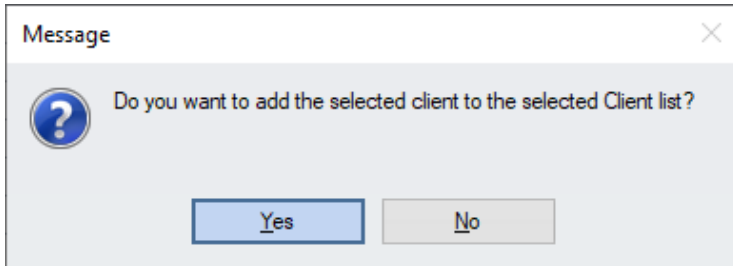
Start date	End date	Status	Title	Responsible	Type	Min. clients	Act. clients
09/01/2020	09/01/2021	Planned	Profound loss	SYSTEM ADMINISTRATOR		20	0

## 5.2 Editing Client lists/Trials

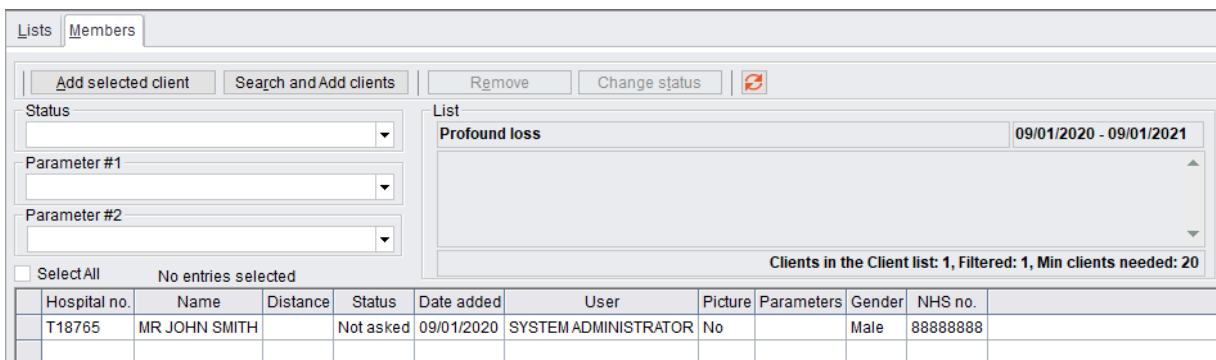
- To edit a **Client list/Trials**, highlight the required list and select **Edit**. All options are then available to edit as required.

### 5.3 Adding clients to Client lists/Trials

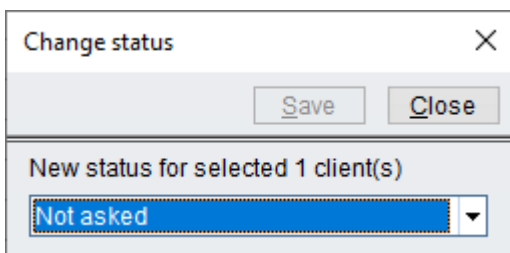
- Clients can be added to a list using the F3 search function.
- Clients can also be added to a list by highlighting the list and selecting the **Members** tab.
- To add the active client to the list, select the **Add selected client** button.
- A confirmation window will appear, select **Yes** to add the client or **No** to go back to **Members**.




- The client will now appear on the list with the default status set by your System Administrator.



- **Search and Add clients** will open the F3 search window and clients can be searched for using the advanced criteria and added to a list.
- If client(s) are in a list already with intersecting dates or are deceased, the system will warn and give the option to exclude these from the new list.
- If you need to remove a client from a list, highlight the client and select **Remove**.
- The **Status** of a client on a list can be changed by highlighting the client and selecting **Change status** or by clicking into the **Status** field directly on the table. A new status from the drop-down list can be selected. This drop-down list is defined by your System Administrator.



- The list can be refreshed by selecting the  button.
- A list can be filtered by selecting from the drop-down menus labelled **Status**, **Parameter #1** and **Parameter #2**.
- If a filter is applied, this is shown in the **List** information.

Clients in the Client list: 9, Filtered: 3, Min clients needed: 444

## 6 Booking

*Click the button below to access our training materials.*

eLearning

Go to **Navigation** -> **Booking** to open the booking module.

In this module, you can find and access all information that has been saved in the database for the client you are working with. The Booking module handles client appointments, including group appointments, and reservations.

Information can be represented by either the **Resource plan** or the **Time plan**. Appointments of various kinds may be registered here.

An appointment can be booked either by searching for the next available timeslot or by double clicking and thereby booking directly. The client must be selected before an appointment can be booked. However, group appointments can be made without selecting a client.

Appointments can be booked from a number of dialogs in Auditbase, for instance from **Referral** or **Waiting list**.

To edit an appointment or reservation, double-click it and modify as required.

Read more in the following chapters.

## 6.1 Booking list

Go to **Functions** -> **Booking list** to display a list of the day's appointments for the selected resource.

These appointments can be filtered as required by resource or time and sorted by time or hospital number.

The list specifies time, client or activity and resource, sorted in time order and then in resource order.

Booking list
✕

Date: 
 Show client/group appointments
 Show reservations
 AM only
 PM only

Sort by time
 Sort by Hospital no.
Resource:

Time	NHS no.	Hospital no.	Appointment name	Resource	Appointr
08:00-08:15	88888888	T18765	MR JOHN SMITH	Charlie	1
08:00-08:15		T1110	MRS FIRSTNAME110 LASTNAME110	Res46	1
08:00-08:15		T888813	nlu	Stassy	2
08:15-08:30	88888888	T18765	MR JOHN SMITH	Res46	2
09:00-09:15	88888888	T18765	MR JOHN SMITH	Res46	1
13:00-14:30		T123026	MR FIRSTNAME23026 LASTNAME23026	Charlie	1

<
>

General note

Daily note

Click **Print** to print list. When printing the list the phone numbers of the patient, available from the client information module, will be demonstrated under the patient appointment.

### Booking list

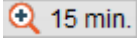
Selected date: 09/01/2020

Client appointments
  Reservations
  AM only
  PM only

Belonging to: All

Time	Hospital no.	NHS no.	Name	Resource	Appointment	Information
08:00-08:15	T18765 Tel: 99999 999999	88888888	MR JOHN SMITH Work:	Charlie	1 Mob :	
08:00-08:15	T1110 Tel: 99999 999999		MRS FIRSTNAME110 LAST Work:	Res46	1 Mob : +1232323	
08:00-08:15	T888813 Tel:		nlu Work:	Stassy	2 Mob :	
08:15-08:30	T18765 Tel: 99999 999999	88888888	MR JOHN SMITH Work:	Res46	2 Mob :	
09:00-09:15	T18765 Tel: 99999 999999	88888888	MR JOHN SMITH Work:	Res46	1 Mob :	
13:00-14:30	T123026 Tel: 99999 999999		MR FIRSTNAME23026 LAS Work:	Charlie	1 Mob :	

## 6.2 Resource plan

- Select **View -> Resource plan** to view the Resource plan.
- The date is shown at the top of the screen.
- Times are located on the left of the screen in timeslots. The start and end time can be modified by the System Administrator to suit the requirements of the department.
- The System Administer can migrate Auditbase from the default 15-minute appointment units to using 5-minute appointment units permanently. Generally, the 5-minute unit setting has slower performance than the 15-minute unit setting because three times as much information is being transferred, processed and displayed. If migrated users have both **zoom** and **scale** options for changing the view, while using 15-minute units users have only the **zoom** option.
- The **scale** options are 5, 10, 15, 20, or 30-minute slots altering the units displayed on the left-hand time column. It is possible to change the scale view by using the  button or the following shortcuts which are displayed when the button is selected. **Ctrl+K** to **Scale up** and **Ctrl+L** to **Scale down**.

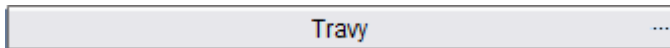
Zoom in	Ctrl+I
Zoom out	Ctrl+O
<input checked="" type="checkbox"/> 100%	
125%	
150%	
200%	
Scale up	Ctrl+K
Scale down	Ctrl+L
5 Minutes	
10 Minutes	
<input checked="" type="checkbox"/> 15 Minutes	
20 Minutes	
30 Minutes	

Using **zoom** the size of the booking area can be increased by the selected percentage. This size can be adjusted using the **Zoom in** and **Zoom out** options which have the keyboard shortcuts of **Ctrl+I** and **Ctrl+O** respectively. These same options are available from **Selected zoom** on the **View** ribbon at the top of the page. The **zoom** and **scale** selections are remembered if a user logs off from Auditbase.

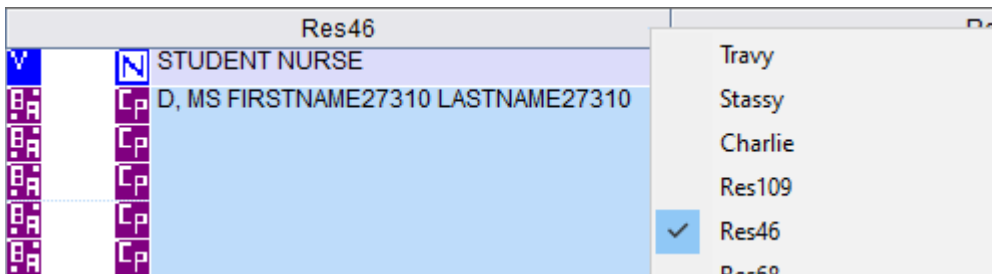
Time	CHARLIE	Trev	BERTA	JUDITH	ALAN	JAKE
08:00	WA	KA MISS. TESTINA	KA DR. ALAN HARPER	WA MR. JAMES SCOTT	WA MR. JAMES SCOTT	BF WA FATHER DERF FRED
08:15	WA	KA TESTER	KA	WA	WA	BF WA
08:30	WA	KA	KA	WA	WA	BF WA
08:45	WA	KA	KA	WA	WA	BF WA
09:00	WA	KA	KA	WA	WA	BF WA
09:15	WA	KA	KA MISS. BETSY HARPER	WA	WA	BF WA
09:30	WA	KA	KA	WA	WA	BF WA
09:45	WA	KA	KA	WA	WA	BF WA
10:00	WA	KA	KA	WA	WA	BF WA
10:15	WA	KA	KA MRS. EVELYN HARPER	WA	WA	BF WA
10:30	WA	KA	KA	WA	WA	BF WA
10:45	WA	KA	KA	WA	WA	BF WA
11:00	WA	KA	KA	WA	WA	BF WA
11:15	WA	KA	KA MISS. MARIN HINKLE	WA	WA	BF WA
11:30	WA	KA	KA	WA	WA	BF WA
11:45	WA	KA	KA	WA	WA	BF WA
12:00	WA	KA	KA	WA	WA	BF WA
12:15	WA	KA	KA	WA	WA	BF WA
12:30	WA	KA	KA	WA	WA	BF WA
12:45	WA	KA	KA	WA	WA	BF WA
13:00	WA	KA	KA	WA	WA	BF WA
13:15	WA	KA	KA	WA DR. HERB MELNICK	WA DR. HERB MELNICK	BF WA
13:30	WA	KA	KA	WA	WA	BF WA
13:45	WA	KA	KA	WA	WA	BF WA
14:00	WA	KA	KA	WA	WA	BF WA
14:15	WA	KA	KA	WA	WA	BF WA
14:30	WA	KA	KA	WA	WA	BF WA
14:45	WA	KA	KA	WA	WA	BF WA
15:00	WA	KA	KA	WA	WA	BF WA
15:15	WA	KA	KA	WA	WA	BF WA
15:30	WA	KA	KA DR. CHRIS LYER	WA	WA	BF WA
15:45	WA	KA	KA	WA	WA	BF WA
16:00	WA	KA	KA	WA	WA	BF WA
16:15	WA	KA	KA	WA	WA	BF WA
16:30	WA	KA	KA	WA	WA	BF WA
16:45	WA	KA	KA	WA	WA	BF WA
17:00	WA	KA	KA	WA	WA	BF WA
17:15	WA	KA	KA	WA	WA	BF WA
17:30	WA	KA	KA	WA	WA	BF WA
17:45	WA	KA	KA	WA	WA	BF WA

Time	CHARLIE	Trev	BERTA	JUDITH	ALAN	JAKE
08:00	BA WA	KA MISS. TESTINA	KA DR. ALAN HARPER	WA MR. JAMES SCOTT	WA MR. JAMES SCOTT	BF WA FATHER DERF FRED
08:15	BA WA	KA TESTER	KA	WA	WA	BF WA
08:30	BA WA	KA	KA	WA	WA	BF WA
08:45	BA WA	KA	KA	WA	WA	BF WA
09:00	BA WA	KA	KA	WA	WA	BF WA
09:15	BA WA	KA	KA MISS. BETSY HARPER	WA	WA	BF WA
09:30	BA WA	KA	KA	WA	WA	BF WA
09:45	BA WA	KA	KA	WA	WA	BF WA
10:00	BA WA	KA	KA	WA	WA	BF WA
10:15	BA WA	KA	KA MRS. EVELYN HARPER	WA	WA	BF WA
10:30	BA WA	KA	KA	WA	WA	BF WA
10:45	BA WA	KA	KA	WA	WA	BF WA
11:00	BA WA	KA	KA	WA	WA	BF WA
11:15	BA WA	KA	KA MISS. MARIN HINKLE	WA	WA	BF WA
11:30	BA WA	KA	KA	WA	WA	BF WA
11:45	BA WA	KA	KA	WA	WA	BF WA
12:00	BA WA	KA	KA	WA	WA	BF WA
12:15	BA WA	KA	KA	WA	WA	BF WA
12:30	BA WA	KA	KA	WA	WA	BF WA
12:45	BA WA	KA	KA	WA	WA	BF WA
13:00	BA WA	KA	KA	WA	WA	BF WA
13:15	BA WA	KA	KA	WA DR. HERB MELNICK	WA DR. HERB MELNICK	BF WA
13:30	BA WA	KA	KA	WA	WA	BF WA
13:45	BA WA	KA	KA	WA	WA	BF WA
14:00	BA WA	KA	KA	WA	WA	BF WA
14:15	BA WA	KA	KA	WA	WA	BF WA

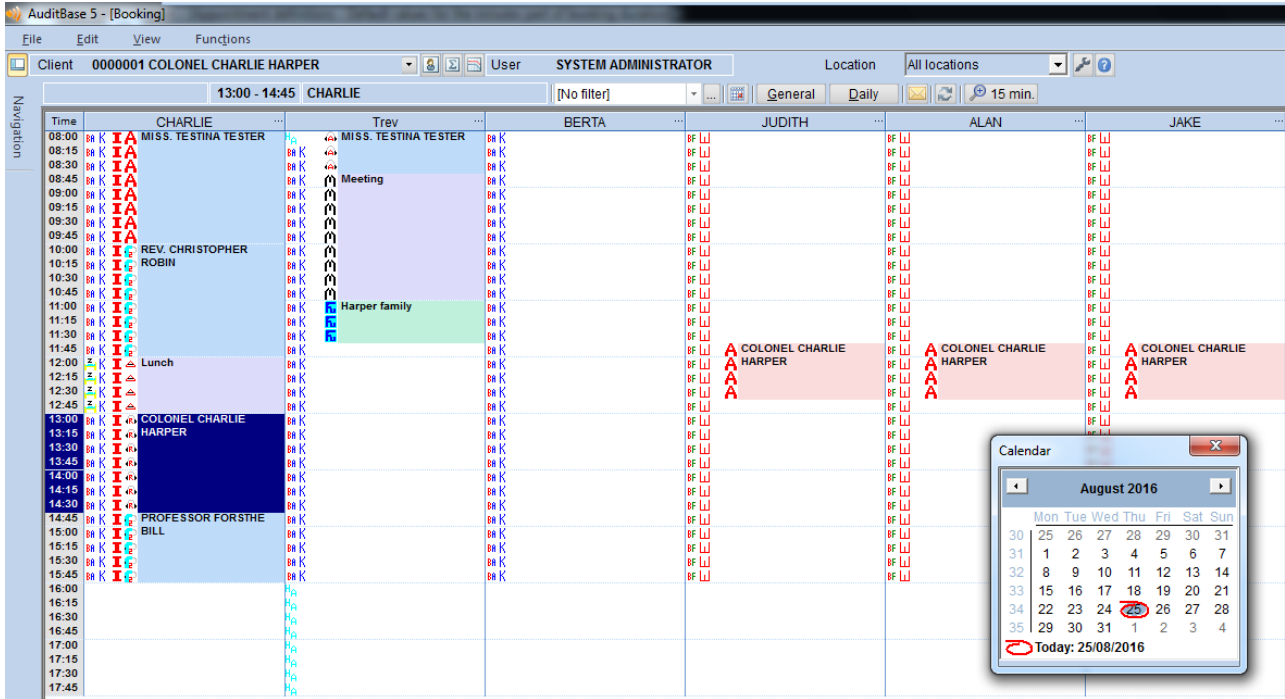
- When highlighting a slot in the table (the field is marked in dark blue), the whole of the corresponding timeslot will be highlighted to the left for a clear overview.
- Resource names are located from left to right near the top of the screen. Each resource column has a drop-down list of the resources in the system.
- Three dots at the end of the resource name allows you to choose the resources.



- Clicking on a resource will display them in the column.



- If another resource is selected from the list, the current resource will swap places with the selected resource. It is not possible to have the same resource on screen more than once.
- You can add or remove Resources from the view by going to the **Settings** ribbon and selecting **Resource setup**.
- Timeslots on a resource column can be empty or filled with either timetable or appointment symbols if there is an entry for a specific time.
- On the **Resource view** between the **Timetable** and **Appointment** symbols, two new symbols for Location and Department can be seen if they are enabled by the System Administrator.
- The full length of client appointments will appear as a light blue colour covering the duration of the appointment. Reservations are shown as mauve with group appointments showing as green. Multi-resource appointments are shown in peach colour.
- These colours can be suppressed by the system administrator for the whole site or by a user in their user specific options.
- Text in booked appointments will be in black except for Video Appointments which use blue text to distinguish them. When the selected appointment is a Video appointment the text will be in yellow rather than white.
- Placing the mouse cursor over an appointment, a tool tip will show the length of the appointment and the client's name.



- If an appointment's client name cannot be displayed in full, three dots will be shown indicating that an appointment is present.

Time	Travy
08:00	K, 2 - 1 PAED
08:15	
08:30	
08:45	
09:00	
09:15	
09:30	
09:45	
10:00	*****
10:15	C, MRS FIRSTNAME26786888888888888888 LASTNA...
10:30	C, MR FIRSTNAME13050 LASTNAME13050
10:45	C, MRS FIRSTNAME24246 LASTNAME24246
11:00	C, MR FIRSTNAME2787 LASTNAME2787
11:15	
11:30	C, MR FIRSTNAME25461 LASTNAME25461
11:45	C, MR FIRSTNAME10504 LASTNAME10504
12:00	C, MR FIRSTNAME20268 LASTNAME20268
12:15	C, MST FIRSTNAME27705 LASTNAME27705
12:30	.....
12:45	
13:00	

- Placing the mouse cursor over the highlighted appointment will display a tool tip of the appointment time/duration and the client's name.

### 6.2.1 Resource set up

- The user can set up a personal view of resources in the appointment book.
- To activate the setup, select **Functions -> Settings -> Resource setup** from the **Booking** module.

- Defined and active resources are shown in this window and can be checked to be listed in the columns of the appointment book.
- When checked as **Show**, a column will hold the resource's name.
- When checked as **List**, the resource's name will be visible from the drop-down menu in the columns.
- When checked as **Book**, the resource's name will appear in the resource list when booking appointments.
- Click on the **Up and Down** arrow buttons to define the resource's position in lists.
- Click **Save** to store a new or changed resource set-up in the database. The changes will take effect as soon as **Save** is selected.
- **Reset to default resource view** will load the defaults and the list can be adjusted to one of the users if necessary.

Resource setup
✕

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User

SYSTEM ADMINISTRATOR

▲ ▼

Show	List	Book	Resource	Location(s)	Department(s)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Travy	Location1	Department1
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Stassy	Location2	Department2
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charlie		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res109		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res46		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res68		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res70		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res54		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res78		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res73		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res82		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res75		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res71		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res72		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res105		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res63		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res95		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Res106		

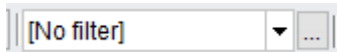
Showing Resources will be overruled by Location, Department and Clinic filtering. Grey row color indicates resource is filtered out

### 6.2.2 Clinic filters set up

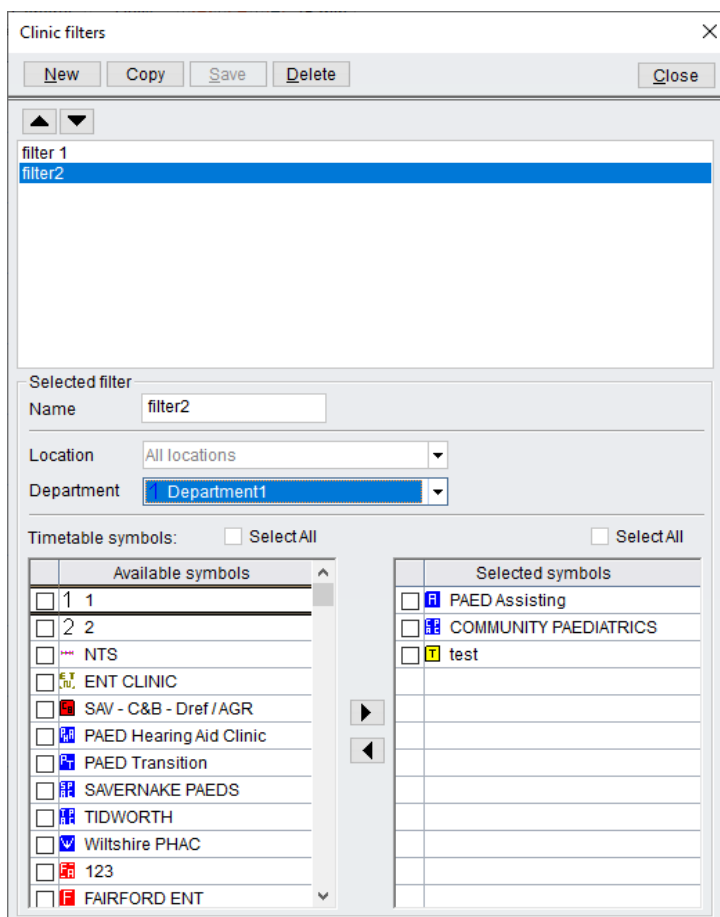
Resources on the Booking screen can be filtered by timetable symbol and/or location and/or department to show specific clinics or groups of resources working on the same clinic. These

filters do not override any restriction to resources based on location.

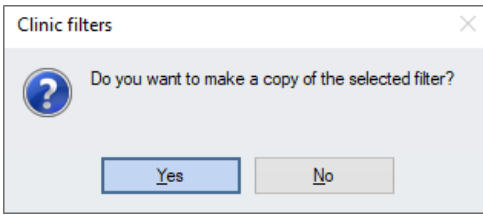
To set up filters, the extended user right **Booking: Setup clinic filters** is required. Your System Administrator can provide this extended right. Once the filter has been set up, it will be available to all users. Setup clinic filters is to the right of the filter drop down menu.



- Select **New** and enter a **Name** for the **Selected filter**.
- If **Location** or **Department** is required, select these from the drop-down menus.
- If **Multiple locations** or **Multiple departments** are required, a new window will open where the Locations/Departments can be selected.
- **Timetable symbols** can be selected by checking the box next to their name or you can **Select All**. Move the symbol selection to the right-hand box by using the arrow. Symbols can be de-selected from the filter by checking the box and moving the symbol back to the left using the arrow.



- A filter can be copied by selecting a current filter and choosing the **Copy** button.
- You will be asked if you wish to make a copy of the current filter.



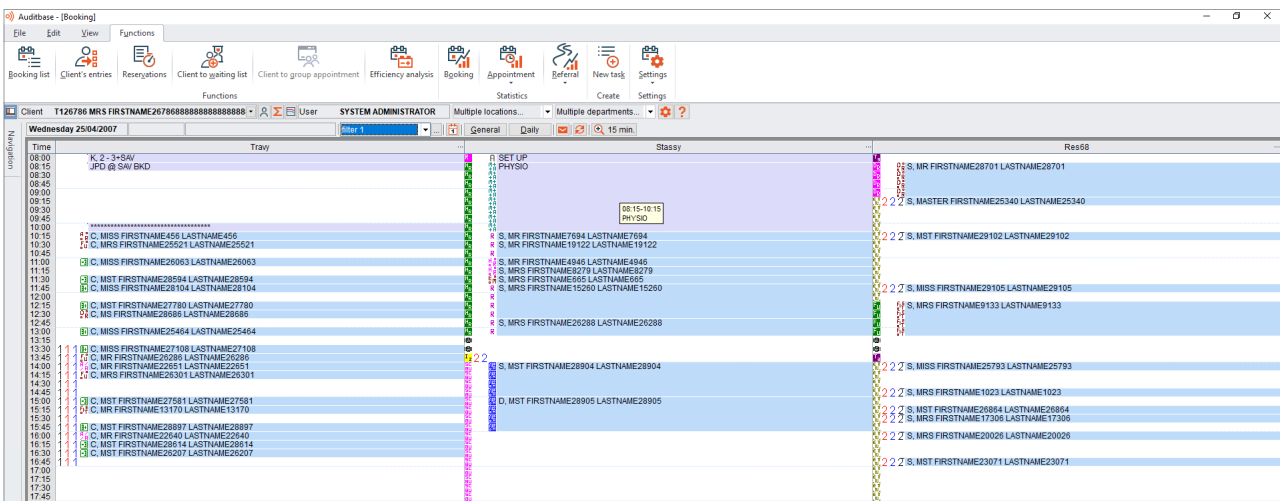
- Select **Yes**.
- The name of the filter will then have – **Copy** after its name. You can modify and rename the filter then **Save** to create a new filter.
- If a filter is no longer required, highlight the filter then **Delete** to remove it.
- To exit the filter setup, select **Close**.
- These will now be available to all users.

### 6.2.3 Using Clinic filters

Clinic filters allow the use of filters that just show resources who have certain **timetable symbols**, **locations** or **departments** for that day. For example, a filter set up to show ENT clinics will only show resources that are timetabled with the various ENT symbols.

These filters do not override any restriction to resources based on location.

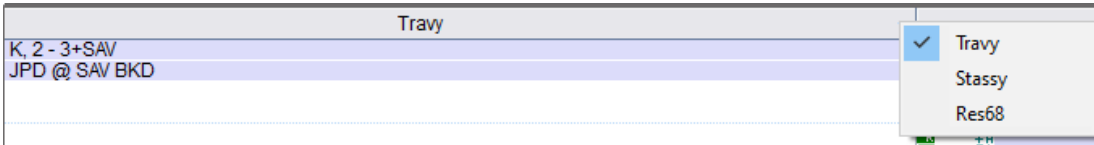
- Select the filter from the drop-down list of filters.
- The Booking screen will change to reflect the filter selection.



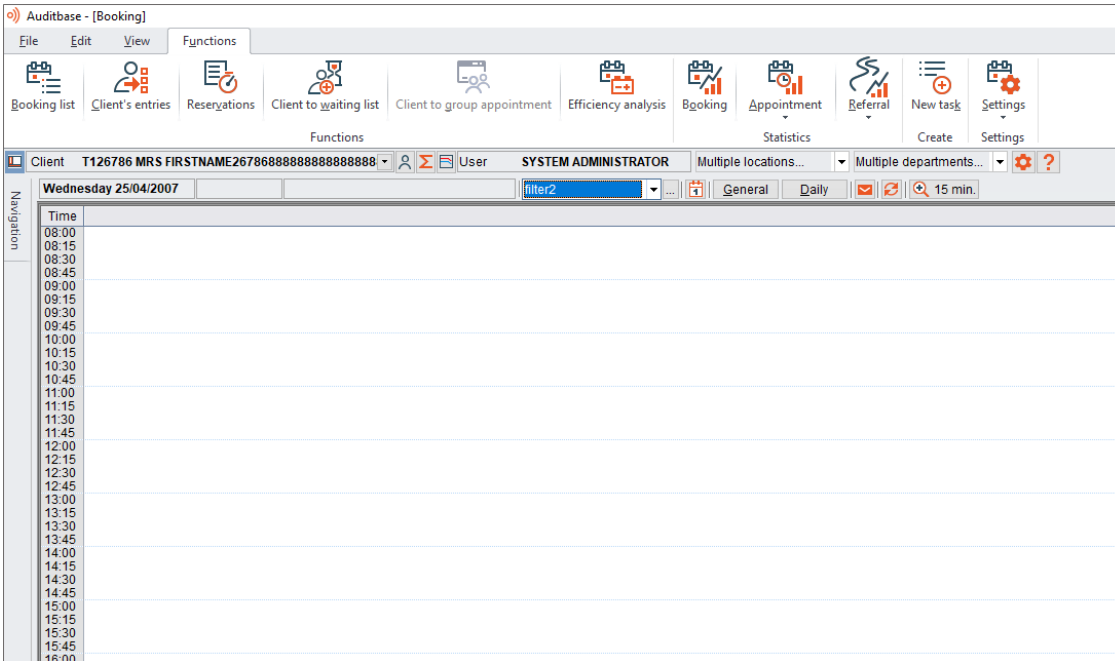
- Three dots at the end of the resource name allows you to choose the filtered resources.

Travy

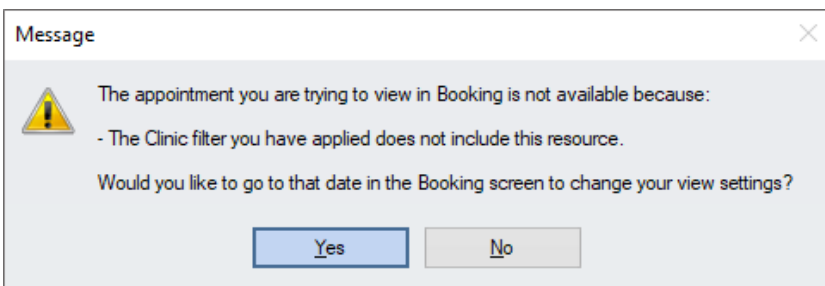
- Clicking on a resource will display them in the column.



- If no resources are contained within the filter, Auditbase displays a blank resource plan.
- You must either choose a different date or filter to display resources.



- If you try and view a **Client's entries** when the appointment does not display due to a filter, you will receive an information message.





- You will need to select **Yes** to go to the appropriate date and then change the filter settings. No will take you back to **Client's entries**.

### 6.3 Time plan general

- Select **View** and click on either **Large booking view**, **Standard view**, or **Large grid view** to choose the preferred view

- The different views can also be chosen by using the toolbar buttons on the top right:

 Standard view (displaying both the booking view and the grid view). Keyboard shortcut Shift+F7 can be used for fast access.

 Large grid view (displaying a larger grid view with a smaller booking view). Keyboard shortcut F7 can be used for fast access.



Large booking view (displaying one large booking view). Keyboard shortcut Ctrl+F7 can be used for fast access.

To adjust the size of the bottom half of the screen, the user should hover over the split line and drag to resize the screen. The timeplan will remember the size that it has been edited to if the screen is restored down and returned to full size.

*Contact your System Administrator to set which view Auditbase defaults to when opening the Time plan view.*

- The different columns in Time plan can be moved, so you can decide in which order the columns should appear.
- Let your mouse hover over the bottom line of the column header and the mouse cursor changes symbol .
- Now click and drag the column to the relevant location.
- The time span will reflect the hours selected in **System Administration -> Workstation settings**.
- The System Administrator can migrate Auditbase from the default 15-minute appointment units to using 5-minute appointment units permanently. Generally, the 5-minute unit setting has slower performance than the 15-minute unit setting because three times as much information is being transferred, processed and displayed. If migrated users have both **zoom** and **scale** options for changing the view, while using 15-minute units users, have only the zoom option.
- The **scale** options are 5, 10, 15, 20, or 30-minute slots altering the units displayed on the left-hand time column. It is possible to change the scale view by using the button or the following shortcuts which are displayed when the button is selected. **Ctrl+K** to **Scale up** and **Ctrl+L** to Scale down.
- Text in booked appointments will be in black except for Video Appointments which use blue text to distinguish them. When the selected appointment is a Video appointment the text will be in yellow rather than white.

Zoom in	Ctrl+I
Zoom out	Ctrl+O
<input checked="" type="checkbox"/> 100%	
<input type="checkbox"/> 125%	
<input type="checkbox"/> 150%	
<input type="checkbox"/> 200%	
Scale up	Ctrl+K
Scale down	Ctrl+L
<input type="checkbox"/> 5 Minutes	
<input type="checkbox"/> 10 Minutes	
<input checked="" type="checkbox"/> 15 Minutes	
<input type="checkbox"/> 20 Minutes	
<input type="checkbox"/> 30 Minutes	

Using **zoom** the size of the lower Resource area can be increased by the selected percentage. This size can be adjusted using the **Zoom in** and **Zoom out** options which have the keyboard shortcuts of **Ctrl+I** and **Ctrl+O** respectively. These same options are available from **Selected zoom** on the **View** ribbon at the top of the page. The **zoom** and **scale** selections are remembered if a user logs off from Auditbase.

If a scale is set that prevents individual appointments from being displayed, the time band that is affected is shown as grey and **<Multiple content>** is displayed if there is more than one appointment and **<Partial content>** if just one. Moving the mouse cursor over the multiple content will display a tool tip showing the appointment times and the associated client. Changing the scale will show the full information for the appointment.

Time	Location	Department	Hospital no.	NHS no.	Name	L	V	S
08:00	All	All			<Multiple content>			
:20	All	All			-- II --			
:40	All	All						
09:00	All	All						
:20	All	All						
:40	All	All						
10:00	All	All			<Multiple content>			
:20	All	All			<Multiple content>			
:40	All	All			-- II --			
11:00	All	All	T126063		MISS FIRSTNAME26063 LASTNAME26063	X		C
:20	All	All	T128594		MST FIRSTNAME28594 LASTNAME28594	X		C
:40	All	All			<Multiple content>			

A scale that does not allow the start or end time of an appointment to be displayed will have the start and end times highlighted in grey. The tool tip will display the full appointment times. Changing the scale will display the full information for the appointment.

Time	Location	Department	Hospital no.	NHS no.	Name	L	V	S
:45	All	All						
12:00	All	All						
:15	All	All						
:30	All	All	T113559		MRS FIRSTNAME13559 LASTNAME13559	X		C
:45	All	All	T15790		MRS FIRSTNAME5790 LASTNAME5790	X		C
13:00	All	All	T11124		MR FIRSTNAME1124 LASTNAME1124	X		C
:15	All	All						
:30	↑ Location1	↑ Department1	T18765	88888888	MR JOHN SMITH			*
:45	↑ Location1	↑ Department1			-- II --			
14:00	↑ Location1	↑ Department1			-- II --			
:15	↑ Location1	↑ Department1			-- II --			
:30	↑ Location1	↑ Department1						

If a 15-minute appointment cannot be displayed fully in the resource area due to the selected scale, a half symbol is displayed showing that the full appointment cannot be shown. Moving the mouse cursor over the symbol will display a tool tip giving details of the appointment and the client.

- Choose which symbols you would like to view in the Time plan by checking the box next to either **TimeTable** or **Booking**. Both sets of symbols can be seen by checking both boxes.

Booking or Timetable

TimeTable

Booking

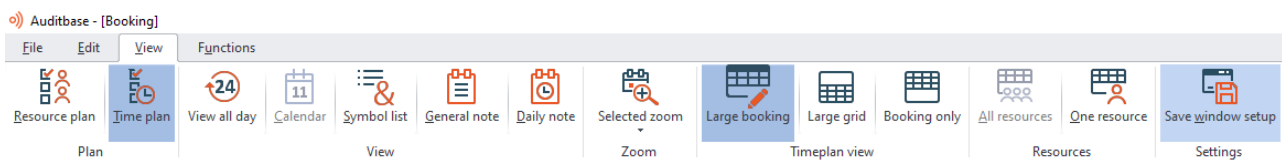
Show in separate rows

- Resources are shown to the right of the calendar. Symbols for these resources can be seen in separate rows by selecting **Show in separate rows**. This will show four rows of symbols with **Timetable** at the top, then **Location**, then **Department**, with **Booking** symbol at the bottom. This order is described by a tool tip that can be seen by placing the mouse cursor over the **Show in separate rows** label.

Resource	08	09	10	11	12	13	14	15	16	17	
Res46	[Complex grid of symbols for Res46]										
Res68	[Complex grid of symbols for Res68]										
Res70	[Complex grid of symbols for Res70]										
Res54	[Complex grid of symbols for Res54]										

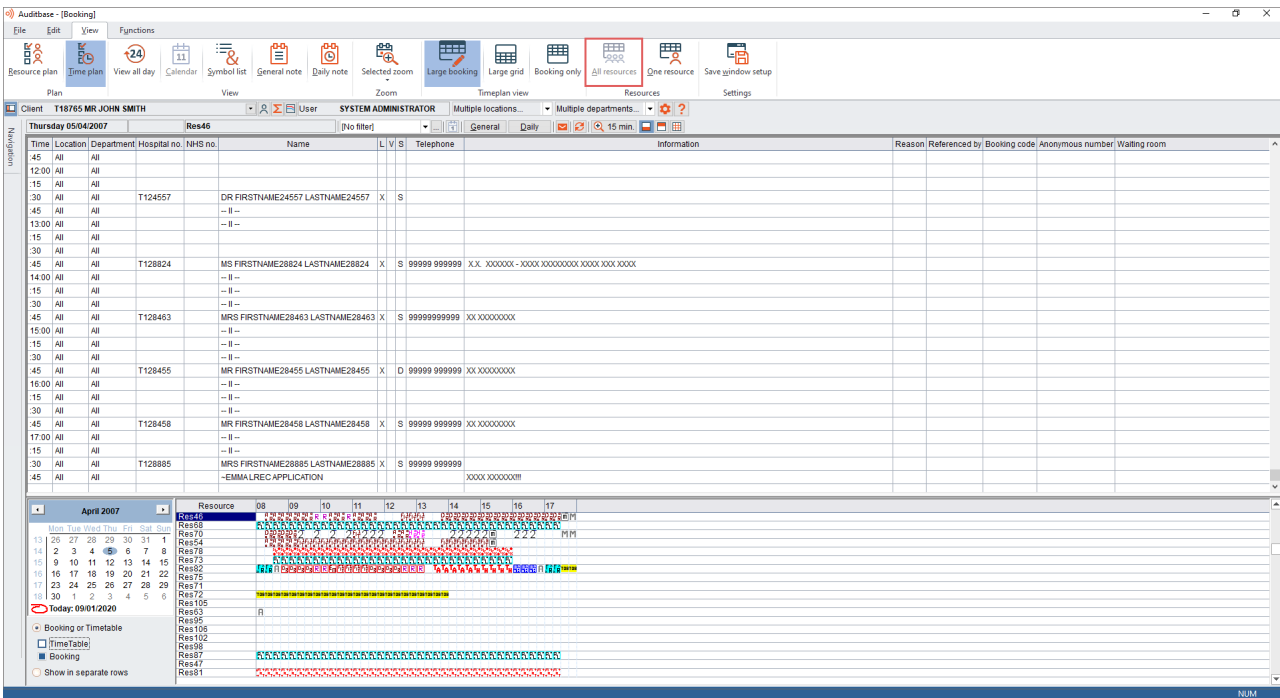
Contact your System Administrator to set which symbols to view as a default in the Time plan.

- To save the user configurations you have made, click on the menu **View -> Save window setup** and your specific settings for the Time plan view as well as the symbols view will be saved.

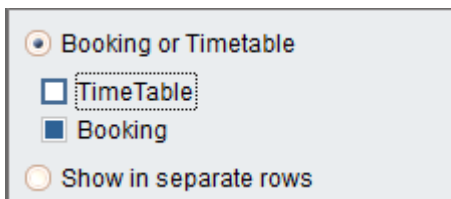


## 6.4 Time plan, All resources

- Select **View -> Time plan**.
- Select **View -> All resources**. For fast access, use **Ctrl+8** or double-click on a **date**.
- You can switch between the **One resource** and **All resources** views in three ways:
  - using the View ribbon menu item
  - using F8 or Ctrl+F8
  - clicking on either a date or a Resource
- The day is shown at the top of the screen. Resource names are listed to the right in the lower section of the screen.
- Time intervals for a selected resource are shown in the upper section of the screen. The start and end time can be modified by the System Administrator according to the demands of a department. The content of the table represents the appointments for the resource
- The grid in the lower section represents timeslots with either timetable or appointment symbols where a timetable or appointment has been created for a resource.



- Choose which symbols you would like to view in the Time plan by checking the box next to either TimeTable or Booking. Both sets of symbols can be seen by checking both boxes.



- Resources are shown to the right of the calendar. Symbols for these resources can be seen in separate rows by selecting **Show in separate rows**. This will show four rows of symbols with **Timetable** at the top, then **Location**, then **Department**, with **Booking** symbol at the bottom.

>

Resource	08	09	10	11	12	13	14	15	16	17	
Res46	[Complex grid of symbols for Res46]										
Res68	[Complex grid of symbols for Res68]										
Res70	[Complex grid of symbols for Res70]										
Res54	[Complex grid of symbols for Res54]										

Unlike the Resource view where you can alter the number of Resources shown and the width of each column changes, the height of each Resource in Time plan is fixed. The system shows a maximum number according to the screen resolution and the view option selected. With Time plan there are two view options showing either 20 or 35 Resources when using the recommended screen resolution. Your System Administrator can reduce this number, or you can adjust the screen resolution to make Auditbase smaller, but you cannot increase it. If you use a larger screen resolution, the number of Resources will not increase, the diary at the top will expand.

The System Administrator has three options:

- To have faster visible performance when changing dates and slower when scrolling through resources.
- To have a faster refresh when scrolling resources and slower when changing dates.
- To have a faster refresh when scrolling resources and faster when changing dates.

## 6.5 Time plan, One resource

- Select **View -> Time plan**.
- Select **View -> One resource**. For fast access, use **Ctrl+8** or double-click on a **date**.
- You can switch between the **One resource** and **All resources** views in three ways:
  - using the View ribbon menu item
  - using F8 or Ctrl+F8
  - clicking on either a date or a Resource
- The resource name is shown in the toolbar at the top of the window. The dates are listed to the right.
- Time intervals for a selected resource and date are located in the upper section of the screen. The start and end time can be modified by the System Administrator depending on the demands of a department. The content of the table represents the appointments for the resource.

The screenshot shows the Auditbase software interface. At the top, there is a ribbon menu with 'File', 'Edit', 'View', and 'Functions' tabs. The 'View' tab is active, showing a toolbar with icons for 'Resource plan', 'Time plan', 'View all day', 'Calendar', 'Symbol list', 'General note', 'Daily note', 'Selected zoom', 'Large booking', 'Large grid', 'Booking only', 'All resources', 'One resource', and 'Save window setup'. The 'One resource' icon is highlighted with a red box. Below the ribbon, there is a client information bar showing 'Client: T18765 MR JOHN SMITH' and 'User: SYSTEM ADMINISTRATOR'. The main area is a table with columns: Time, Location, Department, Hospital no., NHS no., Name, L, V, S, Telephone, and Information. The table shows appointment data for 'Res46' on 'Thursday 05/04/2007'. The 'Name' column contains placeholder text like 'DR FIRSTNAME24557 LASTNAME24557'. Below the main table, there is a calendar view for April 2007 and a resource selection table.

Time	Location	Department	Hospital no.	NHS no.	Name	L	V	S	Telephone	Information
:45	All	All								
12:00	All	All								
:15	All	All								
:30	All	All	T124557		DR FIRSTNAME24557 LASTNAME24557	X		S		
:45	All	All			-- II --					
13:00	All	All			-- II --					
:15	All	All								
:30	All	All								
:45	All	All	T128824		MS FIRSTNAME28824 LASTNAME28824	X	S		99999 999999	X.X. XXXXXX - XXXX XXXXXXXX XXXX XXX XXXX
14:00	All	All			-- II --					
:15	All	All			-- II --					
:30	All	All			-- II --					
:45	All	All	T128463		MRS FIRSTNAME28463 LASTNAME28463	X	S		999999999999	XX.XXXXXXXX
15:00	All	All			-- II --					
:15	All	All			-- II --					
:30	All	All			-- II --					
:45	All	All	T128455		MR FIRSTNAME28455 LASTNAME28455	X	D		99999 999999	XX.XXXXXXXX
16:00	All	All			-- II --					
:15	All	All			-- II --					
:30	All	All			-- II --					
:45	All	All	T128458		MR FIRSTNAME28458 LASTNAME28458	X	S		99999 999999	XX.XXXXXXXX
17:00	All	All			-- II --					
:15	All	All			-- II --					
:30	All	All	T128885		MRS FIRSTNAME28885 LASTNAME28885	X	S		99999 999999	
:45	All	All			~EMMALREC APPLICATION					XXXX.XXXXXX!!!

- The grid in the lower section represents timeslots with either timetable or appointment symbols where a timetable or appointment is created for a resource.
- All symbols for the single resource can be seen in separate rows by selecting **Show in separate rows**. This will show four rows of symbols with **Timetable** at the top, then **Location**, then **Department**, with **Booking** symbol at the bottom.

Resource	08	09	10	11	12	13	14	15	16	17	
09/04/2007	[Grid of appointment symbols]										
10/04/2007	[Grid of appointment symbols with callout: 08:00-18:00 ANNUAL LEAVE]										
11/04/2007	[Grid of appointment symbols]										
12/04/2007	[Grid of appointment symbols]										
13/04/2007	[Grid of appointment symbols]										

## 6.6 Booking information

Information about every appointment or reservation is accessed by right-clicking the respective appointment or reservation.

Booking information
✕

Client: MR FIRSTNAME17850 LASTNAME17850
Time: 03/09/2020 9:30 - 9:45
Attached actions
Close

Appointment  ENT NEW PATIENT MOULD~

Timetable

Made by: SYSTEM ADMINISTRATOR on 03/09/2020

Resource(s): TRAVY

Location: All (no location)

Department: All (no department)

Attn. with

Status

Letter: Verbal: Video appt:

[no status]  
 \*. Appt arranged  
 Q. Cancelled  
**A. Arrived**  
 B. Being seen

Referred by

Reason

Outcome status

Current outcome

Linked Waiting list

Details

Hospital no.: T117850; NHS no.: MR FIRSTNAME17850 LASTNAME17850  
 99 XXXXX XXXX  
 XXXXXXX  
 XXXXXXXXX

Stages condition:

Stage 1	Stage 2	Stage 3	Stage 4
■	■	■	■

Status change Delete

*, Appt arranged	03/09/2020 14:18 [lm]
A, Arrived	03/09/2020 14:19 SYSTEM ADMINISTRATOR

Information

History of changes

Add / Edit / Delete
Edit
Delete

Obs no.	SNOMED code	ICD10 code	Date	Add.	S	Text	Comment

Client observation or procedure
Visit charge

The window holds information about the following topics, some of which are covered in further detail in separate sections below:

- Date and time
- Client name at the top and details, such as personal number and address at bottom left
- The resource who made the booking
- The user and date of appointment creation
- Timetable, Location (if enabled), Department (if enabled) and appointment symbol
- Letter printed or verbally notified; marked with X
- Video Appointment: marked with X
- **Attn. with** can show the relative that attended the appointment with the client – click the Browse button to select from a pre-defined list of relatives or add a new relative
- **Referred by** such as referencing institution

- Appointment status – see below
- Appointment Outcome – see separate section
- History of Appointment Changes
- Further **Information** about the appointment, e.g. special preparations to be made by the audiologist in advance. The information can be modified in the window if required.
- Client observation or procedure
- Visit charge

In the dialogue box, a status can be associated with the appointment/reservation. The possible statuses to be assigned to the appointment/reservation are defined by the system administrator.

The appropriate status can be chosen from the **Status** list, a default status may be configured in System Administration for when the appointment is booked. Status change history is seen in the **Status change** section, showing the duration in waiting or 'being seen' status for instance. When the status has been selected the window closes and the appointment status will be updated on the booking screen.

*Note: If so configured by your system administrator, when setting a status for an appointment, Auditbase may prompt you to also set an Appointment outcome, if the appointment is linked to a referral or waiting list. The user may or may not overrule this mandatory action depending on settings in system administration.*

If the appointment contains several stages, they are seen alongside their conditions in the **Stages condition** area. The condition of each stage can be changed by right-clicking the corresponding cell. After modifying a stage condition, the dialogue box is closed.

**Outcome status** can be selected in the drop-down list. The code is used to describe the outcome of the appointment. The possible values are defined by system administrator.

Linked waiting list can be viewed from the dialog. This is a read only field.

Double-clicking any appointment symbol on the lower grid will open the **Edit booking** window where any feature of the appointment can be adjusted. If changes are made, the **Print letter** window will open on saving.

### 6.6.1 Client observation or procedure

If the appointment has an observation or procedure attached, it will appear in the lower table on the **Client observation or procedure** section/tab in the bottom of the dialog. From here you can also **Add/Edit/Delete** the observation or procedure. When adding an observation/procedure, select the required one from the list and click the **Add to client** button. Should further observations/procedures be required, repeat the process. Upon completion click **Save**. To delete or edit an observation/procedure, select it in the lower table.

*Note: When deleting an observation or procedure from Booking information, it is removed completely from the client record and not just from the appointment.*

## 6.6.2 Visit charge

Visit charge features are primarily used in Sweden. If this is enabled (in System administration) the lower part of the dialog is split in two tabs - **Client observation or procedure** and **Visit charge**.

On the **Visit charge** tab, the following is shown or controlled:

- **Booking code**, identifying the appointment, used e.g. in connection with self-check-in
- **Anonymous number**, used to call patients in the waiting room without compromising the patient's privacy or violating privacy regulations
- **Client identity verification**, used to register if and how the patient's identity has been verified
- **Waiting room**, showing what waiting room will be used for the visit. It can be pre-filled based on rules configured in System administration
- **Appointment fee**, can also be pre-filled based on rules configured in System administration
- **Prohibit Self-check-in**, showing if self-check-in is allowed for the patient. Can be pre-filled based on symbol or locked if the patient has protected identity.
- **Print visit receipts**, allows the user to select and print one or more of the following documents
  - Anonymous number
  - Roadmap or route directions from present location to selected waiting room, and
  - Payment receipt

Booking code	2472	Client identity verified	Not verified	▼
Anonymous number	<input type="text"/>			
Waiting room	<input type="text"/>			
Appointment fee	DIAGNOSTIC	▼	£ 35.00	
	<input type="checkbox"/> Prohibit self check-in	<input type="button" value="Print visit receipts"/>		
Client observation or procedure		Visit charge		

## 6.6.3 Attached actions

To view any clinical actions, documents or IMPs attached to an appointment, click the **Attached actions** button in the upper right corner of the **Booking information** dialogue box. A list of attached clinical and other actions will open in a separate dialogue box.

Attached clinical and other actions [X]

Client MR JOHN SMITH [Detach] [Close]

Appointment 📅 09/01/2020, GWH 1 st, Stassy

Attached clinical and other actions  Select all

	Action date	Action type	Description
<input checked="" type="checkbox"/>	09/01/2020	BKB test	
<input type="checkbox"/>	09/01/2020	AB Words t	
<input type="checkbox"/>	09/01/2020	SIR test	


To detach an action from the appointment, select the check box beside the action, and then click the **Detach** button; to select all actions attached to the appointment, click **Select all**. In the warning message **Do you want to detach the selected data from the appointment?** click **Yes** to complete the operation.

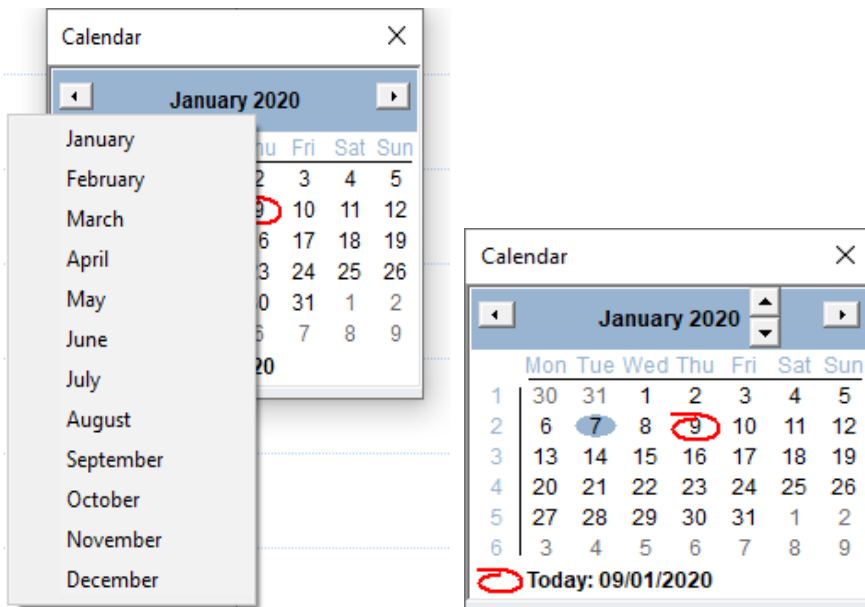
To return to the **Booking information** dialogue box, click **Close**.

*NOTE: You will not be able to detach a posting from the appointment.*

## 6.7 Calendar and refresh

The calendar can be used to select the working date.

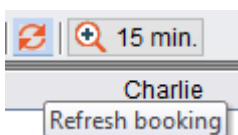
- In the Resource plan, the calendar can be closed or opened using the  button on the menu bar or by pressing **Alt+C**. In the Time plan, the calendar is always shown.
- Today's date is highlighted in blue and displayed at the top of the screen.
- To change the date, move the month and years along using the arrows and click on the relevant date. This will refresh the booking screen.
- For quick access to a specific month, click on the name of the month displayed in the calendar and a drop-down box will appear.



- For quick access to a specific year, click on the year displayed in the calendar and two arrows will appear, making it easier to toggle between years.
- The text at the bottom always displays the current date. If you click on this text, the calendar will refresh to today's date.

*Contact your System Administrator to set the booking screen to auto refresh at a configurable duration.*

- To refresh the symbols and statuses on screen immediately, click on the **Refresh booking** button.



## 6.8 Booking a client directly

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select the date, if required.
- Or double-click on a time slot under the time and resource you require.

*If a client is selected, the **Client appointment** tab is automatically active. To make a reservation, switch to the **Reservation** tab.*

- When making a booking directly, the new appointment will pick up the Location and Department from the Booking module. The Location or Department cannot be changed in the Make booking window as the information is gathered from the timetable.
- From the drop-down lists, select appointment **Reason** and referencing institution if required. Note that if the dialog is opened from **Referral** or **Waiting list**, reason is pre-selected.
- When a patient has been offered an appointment but has declined, before the appointment is made, then there is the option to select “Offer Declined”. In selecting this option the appointment will be recorded in client entries as “Offer Declined”.

*Note: Your system administrator can configure the system to make Reason a mandatory selection.*

*Reasons can be outdated by your system administrator, in which case they do not appear in the list of reasons.*

- Select the appropriate appointment **Symbol**. Out-dated symbols and resources are not shown in the lists. Additionally, if a location is selected in the toolbar, the system filters out symbols and resources associated with any other location.
- Select the **Resource** or resources.
- If more than one resource is selected and one or more are unavailable, you will receive a **Make Booking** information window stating which resource(s) have already been booked. Selecting **Yes** will save the appointment for the free resources. Selecting **No** will return you to the **Make Booking** window where you can change your choice of resources.
- You can modify the date. If you set the date to a date in the past, the same day when an appointment is already made or if an appointment is made in the future, the system displays a warning when you save. However, the system administrator can switch these warnings off.
- Adjust the appointment duration if necessary. The default duration for an appointment is set by the System Administrator. Options for the minute part of the duration are set by the System Administrator and can be from 5 to 55 minutes.
- The start **Time** and **End** time can be entered manually in 5 minute units.
- Check the checkbox if the appointment is to be a **Video appointment**. If the **Video appointments accepted** is not checked, which can be set for the client either here or on the Client Information screen, and an email address or mobile phone number are not recorded for the client, then a warning may appear if configured by your System Administrator.
- Select the **Appointment stages**, if required. The default stages setup is pre-selected. When the client arrives, you can keep track of the appointment by viewing the conditions for these stages in the **Day view** window, **Workflow** view. Note that if a location is selected in the toolbar, the system filters out stages associated with any other location.

*By default, the system selects the resource, the date and start time from the slot you double-clicked to initiate the dialog. You can also select the duration of the appointment in hours and minutes, and the system calculates end time automatically. If the duration for the selected symbol is specified by the system administrator, this duration will be pre-selected.*

- If a recurrence is needed you can also choose **Daily, Weekly, Monthly** or **Yearly** recurrence.
- Selecting a recurrence flips open an additional column where you can edit the recurrence settings.
- The total number of appointments to be generated or an end date of the appointment sequence must be specified.
- The Booking default method is **Book all possible**, which means booking un-booked slots only. This is the recommended setting, but it can be changed according to your requirements.

Day   
 of every  month(s)

The   
  
 of every  month(s)

Selected days

**End of recurrence**  
 End after  occurrences  
 End by date

**Book method**  
 Book all possible  
 Book if all resources can attend  
 All must be available for any to be booked

- Clicking on **Advanced booking** will flip open an extra table in which you can add or remove resources from the appointment.
- To add resources, select the resources in the resource list above and click **Apply**.
- To remove resources, select the resources in the advanced table and click **Remove**.

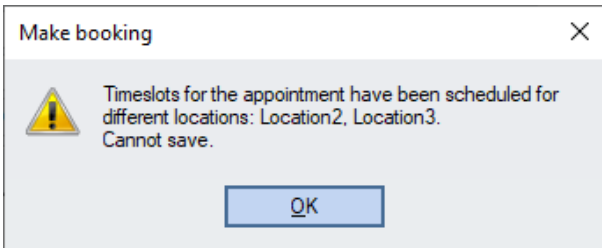
Resource	Time	Duration	Symbol
<More resources>			
Travy	12:45-13:00	0h 15m	PHAC new patient mould~
Stassy	12:45-13:00	0h 15m	PHAC new patient mould~

- Click **Save**.
- When making, copying or editing an appointment, if the selected slot is not the client’s default Location or Department, you will be warned.

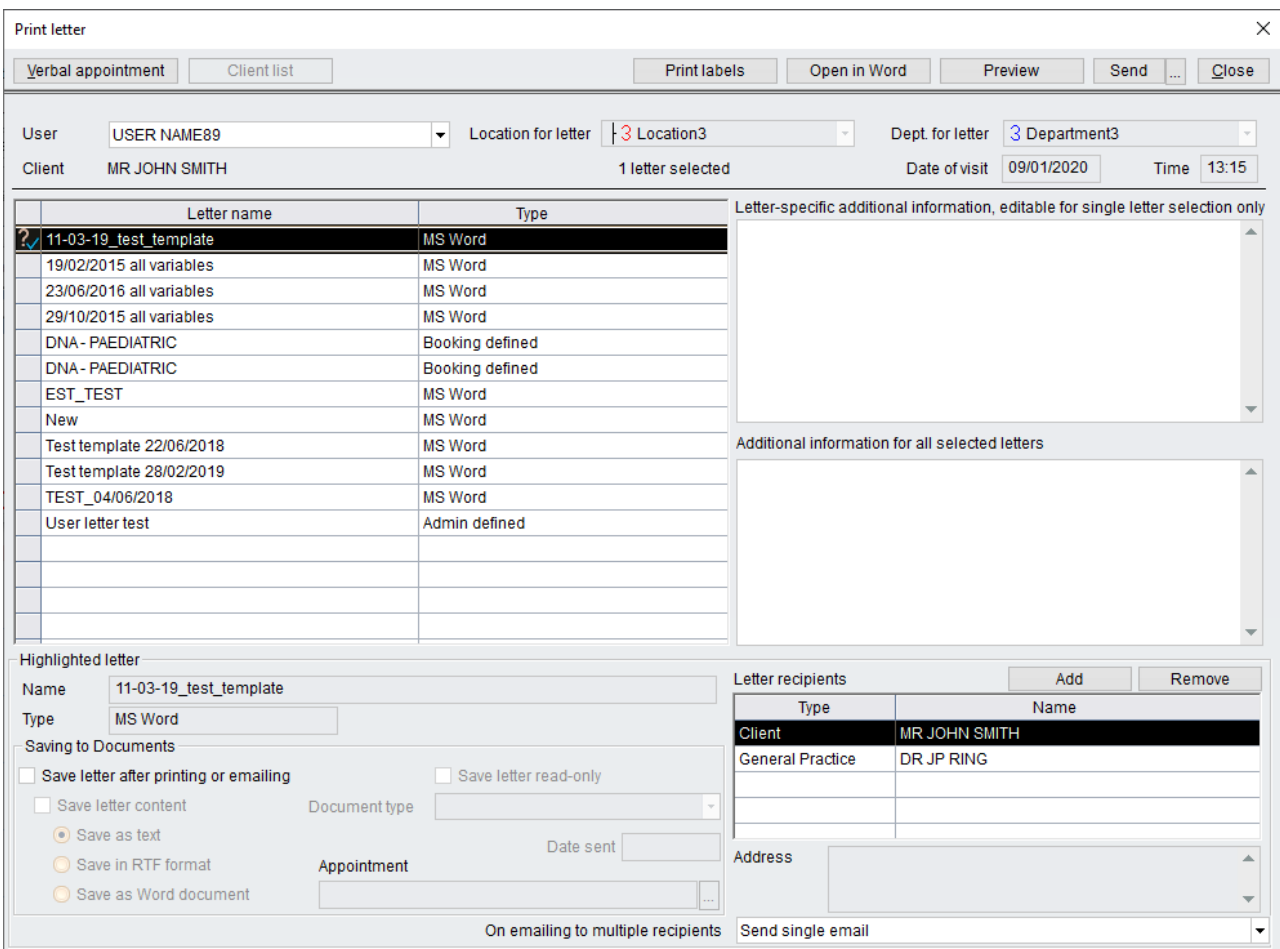
Make booking ✕

Location Location3 is not this client's preferred location. Are you sure you want to save?

- If the appointment is made that is split over two different Locations, you will not be able to save the appointment. You cannot book an appointment in a timeslot with a different Location or with Resources in different Locations as the same appointment cannot take place in more than one location. If you attempt to do this, an error message will be displayed.

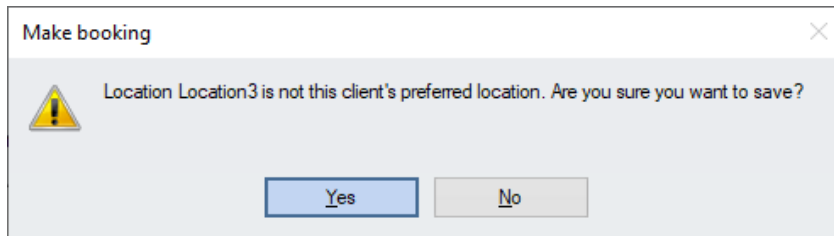


- There is no restriction on making an appointment across two different Departments.
- A default appointment status may be applied, configured by your System Administrator, when the appointment is booked.
- The **Print letter** window appears – fill in the relevant fields and click **Print** or click **Verbal appointment**. The time and date fields can be edited if configured by your System Administrator.



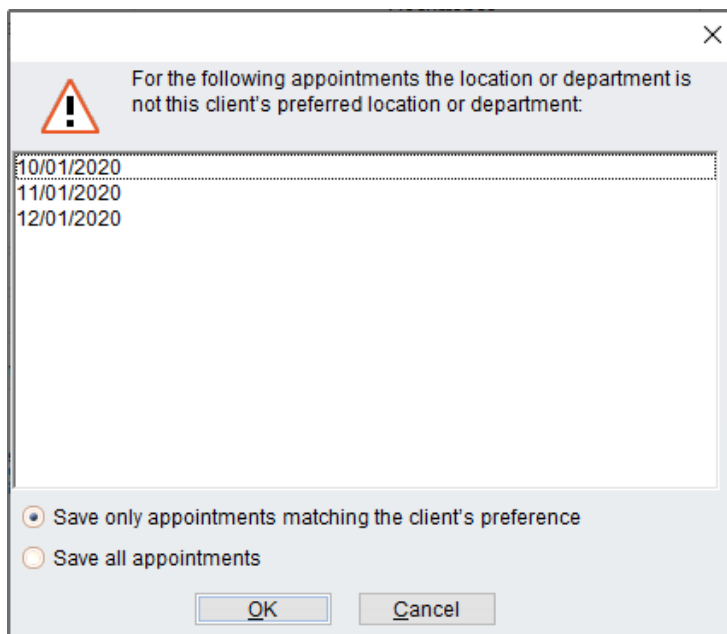
## Recurrent booking

For a recurrent booking, if the selected slot is not the client's default Location or Department, you will get a warning to that effect and will be asked if you are sure you want to save the appointment.



If there are further conflicts, you will be shown the appointments that conflict and will have a choice to either **Save only appointments matching the client's preference** or to **Save all appointments** anyway.

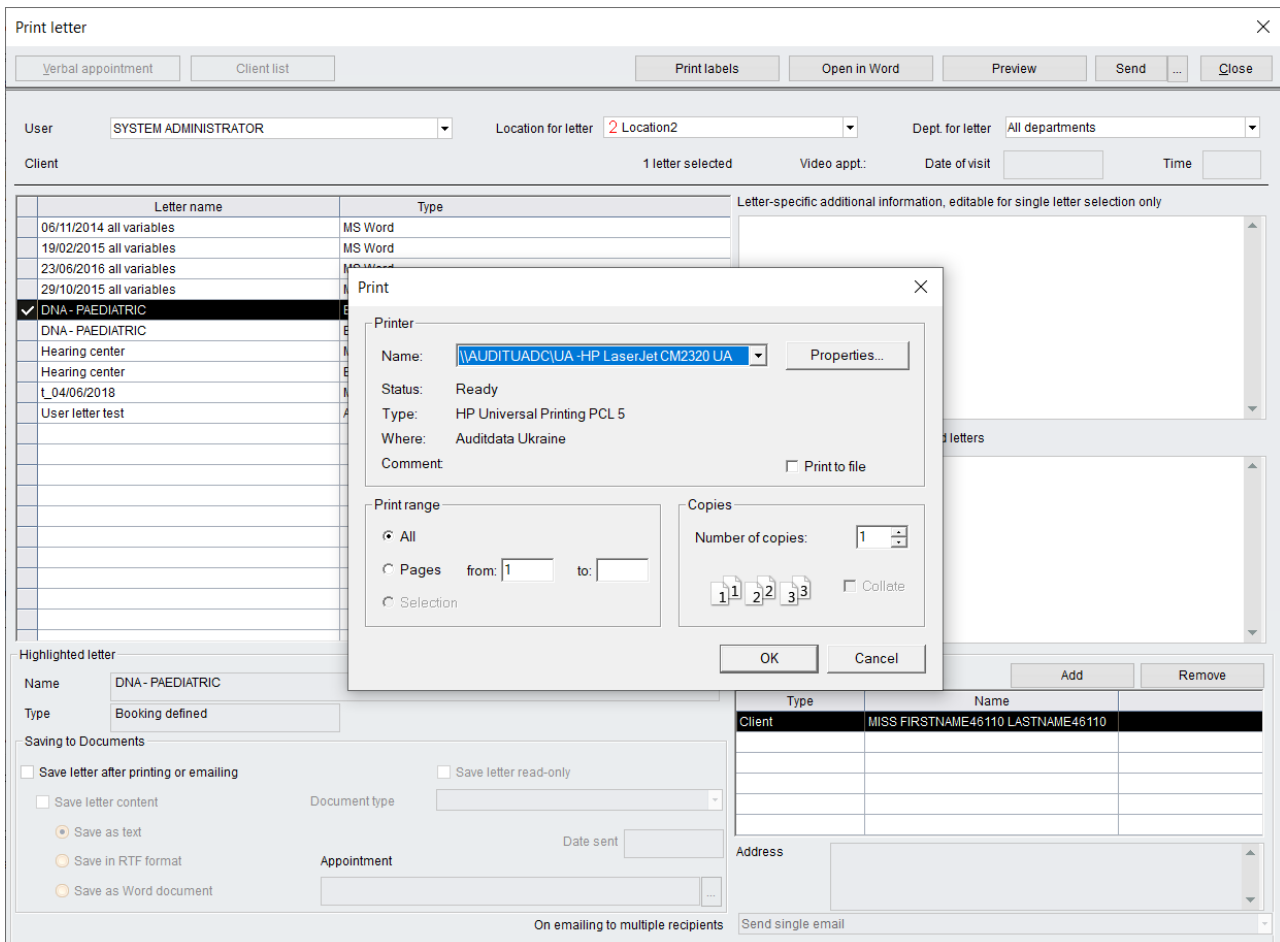
If the Location or Department of some instances of a recurrent appointment is different from the initial instance, then you will be prompted to create them all or just the ones matching the initial instance.



## 6.9 Printing an appointment letter

Letters can be printed directly or when making an appointment. To print a letter directly, select a filled appointment slot and click the Letter button from the Booking screen. This can also be accessed from **File -> Print letter**.

Select the letter (or letters) to be printed and click **Send**. If the default destination is printer, selected letters will be sent to the printer.



Before printing, a letter may be previewed on the screen. To do this, click the **Preview** button in the Letter dialogue.

## 6.10 Making a reservation

- To create a **Reservation**, select the **Reservation** tab. Note that the system selects this tab automatically if no client has been selected.
- Enter a title for the reservation and phone number, if required.
- Enter information, select appointment symbol, reason, booking resource, appointment symbol, date and time range in the same way as for client appointment.
- Press **Save** to save the reservation.
- Reservations are shown in purple on the **Booking** screen.
- Stages are not supported for reservations.
- To search for a reservation, select a resource and type part of the name of the reservation.
- When hitting **Search** all reservations matching resource and name of reservation are listed and can be selected and shown by hitting **Show in appt. book** or by highlighting and double clicking.

## 6.11 Searching for a reservation

You can search for a Reservation, for example, a meeting. Search in the **Functions** menu, **Reservations**.

## 6.12 Making a group appointment

To create a Group appointment, select the **Group appointment** tab.

- Enter the client group name.
- To specify the clients to be included in the group, click **Edit group**.
- The selected client, if any, will be present in the list.
- To add more clients to the list, press **Add**. The system opens the **Client search** dialog, where clients can be searched and selected for the list. When you select a client, the system will prompt you to enter an appointment reason and information.
- To remove a client from the list, press **Remove**.
- To change the appointment reason and information for a highlighted client, press **Edit**. Note that by highlighting a client in the list, you force the system to change the global selected client.
- To print the list, press **Print**.
- Back in the **Group appointment** tab, enter information, select appointment symbol, reason, booking resource, appointment symbol, date and time range in the same way as for client appointment.
- Press **Save** to save the appointment. After saving, the system displays the **Print letter** dialog, where you can print appointment letters for all (or selected) clients.
- Group appointments are shown in green on the Booking screen.

*Stages are not supported for group appointments.*

### 6.13 Booking clients using 'Search for new booking'

When free time for a resource cannot easily be found, the system can search for available time from the **Search for new booking** item.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Click **Edit -> Search for new booking**. This will open the **Search for booking** dialog.

The screenshot shows the 'Search for booking' dialog box with the following details:

- Client appointment** tab is selected.
- Name:** MR FIRSTNAME17850 LASTNAME17850
- Hospital no:** T117850
- Phone:** Home: 99999 999999
- Appointment fee:** [Dropdown menu]
- Waiting room:** [Dropdown menu]
- Prohibit self check-in:**
- Resource** and **Group** radio buttons are present.
- Timetable symbol** list includes: ANY SYMBOL, NO SYMBOL, 1 1, 2 2, NTS, ENT CLINIC, SAV - C&B - Dref / AGR, test, COMMUNITY PAEDIATRIC, PAED Assisting, PAED Hearing Aid Clinic, PAED Transition, SAVERNAKE PAEDS, TIDWORTH.
- Booking symbol** list includes: 1 1, 2 2, from 1, to 1, ENT new patient mould~, PHAC new patient mould~, SAV ENT audio, SAV ENT new patient mould, ttttt1, CLEAR, GWH 1 st, GWH 2nd fit~, GWH Audio assess~, GWH Audio review~, GWH Direct referral~, GWH Earmould, GWH Earmould fit, GWH Exchange, GWH Follow up, GWH Follow up ad-hoc.
- Duration:** 0 hours, 15 min.
- Date range:** From 03/09/2020 To 03/10/2020
- Resource search method:**  All resources are available,  Any resource is available

Resource	After	Before	Duration (hours)	Duration (min.)	Timetable	Location	Departme	Found loc	Found dep	Date	Day
<New criteria>											

- Select the **Reason** for the appointment.
- The **Video appointments accepted** setting for the client can be seen and set from this screen.
- Select the **Resource** (or resources) you want to book for the client from the **Resource** list. Alternatively, select from a resource **Group** to search for the first available appointment for a resource from the group.
- A **Resource search method** should be selected. Choosing **All resources are available** will search for all selected resources and only display slots where all the resources are available. Choosing **Any resource is available** will display an available appointment where any of the selected resources are available.

- Select the appropriate **Timetable symbol or symbols**, more than one symbol can be selected. Select **ANY SYMBOL** if a specific timetable symbol is not required or **NO SYMBOL** if the time is not covered by the timetable to be searched.
- Select a **Booking symbol** for the appointment to be created.
- Adjust the appointment **Duration** if necessary. The default duration for an appointment is set by the System Administrator. Minute options for **Duration** are set by the System Administrator.
- Change the **Date range** as required. Dates can be entered manually, or the calendar at the right of the **From** and **To** fields can be used.
- Enter number of 15-minute **Units** to be booked.
- A **Location** and /or a **Department** can be selected from the drop-down menus when searching for a new appointment. If a specific **Location** or **Department** is not required, **All locations** or **All departments** can be used. The patient's default Location and Department will be automatically selected when a new search is started, but this can be overwritten by selecting from the drop-down menus. The Location and Department is shown in the search results.
- Click **Search**.
- The system fills the table with the selected criteria and performs the search.
- Clicking **Apply** fills the table without performing a search. Use **Apply** when you want to review and/or change criteria before searching.
- In the table, you can do the following, if required:
  - Verify or modify the time **After** and time **Before** as required.
  - Verify or modify the **Duration** of the appointment.
- Click **Search**.
- Verify the found time slot. If the first slot displayed is not appropriate, click on the **Navigation** arrows to show the next available time. The rightmost and leftmost buttons shows the first available timeslot for the next and previous dates respectively, whereas inner buttons "scroll" through timeslots in the current date.
- Verify or modify the found **From** and **To** time.
- Click **Save**.
- Click appointment **Letter** and either send the letter or click **Verbal appointment**.

If Visit charge features are enabled in System administration (Invoice definitions/Preferences) some additional functions will be available in the dialog:

- **Waiting room**, showing what waiting room to be used
- **Appointment fee**, can be pre-filled based on rules configured in System administration
- **Prohibit self-check-in**, shows if self-check-in is allowed for the patient. Can be pre-filled based on symbol or locked if the patient has protected identity.

## 6.14 Booking an appointment from waiting list

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Waiting list**.
- Select the relevant waiting list from the drop-down list or click on **Clients entries** and select the required entry.
- Select the client's entry on the waiting list and click **Book**. The selection may be done by clicking the grey area at the beginning of the row.

Date	Active wait	Wait time	Outcome status	Clock act	Hospital no.	Name	Postcode	DOB	No.
09/10/2007	639 w, 2 d	-587	20b, Cancelled	Counting	T12278	MRS FIRSTNAME2278 LASTNAME2; PC:4541	12/05/1959		1
19/01/2011	468 w, 1 d	-416	20a, Decision to	Counting		MR FIRSTNAME46887 LASTNAME46; PC:208	01/10/1998		2   109075 G.P. letter- FF

- The cursor changes appearance in the booking screen to indicate that you are in the process of making a booking for the client.
- Use the **Calendar** to select the date for the appointment.
- Click under the resource column at the time of the appointment you want to book.
- Select the appropriate appointment **Symbol**.
- Adjust the appointment **Duration** if necessary. The default duration for an appointment is set by the System Administrator. Minute options for **Duration** are set by the System Administrator.
- Select **Appointment stages**, if required.
- Click **Save**.
- Click appointment **Letter** and either **Print** the letter or click **Verbal appointment**.
- The system will then return you to the **Waiting list** module so that another appointment can be booked.

## 6.15 Search and Book from the waiting list

It is possible to search for available appointment slots and book appointments directly from the Waiting list.

To do so:

1. Navigate to the **Waiting list module**
2. From the dropdown, select a relevant **Waiting list**
3. Choose a **Client** for whom the appointment will be booked

Date	Active wait	Wait time	Outcome status	Clock action	Hospital no.	Name
09/02/2010	525 w, 0 d	-473		Counting	T130763	MISS FIRSTNAME30763 LASTNAME30763
16/03/2010	520 w, 0 d	-468		Counting	T190100	FIRST EXTRAMORE LAST
23/03/2010	519 w, 0 d	-467		Counting	T129779	MST FIRSTNAME29779 LASTNAME29779
06/04/2010	517 w, 0 d	-465		Counting	T112441	MISS FIRSTNAME12441 LASTNAME1244
19/04/2010	515 w, 1 d	-463		Counting	T123116	MST FIRSTNAME23116 LASTNAME23116
23/04/2010	514 w, 4 d	-462		Counting	T112842	MST FIRSTNAME12842 LASTNAME12842
24/05/2010	510 w, 1 d	-458		Counting	T125237	MISS FIRSTNAME25237 LASTNAME2523
04/06/2010	508 w, 4 d	-456		Counting	T11632	MST FIRSTNAME1632 LASTNAME1632
11/06/2010	507 w, 4 d	-455		Counting	T141108	MISS FIRSTNAME41108 LASTNAME41108
14/06/2010	507 w, 1 d	-455		Counting	T121523	MISS FIRSTNAME21523 LASTNAME2152
18/06/2010	506 w, 4 d	-454		Counting	T11629	MST FIRSTNAME1629 LASTNAME1629
18/06/2010	506 w, 4 d	-454		Counting	T17289	MISS FIRSTNAME7289 LASTNAME7289
21/06/2010	506 w, 1 d	-454		Counting	T141406	MST FIRSTNAME41406 LASTNAME41406
25/06/2010	505 w, 4 d	-453		Counting	T124407	MST FIRSTNAME24407 LASTNAME24407
25/06/2010	505 w, 4 d	-469		Counting	T119655	MISS FIRSTNAME19655 LASTNAME19655
02/07/2010	504 w, 4 d	-452		Counting	T110119	MST FIRSTNAME10119 LASTNAME10119

In the “**Search for booking**” pop-up window:

1. Specify the **search criteria**
2. Click **Search**
3. Verify the appointment **time slot**
4. **Save** for the appointment to be recorded in the Office timetable

Search for booking
✕

Client appointment
  Reservation
  Group appointment

4
Save Close

Name	MISS FIRSTNAME30763 LASTNAME30763	Information	1y FU - Feb 1192542 - 12 month fu92452aid not working
Hospital no	T130763	Reason	++Patient self referral
Phone	Home: 99999 999999, Mobile: 99999 999999	Referred by	

Resource
  Group

1
2

Resource	Timetable symbol	Booking symbol	Duration	Date range
Travy	ANY SYMBOL	1 1	0 hours 15 min.	23/12/2019 To 23/01/2020
Stassy	NO SYMBOL	2 2		
Charlie	1 1	from 1		
Res109	2 2	to 1		
Res46	NTS	ENT new patient mould-		
Res68	ENT CLINIC	tttttt1		
Res70	COMMUNITY PAEDIATRIC	CLEAR		
Res54	PAED Assisting	GWH 1 st		
Res78	PAED Hearing Aid Clinic	GWH 2nd fit~		
Res73	PAED Transition	GWH Audio assess~		
Res82	SAVERNAKE PAEDS	GWH Audio review~		
Res75	TIDWORTH	GWH Direct referral~		
Res71	Wiltshire PHAC	GWH Earmould		
Res72	123	GWH Earmould fit		
Res105		GWH Exchange		
Res63		GWH Follow up		
Res95	Location1	GWH Follow up ad-hoc		
Res106	Department	GWH Lost aid		
Res102	All departments	GWH Lost aid impression		
Res98		GWH Repair		

Navigation: 23/12/2019

Resource search method:

All resources are available

Any resource is available

Apply Remove

Timetable symbol	Location	Department	Found location	Found department	Date	Day of week	Start time	From	To	Resource	Bool
ANY SYMBOL	Location1	All	Location1	Department1	23/12/2019	Monday	08:30-16:00	08:30	08:45	Travy	1 1

3

## 6.16 Export to MS Outlook

It is possible to export bookings for a single resource for a user specified period to Microsoft Outlook (version 97 or later). All existing appointments in Outlook will be deleted for this period.

The prerequisites for performing this action are:

- The logged on user must be defined as a resource
- The booking screen must be active

With the Auditbase System appointment book displayed on screen, select **File->Export to MS Outlook** and the system will now start communication with Microsoft Outlook.

A window will appear notifying the user if Outlook was successfully initialized or with an error message if not.

Copying appointments/reservations is done for a user specified period (default 30 days back in time-180 days ahead) with selection of which resource's appointments/reservations to be exported.

Click **OK** to open a dialog for the user to answer if all previous appointments in Outlook for the selected period should be erased/overwritten or if Auditbase System appointments/reservations should be added and maybe overlap existing appointments/reservations.

Once finished, a status of the export will be shown if successful or not.

The operation can be performed whether or not Outlook is open. The installed version must be 97 or later and it must be configured for the workstation.

The following will appear for exported appointments in the MS Outlook calendar:

- Subject: Client Appointment [patient ID from Auditbase appointment]
- Start- & end-time: [Time from Auditbase appointment]
- Reminder: Switched off
- Show time as: Busy

*Note:*

- PHONE:  
not displaying
- INFORMATION:  
[Information from Auditbase appointment]

The following will appear for exported reservations in the MS Outlook calendar:

- Subject: [Reservation name from Auditbase reservation]
- Start- & end-time: [Time from Auditbase reservation]

- Reminder: Switched off
- Show time as: Busy

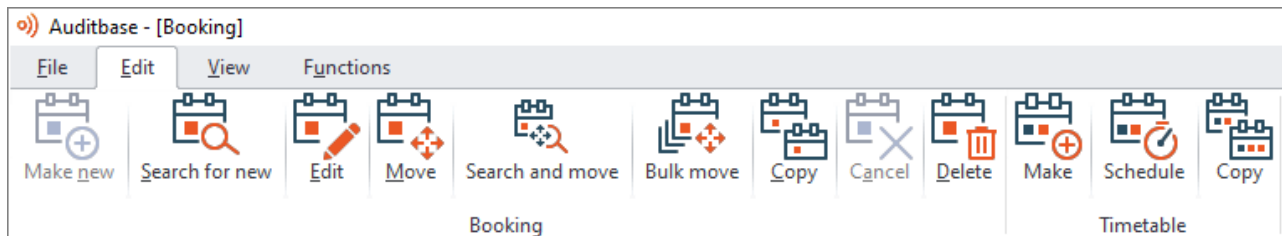
*Note:*

- PHONE:  
[Phone number from Auditbase reservation]
- INFORMATION:  
[Information from Auditbase reservation]

## 6.17 Moving an appointment

- Select the appointment you wish to change from the main booking screen. The client's name will now be highlighted on the screen.
- Select **Edit -> Move** or **Edit -> Search and Move**.
- The cursor changes appearance in the booking screen and the start time of the appointment is highlighted to indicate that you are in the process of changing a booking for the client.
- The symbols for the existing length of the appointment are maintained until the new appointment has been made but the client name is not shown.
- Click on a new date in the **Calendar**. The **Search for New** option can also be selected if a suitable date is not known.
- If the **Search and Move** option has been chosen, the **Search for new booking** window opens and can be used in the usual way.
- Click on the appropriate time slot and resource on the date.
- Click on the appointment **Symbol**; adjust the appointment **Duration** if necessary. The default duration for an appointment is set by the System Administrator. Minute options for **Duration** are set by the System Administrator.
- Click **OK**.
- If a moved appointment breaches the target date for a referral, a breach warning will be displayed.
- Click appointment **Letter** and either **Send** the letter or click **Verbal appointment**.

You can also delete and copy appointments from the **Edit** menu.



*Note: When saving or modifying an appointment, the current date and time will be recorded with the appointment, if so configured in the system administration.*

## 6.18 Changing the Appointment Status and Outcome Code

- Highlight an appointment you want to change the status or outcome code for on the main booking screen and right-click it.
- Select **Outcome status** in the drop-down list. The **Current outcome** can be seen in the **Booking information** dialogue box. This is taken from the referral attached to the appointment. This is always today's current outcome, regardless of whether the appointment itself is in the future or past.
- Select the appropriate appointment **Status**. The **Status change** list will show the duration that the appointment has been in each status.
- The status letter is now seen in the main booking screen next to the appointment.

Booking information

Client: MR JOHN SMITH Time: 09/01/2020 12:45 - 13:00 Attached actions Close

Appointment PHAC NEW PATIENT MOULD~ Location All (no location) Letter:

Timetable Department All (no department) Verbal:

Made by: SYSTEM ADMINISTRATOR on 09/01/2020 Attd. with

Resource(s): TRAVY Status

12:45 Stassy [no status]  
\*, Appt arranged  
Q, Cancelled  
**A, Arrived**  
B, Being seen

Referred by

Reason

Outcome status **SUSP - Suspended**

Current outcome Appointment not linked to referral

Linked Waiting list

Details Hospital no.: T18765; NHS no.: 88888888  
MR JOHN SMITH  
99 XXXXXX XXXXX  
XXXXXX  
XXXXXXXXXX

Status change Delete

*, Appt arranged	09/01/2020 17:34 [18m]
A, Arrived	09/01/2020 17:51 SYSTEM ADMINISTRATOR

Information History of changes

*Note: When saving or modifying an appointment, the current date and time will be recorded with the appointment, if so configured in the system administration.*


An appointment status can be deleted if it has been set in error. Highlight the status and the **Delete** button becomes active. Select this and the status will be removed from the list.

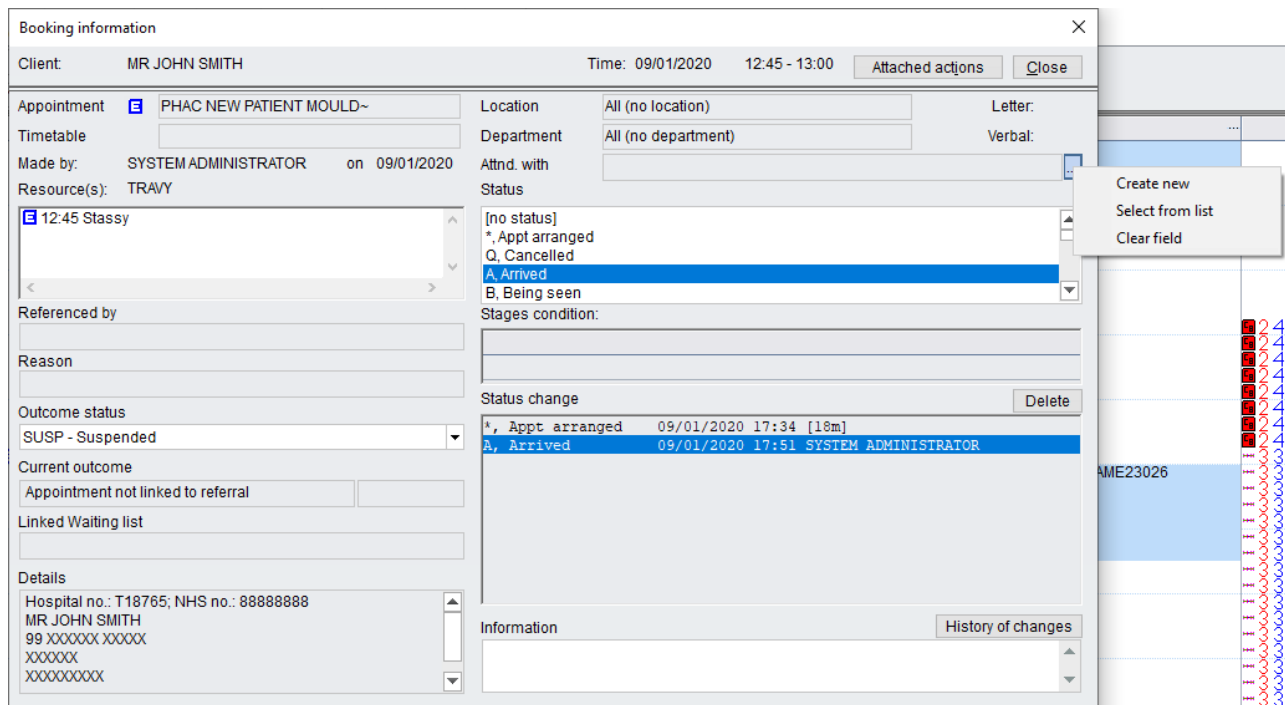
Status change Delete

*, Appt arranged	09/01/2020 17:34 [18m]
<b>A, Arrived</b>	<b>09/01/2020 17:51 SYSTEM ADMINISTRATOR</b>

## 6.19 Changing who the client attended with

On the Booking Information screen, details of whom the client attended with can be added.

- Right click on an appointment.
- Select the  icon at the end of the **Attnd. with** row. You will be presented with three options:
  - **Create New** – Will enable you to add a relative or other contact. Fill in the relevant fields and click **Save**.
  - **Select from list** – If a client has relatives or other contacts attached to their client information, by selecting this option you will see a list which you can select from and attach to the appointment. Highlight the required contact and click **Select**. If the contact does not appear in the list, a new one can be added by selecting **Add**. Contacts can be edited by highlighting the contact and selecting **Edit**. A contact can be removed from the list using the **Delete** button.
  - **Clear field** – This will clear any entry in the **Attnd. with** field.



The screenshot displays the 'Booking information' window for a client named MR JOHN SMITH. The appointment is for 'PHAC NEW PATIENT MOULD~' on 09/01/2020 at 12:45 - 13:00. The 'Attnd. with' field is currently empty, and a dropdown menu is open, showing three options: 'Create new', 'Select from list', and 'Clear field'. The 'Status' section shows a list of status changes, with 'A, Arrived' selected. The 'Details' section shows the client's hospital and NHS numbers, and the 'Information' section is currently empty.

## 6.20 Locating and viewing a previous appointment

Use this function to locate or examine a previous appointment in the appointment book.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Functions** -> **Client's entries** to open the client's appointments and waiting lists window.
- Highlight the appointment you need to view.
- The list of appointments includes Date, Time, appointment Symbol and Status, booked Resource and appointment Reason.
- Select **Show in appt. book**. The system will display the **Booking** screen for that date with the appointment highlighted. You can then edit the appointment if required.
- To view any clinical actions, documents or IMPs attached to the appointment, click the **Attached actions** button. A list of attached clinical and other actions will open in a separate dialogue box where you can detach them from the appointment if needed.
- To delete cancelled actions—they appear in grey—from the history, select them in the list and click the **Delete from history** button.
- When you right-click on an appointment, you can see the **Appointment Information** for an appointment, including information for an outdated resource.

Client's appointments and waiting lists
✕

Client **MR JOHN SMITH**
Close

Appointments list - 42 item(s)

History of changes
Attached actions
Delete from history
Show in appt.book

Date	Time	Loc.	Dept.	Appt.	Status	Resource	Reason	SMS1	SMS2	Declined offer	Symbol
13/01/2020	11:15			1	*	Res46					from1
13/01/2020	09:00			2	*	Charlie					2
10/01/2020	09:00			1	*	Charlie					1
09/01/2020	16:30			5	A	Stassy					GWH 1 st
09/01/2020	13:45			1	*	Stassy					PHAC new patient
09/01/2020	13:15	3	3	1	*	Res54					1
09/01/2020	13:15	3	3	1	*	Res109	++GP direct referral				PHAC new patient
09/01/2020	12:45			1	A	Travy					PHAC new patient

Waiting list entries - 7 item(s)

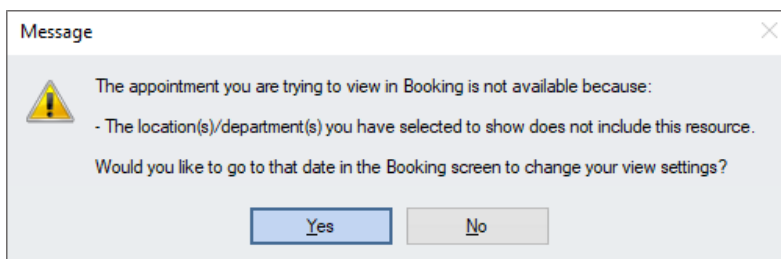
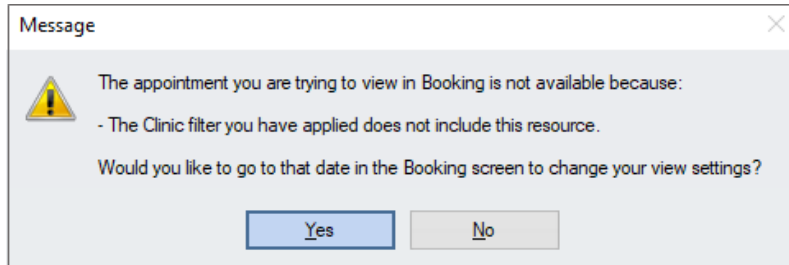
Add
Edit
Show in waiting list

Wait time	Date	Waiting list	Information
-186	18/06	TGW - PHA	
8	06/03	TGW - AUD	
-14	06/03	TGW - CAL	
-21	16/06	TGW - Audi	
9	16/06	TGW - CAL	
13	09/01	TGW - DOM	
20	09/01	TGW - CAL	

- This window also displays the appointments and waiting list entries for the selected client.
- The list of waiting list entries includes **Wait time**, **Date**, **Waiting list type** and **Information**.
- A waiting list entry can only become active if selected from the Waiting list module. Click **Show in waiting list** to make the entry active in the main Waiting list, so that the entry

can be reviewed and edited. There an entry can be created or edited by clicking **Add** or **Edit**, respectively.

- If you select an appointment from the **Appointments list** and **Show in appt book** but either the Location/Department or Clinic filter does not show the selected appointment, you will see an information message letting you know which needs to be adjusted.



- You will need to select **Yes** to go to the appropriate date and then change the filter settings. **No** will take you back to **Client's entries**.

## 6.21 Cancelling an appointment

Client's appointments display any appointments in the appointment book. When a client cancels an appointment, you can cancel it in the system and still keep a record of the appointment on the screen using this procedure:

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Functions** -> **Client's entries**, to view details of forthcoming and previous appointments
- Highlight the appointment you wish to cancel.
- Click on **Show in appointment book**. This will display the diary screen for that date. You can now select the resource for the appointment.
- Highlight the client.
- Select **Edit** -> **Copy booking**.
- The cursor changes appearance in the booking screen to indicate that you are in the process of making a booking for the client.
- From the drop-down list of resources, select **Cancelled** or the name of the resource used to mark cancelled appointments.
- Click in the **Cancelled** column and click **OK**.
- The cancelled appointment is now listed in the **Cancelled** column as an appointment made with the resource **Cancelled**.
- Right-click on the client in the **Cancelled** column and change the appointment status to **Cancelled**.
- Highlight the original appointment again on screen and select **Edit** -> **Move booking** or **Delete booking** and return the client to the waiting list if required.

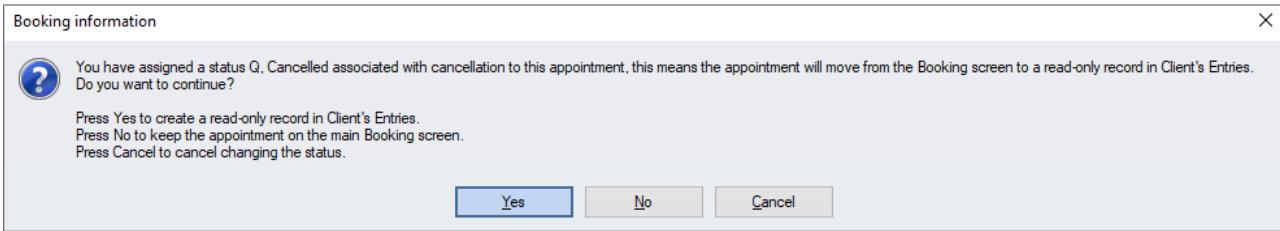
Appointment cancellation can also be supported by moving an appointment to a historical view in the **Client's Entries**. This can be configured in two ways; by setting appointment statuses that will activate the process or by configuring the appointment move action to activate the process.

An appointment status can be set to prompt a user to remove an appointment to a historical view so it is not viewed on the Booking screen. Cancelled appointments are viewed on **Client's entries** and **Referrals** and are shown in grey text and read-only to differentiate them from active appointments.

Appointments can be cancelled and still be seen in Client entries and Referrals (but not Waiting lists), so they no longer need to be copied into a "Cancelled" resource column to retain details of the cancelled appointment. There are two processes for cancelling an appointment.

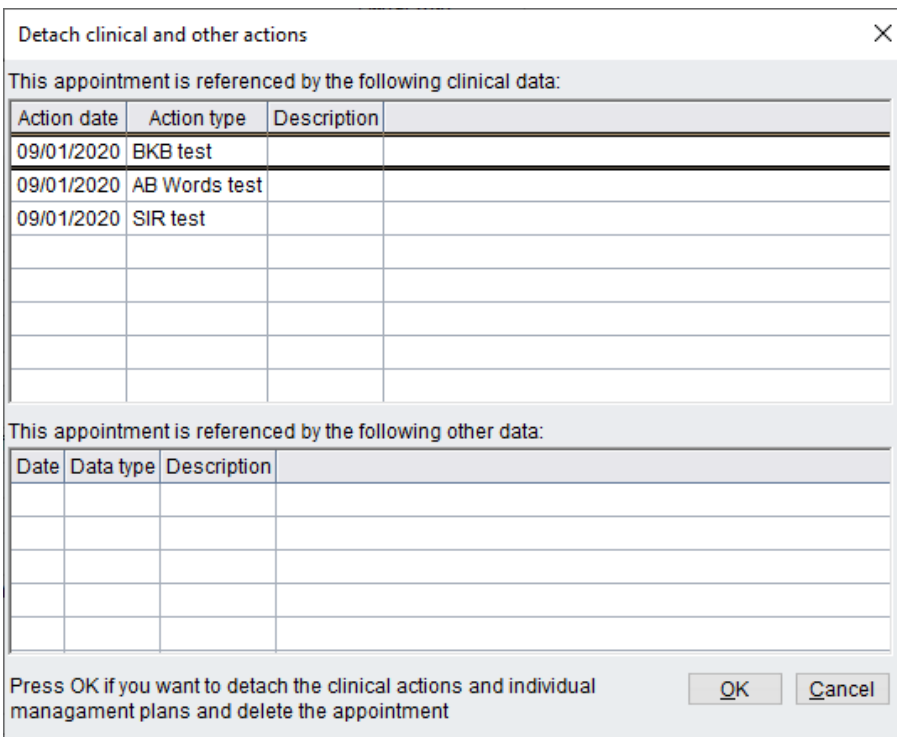
### 6.21.1 Changing the appointment status

On changing the appointment status of a booked appointment to a cancelled status, a booking information message will indicate if the appointment has clinical actions attached to it and that the appointment has been cancelled and enquire if the user wishes to continue with the appointment move procedure.

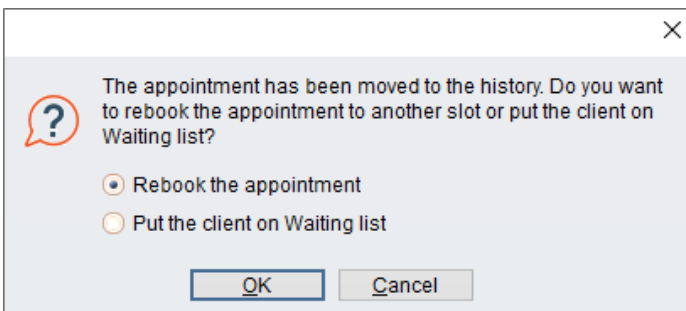


- Select **Cancel** to cancel assigning the status and keep the appointment at the original date and time slot
- Select **No** to retain the cancelled appointment in its original appointment date and time slot
- Select **Yes** to create a read only record in Client's entries.

In case of any attached clinical or other actions the following screen opens:



Once you have selected **OK**, a further information box appears to allow you to add to a waiting list.



- **Rebook the appointment** – Takes you back to the booking screen so that the appointment can be re-booked. If the re-book option is selected, a letter sent to a patient may include the date and time of the cancelled appointment.
- **Put the client on Waiting list** – Opens the Add to waiting list dialogue box. If a client has been booked from a waiting list, Auditbase will remember the original settings.

It is possible to enable an Automatic journal entry, which can define/insert a combination of variables of the cancelled appointment into the Journal automatically.

Journal events
✕

Selected event

1407

Appointment moved to Canceled storage

Keyword

APPOINTMENTS

Prompt for user input     
  Allow to cancel event     
  Save unsigned

Appointment PHAC NEW PATIENT MOULD~ with TRAVY on 09/01/2020 12:45 - 13:00 was moved to cancellation history having a status of Q/ Cancelled

B I U
█
█
█
A

Client's appointments and waiting lists
✕

Client **MR JOHN SMITH**

Appointments list - 42 item(s)     
    
    
    

Date	Time	Loc.	Dept.	Appt.	Status	Resource	Reason	SMS1	SMS2	Declined offer	Symbol
10/01/2020	09:00			1	*	Charlie					1
09/01/2020	16:30			1	Q	Stassy					GWH 1 st
09/01/2020	13:45			1	*	Stassy					PHAC new patient
09/01/2020	13:15	3	3	1	*	Res54					1
09/01/2020	13:15	3	3	1	*	Res109	++GP direct referral				PHAC new patient
09/01/2020	12:45			1	Q	Travy					PHAC new patient
09/01/2020	12:45			1	Q	Stassy					PHAC new patient
09/01/2020	09:00			1	*	Res46					1

Waiting list entries - 7 item(s)     
    
    

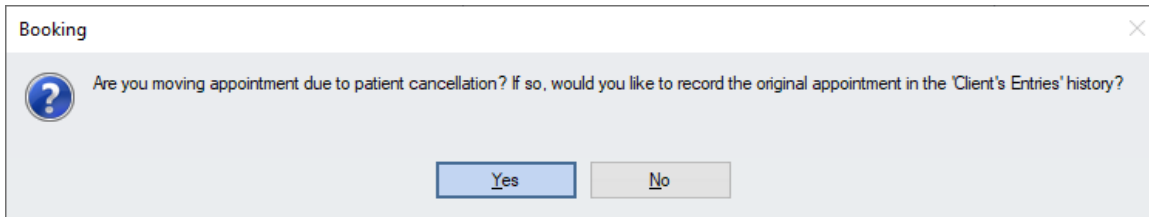
Wait time	Date	Waiting list	Information
-186	18/06	TGW - PHA	
8	06/03	TGW - AUD	
-14	06/03	TGW - CAL	
-21	16/08	TGW - Audi	
9	16/06	TGW - CAL	
13	09/01	TGW - DOM	
20	09/01	TGW - CAL	

If the entry needs to be removed from this list for any reason, then the **Delete from history** button can be selected once an entry has been highlighted.

*N.B. Cancelled appointments appear in grey on the patient's Client entries list. Right mouse-click on the relevant appointment to open the Booking information screen, which shows historical details of the cancelled appointment.*

### 6.21.2 Highlight, Edit & Move appointment

Highlight an appointment and navigate to **Edit** and **Move booking**.



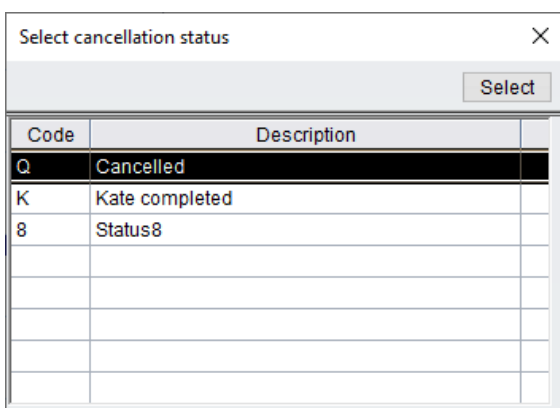
#### Select No

- Select appointment symbol and length, then click **OK**.
- Appointment will be moved to a new slot after the **Letter print** screen has been OK'd.
- No record of the cancelled appointment will be recorded in the client entry.

#### Select Yes

If there is only one appointment status associated with cancellation that status will be applied automatically. If more than one status is associated with cancellation, you will be offered a choice.

Highlight and select (or double click) the appointment cancellation status from the list of potential statuses, as defined by the system administrator.



- Select appointment symbol and length, then **OK**.

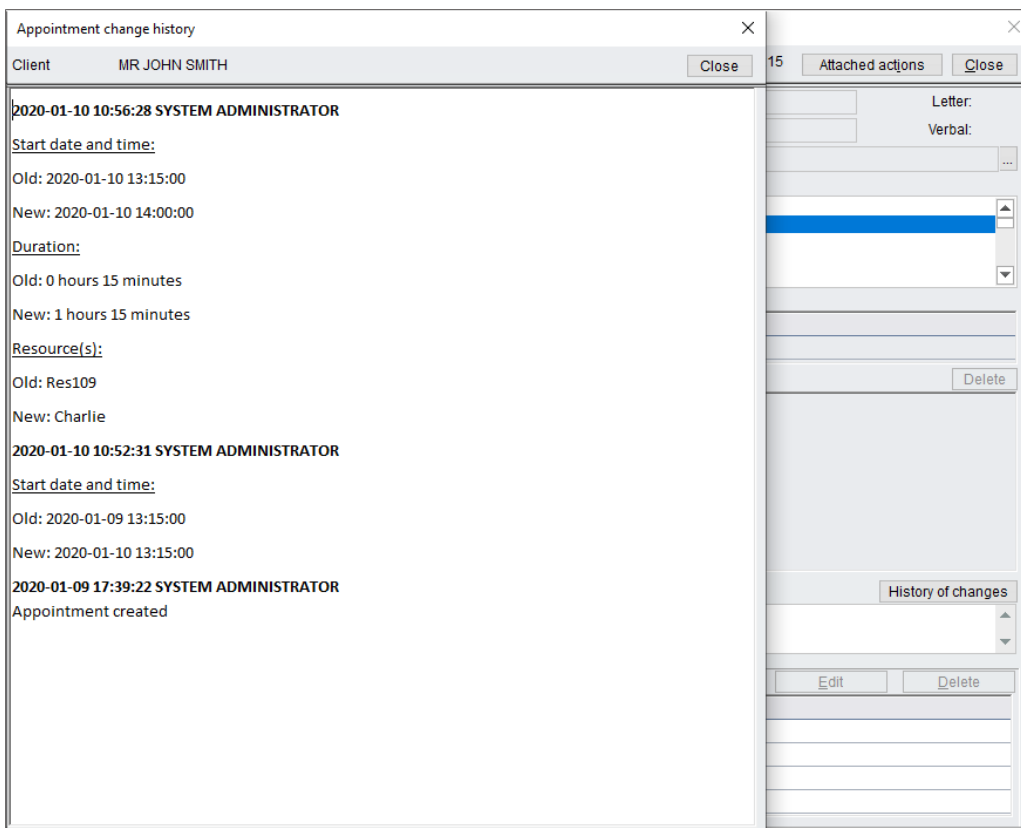
- The appointment will be moved to a new slot after the required action has been taken on the Letter print screen. A letter sent to a patient may include the date and time of the cancelled appointment.
- A record of the original appointment is saved in **client** entries.

*N.B. Cancelled appointments appear in grey on the patient's Client entries list. Right mouse click on the relevant appointment to open the Booking information screen to show historical details of the cancelled appointment. These details cannot be changed.*

### 6.21.3 History of appointment changes

This will need to be activated within System administration.

In the appointment dialog box, pressing the **History of changes** button will open a pop up box. The pop up box will contain a logged history of changes made to the selected appointment. The text log will include appointment creation date, time and user creating the appointment, appointment start date/time and its duration. It will also include the appointment symbol, information and outcome status if one has been selected. These will be listed by date and under username of the person logged in at the time of creation or change. The log can be cleared in Administration.



## 6.22 Viewing a resource's schedule

- Select **File -> Print schedule**.
- Select the **Resource**.
- Enter the date range.
- Select **Print** or printing **Preview**.

Print schedule
✕

Preview
Print
Close

Resource Charlie

From 01/01/2020 To 19/01/2020

NUM SCRL

Schedule - Charlie				
01 January 2020 - 19 January 2020				
<b>9. January 2020 - Thursday</b>				
Time	Hosp No	NHS No	Subject	Duration
8:00 - 8:30	T18765	88888888	MR JOHN SMITH (1) Home: 99999 999999	0:30
13:00 - 14:30	T123026		MR FIRSTNAME23026 LASTNAME23026 (1) Home: 99999 999999	1:30
<b>10. January 2020 - Friday</b>				
Time	Hosp No	NHS No	Subject	Duration
9:00 - 10:30	T18765	88888888	MR JOHN SMITH (1) Home: 99999 999999	1:30
14:00 - 15:15	T18765	88888888	MR JOHN SMITH (PHAC new patient mould~) Home: 99999 999999	1:15
<b>11. January 2020 - Saturday</b>				
Time	Hosp No	NHS No	Subject	Duration
8:00 - 8:15	T1110		MRS FIRSTNAME110 LASTNAME110 (PHAC new patient n Home: 99999 999999 Mob: +1232323	0:15
9:45 - 11:15	T1110		MRS FIRSTNAME110 LASTNAME110 (1) Home: 99999 999999 Mob: +1232323	1:30
<b>12. January 2020 - Sunday</b>				
Time	Hosp No	NHS No	Subject	Duration
10:30 - 12:00	T1110		MRS FIRSTNAME110 LASTNAME110 (to1 ) Home: 99999 999999 Mob: +1232323	1:30
<b>13. January 2020 - Monday</b>				
Time	Hosp No	NHS No	Subject	Duration
9:00 - 9:15	T18765	88888888	MR JOHN SMITH (2) Home: 99999 999999	0:15

Print date: 10 January 2020, AuditBase user: SYSADM
Page 1 of 1

## 6.23 Booking statistics

This is a simple count of the number of appointments for a selected **Resource** or **all Resources** over a specified date range.

Procedure	Time	Amount
1	23h 0m	22
2	1h 30m	3
ENT new patient mould~	1h 0m	1
GWH 1 st	2h 30m	2
GWH 2nd fit~~	1h 0m	2
GWH Earmould	15m	1
GWH Follow up	30m	1
PHAC new patient mould~	2h 45m	6
SAV ENT audio	45m	3
SAV ENT new patient mould~	15m	1
from1	30m	1
to1	1h 0m	1
tttttt1	15m	1

- Go to **Functions** -> **Booking statistics** in **Booking**.
- Enter the **Date** from and to and select a Resource.
- Select **Show** and a list will be displayed showing the **Resource**, **Procedure**, **Time** (in 15 minute blocks) and **Amount** or number of procedures.
- **Print** will send the list to the default printer.

### 6.23.1 Appointment ordinary statistics

- The Appointment ordinary statistics show time used for appointments per date and statuses.

- To open the Appointment ordinary statistics dialog, select **Functions** -> **Appointment statistics** -> **Ordinary statistics** from **Booking**.
- Enter a date interval to show statistics for a required period of time.
- Select Resource in the drop-down list if statistics on a single booking resource are required. Default is **All resources**.
- Select a symbol in the drop-down list if statistics on a single appointment symbol are required. Default is **All symbols**.
- Select statuses: initial in the **From** drop-down list, intermediate in the **Via** list (optional), final in the **To** list.
- Click **Refresh** to calculate the statistics.
- Click **Print** to print the calculated results.
- Click **Export** to file to export the result.

### 6.23.2 Appointment advanced statistics

The Appointment statistics advanced window is accessed via **Functions**-> **Appointment statistics** -> **Advanced statistics** from **Booking**.

Here you can calculate advanced appointment statistics using specified criteria.

- You can calculate the total number of client appointments grouped by different appointment attributes.
- Grouping by the following appointment attributes is possible: Resource, Reason, Symbol, and Status. Calculation of subtotals is also possible.
- Use the Grouping section to specify how to sort the statistics and which total and subtotals are required. The attribute selected in the first drop-down list gives the first sorting criteria of the statistics, the selected attributes in the second and subsequent drop-down lists are the next sorting criteria.
- The **Subtotal** check box near the first drop-down list means that the first-level subtotal will be calculated by the attribute selected in the first drop-down list. The check boxes near the second and subsequent drop-down lists mean subtotals in the first-level total calculated by the attributes selected in the corresponding drop-down list.
- For example, assume that **Reason** is selected in the first drop-down list, **Resource** in the second, **Symbol** in the third, **Status** in the fourth and the **Subtotal** boxes are checked for first and second drop-down lists. In this case, the statistics will be sorted first by reason, then by resource, symbol and status. Statistics will include totals by reason and subtotals by resource for each specific reason.
- Check the **Show detailed rows** check box if you want to include the client appointments the statistics is based on, in the statistics.

All other options in the Calculation criteria are filtering the criteria for the statistics calculation:

- Resource: you can specify which appointment resources should be included in the statistics. At least one resource must be selected. Select all selects all resources.
- Symbol: you can specify which appointment symbols should be included in the statistics. At least one symbol must be selected. Select all selects all symbols.

- **Reason:** you can to specify which appointment reasons should be included in the statistics. At least one reason must be selected. To include appointments without reason, select [No reason specified]. Select all selects all reasons.
- **Status:** you can specify the status for the appointments to be included in the statistics. At least one status must be selected. To include appointments without status, select [No status specified]. Select all selects all statuses.
- **Date range:** use this to include only appointments in a specified date range. Empty date in the range means unlimited interval.
- **Time range:** appointments with start time within a specified time range will be included.
- **Age interval:** appointments for clients with age within a specified interval will be included in the statistics. Empty value in the range means unlimited interval.

When all criteria have been specified, press **Calculate** to calculate the statistics. The result is shown in the **Result table** below. Detailed rows are shown in black and (sub) total rows are shown in blue.

Press **Print** to print the results.

You can export the results to a comma-separated (CSV) file by pressing **Export to file** and selecting a target file in the opened dialog to get results exported into the selected file.

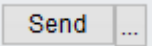
## 6.24 Printing/Emailing a letter

TLS1.2 security level is supported for emailing.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Highlight the appointment.
- Click **Letter**.
- Select a letter name or names if you want to print multiple letters, by checking the box in the left-hand column.
- In the case of a letter for a group appointment, addressees must be selected by entering check marks in the table activated by clicking on the **Client list** button. Note that the system automatically selects all clients in the group.

The screenshot shows the 'Print letter' dialog box. At the top, there are buttons for 'Verbal appointment', 'Client list', 'Print labels', 'Open in Word', 'Preview', 'Send ...', and 'Close'. Below these are dropdown menus for 'User' (USER NAME76), 'Location for letter' (2 Location2), and 'Dept. for letter' (3 Department3). The 'Client' field is set to 'MR JOHN SMITH', and it indicates '1 letter selected'. The 'Date of visit' is '10/01/2020' and the 'Time' is '14:00'. A table lists various letter templates with columns for 'Letter name' and 'Type'. The 'New' template is highlighted. To the right of the table is a text area for 'Letter-specific additional information, editable for single letter selection only'. Below the table is another text area for 'Additional information for all selected letters'. At the bottom left, the 'Highlighted letter' section shows 'Name: New' and 'Type: MS Word'. It includes options to 'Save letter after printing or emailing' with sub-options for 'Save letter content', 'Save as text', 'Save in RTF format', and 'Save as Word document'. There are also fields for 'Document type' (client letters), 'Appointment' (10/01/2020, PHAC new patient mould~), and 'Date sent'. On the bottom right, the 'Letter recipients' table shows 'MR JOHN SMITH' and 'DR JP RING'. There are 'Add' and 'Remove' buttons above this table, and an 'Address' field below it. At the very bottom, there are options for 'On emailing to multiple recipients' and 'Send single email'.

- Select the **User** to sign the letter. If only one resource is booked for the current appointment and this resource has an association with a user, this user will be pre-selected in the list.
- Whether date and time are automatically set and cannot be changed depends on the setting in Administration chosen by your System Administrator.
- If you are printing/emailing a single letter, a part of the pre-configured letter text can be changed in the **Letter-specific additional information** field.

- The name of the employee or further information for all letters can be added in the **Additional information for all letters** textbox. The additional information will be printed at the bottom of the standard letter.
- If the letter is a Word template, you can edit the letter in Word by clicking **Open in Word**.
- Default settings on how to save and letter recipients for each letter template can be set up in the **Letters** dialogue, which you access from the **Booking module -> Functions -> Settings -> Letters**. More on this in the following chapter.
- Edit the saving settings under **Saving to Documents** if necessary.
- The saving settings allow you to save the letter to the **Documents and attachments module** after you have printed it.
- If you save the letter with content, saving in RTF (available for Booking defined templates) or Word format (available for Word templates) will take up more space on the server than if you save as text, which does not include images etc. Unless you really need to save images and formatting from documents, you should choose a plain text format. Text documents will lose all formatting but are still easy to read and edit.
- Check **Save letter read-only** if you do not want the letter to be editable after you have saved it. However, users can be granted the extended user right of “Documents: Remove read-only flag” by the system administrator.
- The **Document type** will only show the document types set up as patient letter document types.
- **Date sent** may be configured in the letter template to automatically be filled out as the current date. This date will be shown in the Documents module. You can change the date manually, if you are not sending the letter on today’s date.
- Name and address values can appear in upper case or mixed case according to a setting in Administration
- The **Appointment** which the letter is about will automatically be displayed.
- Edit **Letter recipients** by clicking **Add** if necessary.
- Select a recipient and click **Remove** if necessary.
- If emailing a letter, it will, by default, place itself in the body of the email as opposed to becoming an attachment to the email. This can be altered by using the browser button next to **Send** on the floating box  .
- If emailing the letter to multiple recipients, select whether to send as a single email or as multiple emails in the **On mailing to multiple recipients** drop down. If sending as multiple emails, you can decide to change for each if you wish to send as body text or an attachment using the browse button above. If sending as body text you can amend the text for each individual recipient. In this case you also alter the subject of the email by clicking into the subject field on the table for each recipient.

### Send single email

Customize print and/or email

OK Cancel

Select all  Update contacts with email address modifications

Type	Name	Email address
<input checked="" type="checkbox"/> Client	MR JOHN SMITH	sona@auditdata.com
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Send as attachment with following body text Subject

Text

### Send separate emails

Customize print and/or email

OK Cancel

Select all  Update contacts with email address modifications

Type	Name	Email address
<input checked="" type="checkbox"/> Client	MR JOHN SMITH	sona@auditdata.com
<input type="checkbox"/> General Pract	DR JP RING	oleksandrp@auditdata.com
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Send as attachment with following body text Subject

Text

- Click **Preview** if you want to preview the letter before printing/emailing. If you are previewing a Word letter, Microsoft Word will open and a floating window will appear. The letter can be adjusted as required and can then be printed/emailed by selecting **Send** or the **single Print** icon at the top of the floating box. In the case of **Send** the appropriate number of letters will be printed/emailed. Select the browser button next to **Send** to make changes to the default send setup. Recipient email address can also be added or amended here and any amendment can be pulled through to the related contact.

- If the letter needs to be saved without printing, **Save and close** will save the letter as a document and close both the floating window and Word.
- If previewing is not required, click **Send** to print the letter on the default printer as defined by the system administrator or to email as defined by the default settings.

## 6.25 Designing a letter

The screenshot shows the 'Letters' dialog box with the following components:

- Buttons:** 'New booking defined template', 'New MS Word template', 'Edit', 'Save', 'Delete', 'Close'.
- Letter list table:**

Letter template name	Type	Booking	WL	Referral	Save after printing	Attach letter to appt.	Set sent date to curr.	Document type	Save content	Save read only
01AudVars	MS Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	client letters	<input type="checkbox"/>	<input checked="" type="checkbox"/>
06.06.2018	MS Word	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
1	Booking de	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
1 Address	MS Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	client letters	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-03-19_test_template	MS Word	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	client letters	<input type="checkbox"/>	<input type="checkbox"/>
123	MS Word	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
19/02/2015 all variables	MS Word	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	client letters	Word doc	<input type="checkbox"/>
1Separate letter	MS Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	client letters	Word doc	<input type="checkbox"/>
1Single letter	MS Word	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	client letters	Word doc	<input type="checkbox"/>
23/06/2016 all variables	MS Word	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	client letters	Word doc	<input type="checkbox"/>
23423	MS Word	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
29/10/2015 all variables	MS Word	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	client letters	Word doc	<input type="checkbox"/>
- Selected template:** Name (text field), Location (dropdown: 'All locations'), Department (dropdown: 'All departments').
- Availability:**  Available in Booking,  Available in Waiting list,  Available for Referral receipt.
- Saving letter:**
  - By default, save letters of this template after printing or emailing
  - By default, attach letter to appointment
  - By default, set date of sending to the current date
  - Default document type (dropdown)
- Saving letter content:**
  - By default, save content of printed letters of this template
  - Save as text,  Save in RTF format,  Save as Word document
  - By default, save letters read-only
- Default recipients:** Table with columns 'Type' and 'Name'. Includes 'Add' and 'Remove' buttons.
- On emailing to multiple recipients:** Send single email (dropdown).

You can design a letter by going to **Functions -> Settings -> Letters** in **Booking**. The dialog gives you a flexible layout, variables in fixed format and complete flexibility when editing letters in Word.

- The **Letter list** contains all letter templates that are currently available.
- You need an extended user right given by your system administrator to modify existing letter templates.
- You can either define a **New booking defined template** or a **New MS Word template**. The booking defined templates are templates created in Auditbase, with already defined building blocks set up by your system administrator. The Word templates are created in Word, which gives you complete flexibility when it comes to the layout.
- The Location and/or Department where an appointment takes place can be added to a letter as a variable in the **Letter specific information** folder. This is shown on the **Location** and **Department** fields on the Letter dialog. These replace the Hearing Centre variable which will be read-only when an appointment has a Location on the Booking screen. The old Hearing Centre variable will still work. If an appointment does not have a Location and/or Department it can be added here.

- If the **Location and Department Filtering option** is installed, **Letters** can be filtered by **Location** and/or **Department** with Location groups and multiple locations options. This filtering is made on the **main Toolbar**.
- Click **Save** to save a new or changed letter in the database.
- The **Delete** function will remove a letter from the database.

### 6.25.1 New booking defined template

- Booking defined letter templates are defined in Auditbase and available from the Booking module and from waiting lists.
- Click on **New booking defined template** and start out by entering name, location, department, availability, default saving settings and default recipients of the letter under **Selected template** (marked by red square in above screen shot).
- To edit a booking defined template, choose the letter in the list and make your changes under **Selected template** and the tab **Edit booking defined template**.
- You can choose whether or not the letter should be Available in the Booking module and/or Available in the Waiting list module.
- The saving settings allow you to save a record of any letter sent with or without content, along with a record of to whom and when it was sent.
- If you uncheck **By default, attach letter to appointment**, the letter is attached to the appointment that the letter is about.
- If you choose not to uncheck **By default, set date of sending to the current date**, the date field will be left empty on the letter.
- If the template contains the audiogram graph variable, a window will open to allow the user to select which audiogram is to be used. The number for the audiogram variable (there can be up to four) will appear at the top of the Audiogram List dialog. A variable is available to show a combined audiogram or split audiogram with separate right and left graphs.
- If you save the letter with content, saving in RTF (available for Booking defined templates) or Word format (available for Word templates) will take up more space on the server than if you save as text, which does not include images etc. Unless you really need to save images and formatting from documents, you should choose a plain text format. Text documents will lose all formatting but are still easy to read and edit. RTF will keep all formatting, but increase the file size, and is harder to edit later because of a frame setup.
- Uncheck **By default, save letters read-only** if you do not want the letter to be editable after you have saved it. However, users can be granted the extended user right of “Documents: Remove read-only flag” by the system administrator.
- Enter text and variables on the tab **Edit booking defined letter**.

- A series of predetermined variables are available for you to enter.
- Once a variable has been selected, place the cursor at the required position and click the button **Insert variable**. The name of the variable will appear with # marks at either side.

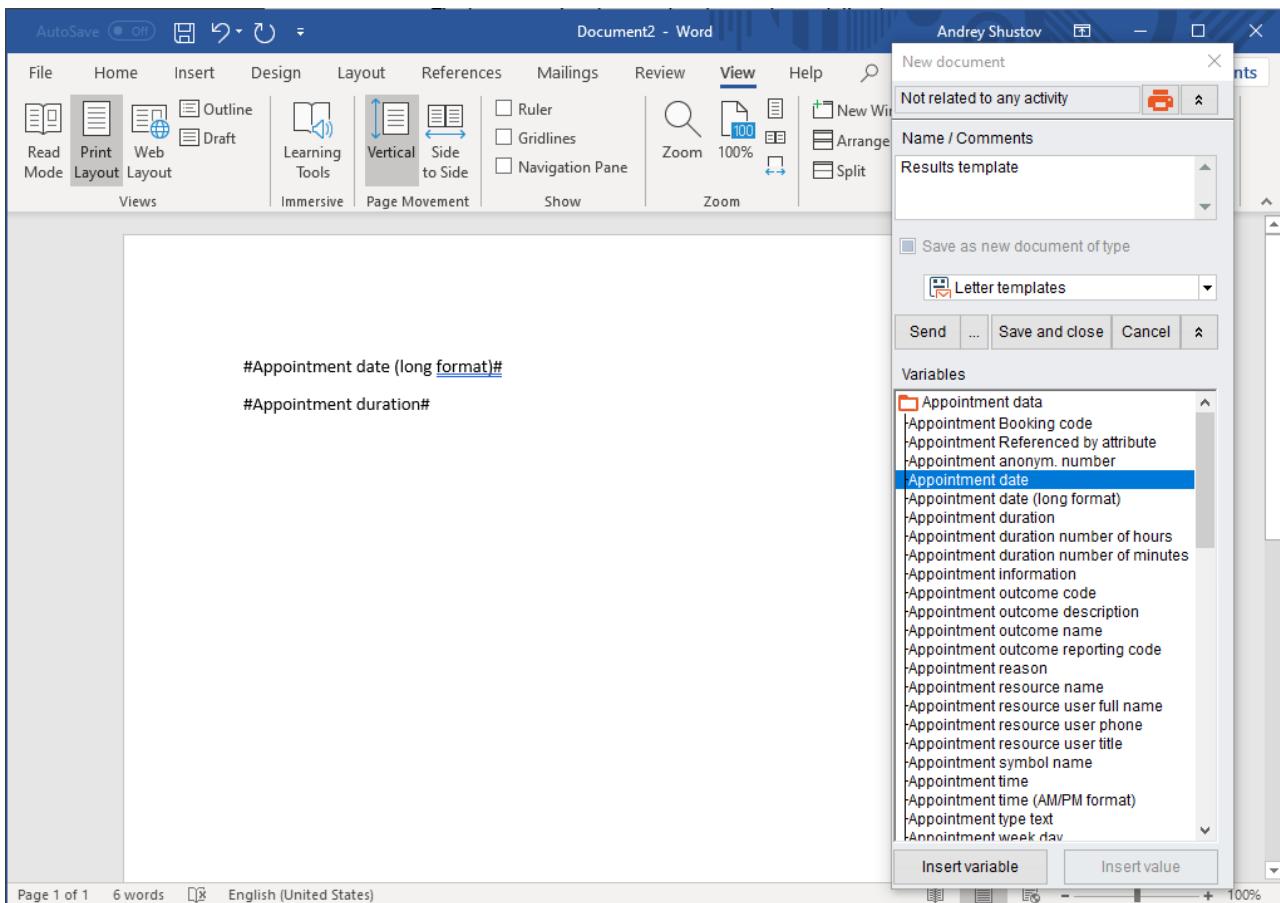
*It is important that you do not edit the variable words inside the # marks, or the variable will not function correctly.*

- You can insert variables in 3 ways:
- Place the cursor at the required position inside the building block/text field and double-click on the variable.
- Place the cursor inside the building block/text field at the position you wish to insert a variable and click on **Insert variable**.
- Click and drag the variable into the required position inside the building block/text field – it is important that you hold the mouse still above the variable before you click and drag the variable into the required position.
- The different text boxes in Booking defined templates can be formatted with the Report Builder. For more information on this, contact the Auditdata support office.

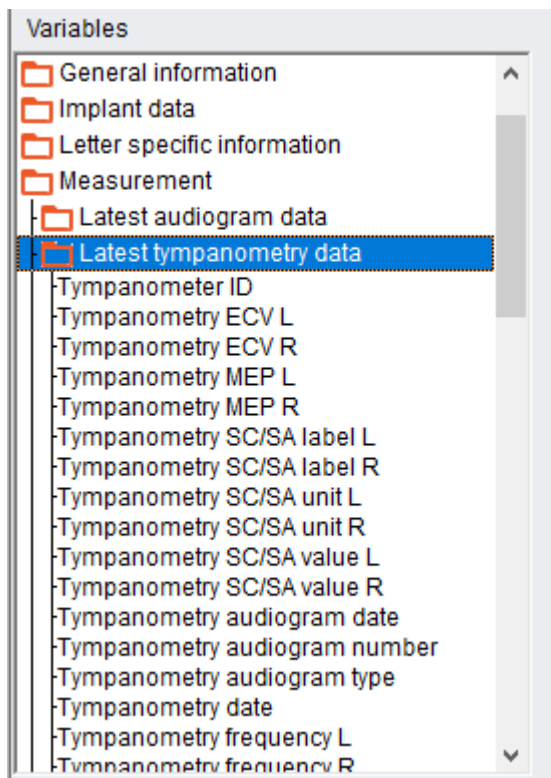
- To look at the layout, select **Print test** and a letter will be printed with the variable names displayed.
- The letter can then be saved and a new letter defined.

## 6.25.2 New MS Word template

- Click on **New MS Word template**, which will open Word and you can create the Word template as you need.



- The variables will remain hidden until you expand them using the arrows, keeping them hidden by default will make this dialog open faster.
- Variables can be nested in folders to help reduce the initial list.



- You can insert variables in the Word template in 3 ways:
  - Place the cursor at the required position in the document and double-click on the variable.
  - Place the cursor inside the document and click on **Insert variable**.
  - Click and drag the variable into the required position in the document – it is important that you hold the mouse still above the variable before you click and drag the variable into the required position.
- If the template contains the audiogram graph variable, a window will open to allow the user to select which audiogram is to be used. The number for the audiogram variable (there can be up to four) will appear at the top of the Audiogram List dialog.
- Name and address values can appear in upper case or mixed case according to a setting in the Administration tool.
- When finished with your document, click on **Save and close**.
- To close without saving, click on **Cancel**.
- Back in Auditbase, you can now edit the name, availability, saving settings and default recipients under **Selected template**.
- You can choose whether or not the letter should be **Available in the booking module**, **Available in the Waiting list** module or **Available as a Referral receipt**.
- The saving settings allow you to save a record of any letter sent with or without content, along with a record of to whom and when it was sent.
- If you check **By default, attach letter to appointment**, the letter will be attached to the appointment that the letter is about.
- If you choose not to uncheck **By default, set date of sending to the current date**, the date field will be left empty on the letter.

- If you save the letter with content, saving in RTF (available for Booking defined templates) or Word format (available for Word templates) will take up more space on the server than if you save as text, which does not include images etc. Unless you really need to save images and formatting from documents, you should choose a plain text format. Text documents will lose all formatting but are still easy to read and edit. RTF will keep all formatting, but increase the file size, and is harder to edit later because of a frame setup.
- Uncheck **By default, save letters read-only** if you do not want the letter to be editable after you have saved it. However, users can be granted the extended user right of “Documents: Remove read-only flag” by the system administrator.
- Word templates are editable in Word by choosing the letter in the list and clicking **Edit**.

### 6.25.3 Default recipients

It is easy to add or remove default recipients of letters.

- Choose the letter in the list.
- To remove recipients, choose the recipient you want to remove and click **Remove**.

Default recipients	
Type	Name
Client	
All rels. and other contacts marked as	

- To add default recipients, click on **Add** to select which group or specific recipients you want to add as default recipients of the letter.

Add default recipient to letter template ✕

---

Select recipient

Client

Referral referring agent

All relatives and other contacts marked as CC

All professional contacts

Specific professional contact type Registered Practice ▾

Specific referring agent ... ▾

Specific relative or other contact Mother ▾

- You can add the selected **Client**.
- You can choose to add **All relatives and other contacts marked as CC** in the **Client information** module under the tab **Contacts**.
- You can add **All professional contacts**.
- You can add just a **Specific professional contact type**.
- You can add a **Specific referring agent**.
- And you can add a **Specific relative or other contacts**, even if they have not been marked as **CC** in the **Client information module**.
- The changes you have made are automatically saved to Auditbase.
- The full list of recipients can be added to the letter by using the variable **List of recipients** under **Letter specific information** either when editing a booking defined template in Auditbase or when adding variables in an MS Word template.

## 6.26 Making timetable

Timetable functionality can be restricted to line managers by the system administrator.

Timetables now consist of not just the Timetable symbol representing the clinic type but also the Location and Department symbols if these are used. All locations(No Location) and All departments(No department) can be used if Location and Department Filtering has not been set up. If there is to be no change in Location or Department, the [No Change] option can be selected. This will not overwrite any existing Locations or Departments.

As the Location of an appointment can be used in a Letter, if the Location of an existing appointment is changed when making the Timetable, the user will be requested to generate new appointment letters for all affected clients.

Timetable symbols have a default Location and Department set up in the System Administration tool. When making a timetable, if Location filtering is licensed, the default Location or Department for the selected symbol can be taken as the default or, by checking Select location/department from Booking screen as default, the default Location and Department is taken from the toolbar in the Booking screen.

If part of the timespan selected is occupied with appointments having a different Location or Department then the new selection will not be applied.

Timetable details can be entered via one of the following three functions:

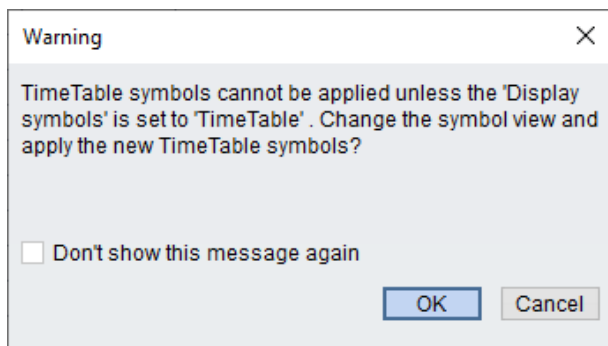
- Direct editing
- Scheduling
- Copying

### Direct editing

Select a date in the **Calendar**.

- Select **Edit -> Make timetable** or press **F9**.

- Select a symbol in the list and enter the number of 15 minute time slots.
- If activated, select a Location the appointment relates to. The location symbol will display next to the timetable symbol on the booking page.
- If activated, select a Department the appointment relates to. The department symbol will display next to the location symbol on the booking page.
- If you are in **Resource** plan, click the timeslot on the resource you want to create.
- If you are in **Time plan**, click a timeslot on the resource/time grid.
- In both cases, the system marks the requested number of timetable slots by the selected symbol.
- When in Time plan the system automatically defaults to showing only Timetable symbols. However, you can check the box next to Booking under Display symbols to see Booking symbols as well.
- Once you click to make the specific timetable, you are prompted to turn off Booking symbols again for the system to be able to enter the Timetable symbol.



- Click **OK** and the booking symbols are automatically turned off and your new Timetable symbol is visible in the time grid.

## 6.27 Scheduling timetable

- Select **Edit -> Schedule timetable**.

- Select **Resources** in the list.
- Select a **Timetable symbol**. Note that outdated symbols are not shown in the list.
- If activated, select a **Location** the schedule will relate to.
- If activated, select a **Department** the schedule will relate to.
- Select **Date** and enter **Duration**.
- Set **Recurrence** if required. If the **Monthly** tab is chosen, you use the arrow buttons to add multiple criteria.
- Choose the desired **Schedule method** - the default is 'Prompt for each conflict'.
- **Apply** to create timetable and leave the window opened.
- **Save** to create timetable and close the window.

As the Location of an appointment can be used in a Letter, if the Location of an existing appointment is changed when rescheduling the Timetable, the user will be requested to generate new appointment letters for all affected clients.

When scheduling a Timetable there are options to control whether symbols that are already in Booking should be overwritten or not. Any appointments that have already been created will not be split between more than one Location or Department.

The list of options is the following (including comments):

- **Do not overwrite existing timetable, location and department symbols** – Any existing timetable symbols will not be overwritten and there will be no warning; if part of the timespan selected is occupied with appointments having a different Location or Department, then only the part of the timespan that is available will be updated with timetable, location and department symbols.
- **Overwrite existing symbols only where appointment is not booked** – Any existing timetable, location and department symbols will be overwritten only where there is no appointment booked;
- **Overwrite existing symbols even if appointment is booked and re-generate letter.**
  - \*) **Overwriting of timetable symbol only does not re-generate letter** – If an appointment has been booked next to a timetable symbol, the symbol will be overwritten but you will be asked if you want to send a new letter to the client if the Location is changed;
- **Prompt for each conflict.**
  - \*) Location/department will not be saved to slots with appointments if that causes appearing the same appointment in different locations/departments – If there is a conflict between the timetable you are scheduling and the existing timetable symbols, you will be asked to confirm the change. Appointments will not be booked if the appointment location and department clashes with the timetable location or department.

Timetable symbols have a default **Location** and **Department** set up in the System Administration tool. When scheduling a timetable, if **Location and Department Filtering** is licensed, the default Location or Department for the selected symbol can be taken as the default or, by checking **Select location/department from Booking screen as default**, the default Location and Department is taken from the toolbar in the Booking screen.

## 6.28 Copying timetable

- This facility may be used for duplicating the timetable to further days or weeks.
- Select **Edit -> Copy timetable**.

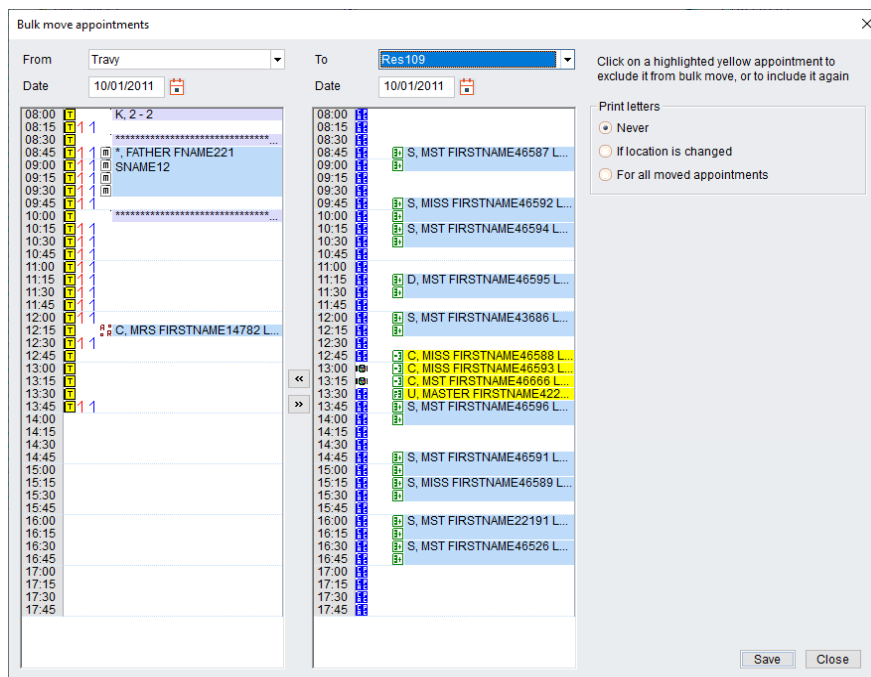
- Now you can choose when to get notified if changes to appointment Locations are found, which requires new letters to be created
  - If necessary to speed up the process of Copying timetable, use the option “**Notify after changes are made...**”
- In **Copy from resource** drop-down list, select a resource the timetable is created for, which is to be copied to another resource. Select [**duplicate**] in that list where the timetable is to be duplicated for a resource or resources.
- In **Copy to resource(s)**, select resources the timetable should be created (copied) for.
- When copying a timetable, you have the option to overwrite or not overwrite the Timetable, Location and Department symbols (**Overwrite existing timetable**).
  - If you choose to overwrite the timetable and if the Location or Department of an existing appointment is changed, when copying the Timetable, you will be requested to generate new appointment letters for all affected clients.
  - If you choose not to overwrite the timetable then only if all four symbols are empty will the Copy action take place for a particular timeslot.
- In **Copy from**, specify source days’ timetable should be copied from.
- In Copy to days or Copy to weeks, specify target date range. If two or more weekdays are selected, only **Copy to weeks** is available.
- When you select the **Copy to days** option, you can specify the days when the timetable should be copied to.

- Click **Edit pattern**. The system opens the **Recurrence** window where recurring days can be specified on a Daily, Weekly, Monthly or Yearly basis.
- If you select **Copy to weeks**, you can specify copying on weekly basis. Week number range and sequence of week numbers can be specified.
- **Apply** to copy timetable and leave the window opened.
- **Save** to copy timetable and close the window.

## 6.29 Bulk move from Resource to Resource

When a resource is going to be unavailable and you need to move appointments in bulk from one resource to another, the Bulk move facility can be used.

- **Edit -> Bulk move.**
- Select the **From** resource and the **To** resource from the drop down lists of resources. By default, the active Resource will be selected.
- Select the from **Date** and the to **Date** using the calendar icon or by entering a date.
- By default, the active date will be selected.
- The appointments that can be moved will be highlighted in yellow. If an appointment cannot be moved, the appointment will stay in its original position and will not be highlighted.
- If a highlighted appointment is not to be moved, click on the appointment and it will move to left in its original position.
- The left and right arrows can also be used to move all appointments from one resource to the other.
- You can decide if letters should be printed **Never, If location or department is changed or For all moved appointments.**
- Once you have made your selections, **Save** will move the appointments to the selected resource.
- Once this has been done, the appointments cannot be moved back except by restarting the bulk move option.
- If all the appointments could not be moved from the **From** resource, the **Bulk move appointments window** will stay open so that further moves can be made.
- **Close** will shut down the **Bulk move appointments** window.



If an appointment is a multi-resource appointment, it can only be moved if the locations match or there is no location set up in the To resource.

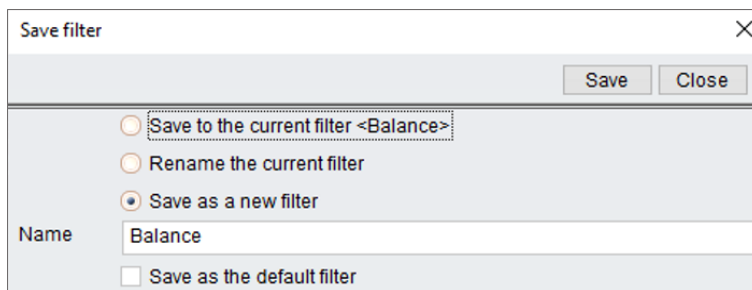
Reservations cannot be moved using this method but must be moved individually.

## 6.30 Efficiency Analysis

The Booking screen can be analysed to search for empty slots, unscheduled appointments or appointments in the timetable within a date range or slots that cannot be completely filled by appointments types of a defined length. Clients that have multiple earmoulds can also be found here. These are found on **Booking -> Functions -> Efficiency analysis**. There are several tabs which look for specific information.

The Efficiency analysis window can be collapsed to make viewing the Booking screen easier. This is done by using the arrows at the top right of the window. This creates a floating panel which can be moved to anywhere on the screen that is convenient. The same arrows can then be used to expand the windows.

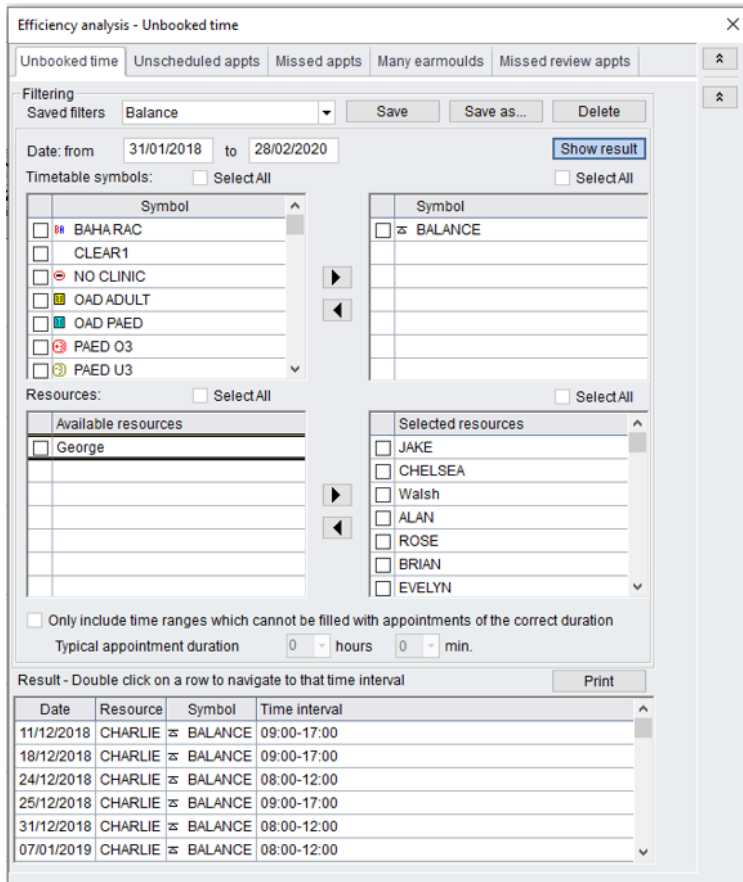
Once a filter has been created it can be saved with a name. Once Save has been selected a window will appear which will give you options depending on whether this is the first time the filter has been saved or if it is being updated.



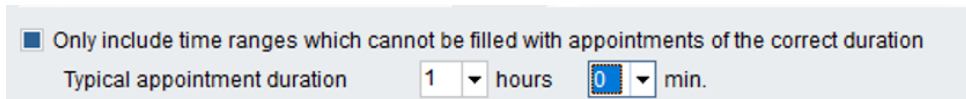
- You will need to give the filter a **Name** and decide if this filter will be the default filter by selecting **Save as the default filter**.
- If you do not want to **Save** this filter, select **Close** to shut the window without saving.
- To modify a current filter, choose one from the drop-down list of **Saved filters**, make any required modifications and then **Save as...**
- A **Save filter** window will appear with options to either **Save to the current filter**, **Rename the current filter** or **Save as a new filter**. You can also decide if this filter will be the default filter by selecting **Save as the default filter**.

### 6.30.1 Unbooked time

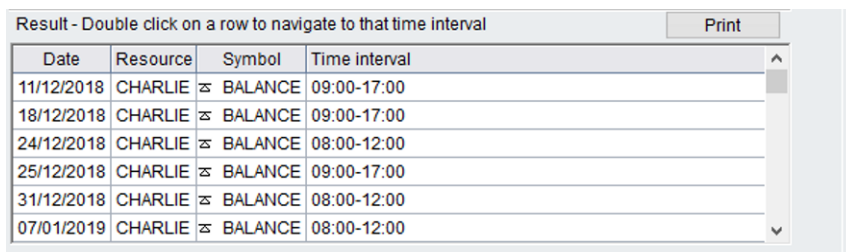
- Enter the required date range. This can be done by entering a date in the **Date: from** and **to** fields or by right clicking on the fields and selecting a date from the calendar.
- **Timetable symbols** can be selected by checking the box next to their name or by checking the **Select All** box and then using the arrow to move them to the right. The 'no symbol' option is not available; timetable symbols must be applied to search for gaps.
- **Resources** can be selected by checking the box next to their name or by checking the **Select All** box and then using the arrow to move them to the right.
- Once symbols and resources have been selected, the **Show result** button is highlighted in yellow to show that the analysis can be run.
- The result of the analysis is shown in the bottom section. To navigate to a particular time slot, double click on it and you will be taken to the empty slot.



- If you want to see only time slots that cannot be completely filled by an appointment of a set duration, select the check box and set the **Typical appointment duration**.



- The results will now be filtered to show only slots that cannot be filled completely by the set duration. In this example, a one hour and 15 minute empty slot will be shown because a one hour and 15 minute appointment cannot completely fill the empty slot. A two hour slot would not be shown as two one-hour appointments can fill the empty slot.



- This panel can be further collapsed so that maximum screen can be seen without the need to re-start the analysis.
- Appointments can now be adjusted or moved to maximise the use of the available time.

- The results of the analysis can be sent to a printer using the **Print** button. The print out will show the results by resource and then by date.

### 6.30.2 Unscheduled Appointments

The result of this tab will show the number appointments for client above the normal requirement for that appointment type.

- Enter the required date range. This can be done by entering a date in the **Date: from** and **to** fields or by right clicking on the fields and selecting a date from the calendar.
- **Appointment symbols** can be selected by checking the box next to their name or by checking the **Select All** box and then using the arrow to move them to the right. The 'no symbol' option is not available; appointment symbols must be applied to search for appointments.

Efficiency analysis - Patients attending multiple unscheduled appt types

Unbooked time | **Unscheduled appts** | Missed appts | Many earmoulds | Missed review appts

Filtering  
 Saved filters: <New filter> Save Save as... Delete

Date: from 30/12/2018 to 30/12/2020 Show result

Unscheduled appointment types:  Select All

Symbol	Symbol
<input type="checkbox"/> COMM ASSESS/REM	<input checked="" type="checkbox"/> I 1ST IF/ISSUE
<input type="checkbox"/> W WALK IN REPAIR	<input checked="" type="checkbox"/> P- PR HAREPAIR
<input type="checkbox"/> A ASSISTING PAEDS	<input checked="" type="checkbox"/> IMPLANT ANNUAL RV
<input type="checkbox"/> T <sub>A</sub> TINNITUS ASSESS	<input checked="" type="checkbox"/> F IMPLANT FU
<input type="checkbox"/> T <sub>F</sub> TINNITUS FU	<input checked="" type="checkbox"/> S SWITCH ON
<input type="checkbox"/> C CLINICAL NON PT	<input checked="" type="checkbox"/> S SURGERY
<input type="checkbox"/> B ADMINISTRATION	<input checked="" type="checkbox"/> A IMPLANT ASSESSMENT

Minimum number of appointments: 1

List of patients selected by params above (Appts total not including Group Appts) Export

Hospital no.	NHS no.	Name	Appts. total
0000001	111 111 1111	COLONEL CHARLIE HARPER	2
T121220		FRED	1

Result - Double click on a row to navigate to that appointment  Show All

Date	Resource	Symbol	Status	Time interval
24/04/2019	CHARLIE	I 1ST IF/ISSUE	D	12:30-13:15
04/01/2019	BERTA	P- PR HAREPAIR		11:15-11:45

### 6.30.3 Missed Appointments

The result of this tab will show appointments that have a certain appointment status.

- Enter the required date range. This can be done by entering a date in the **Date: from** and **to** fields or by right clicking on the fields and selecting a date from the calendar.
- **Statuses indicating unattended appointments** can be selected by checking the box next to their Description or by checking the **Select All** box and then using the arrow to move them to the right.
- The **Minimum number of appointments** can be set so that patients that have missed multiple appointments can be seen.
- Patients that need to be excluded from the result due to their alert or parameter settings, can be excluded by selecting the **Exclude patients with alerts and parameters** button which will open a window where **Alerts** (with a Code) and **Parameters** (without a Code) can be selected.

Select alerts and parameters
✕

Exclude patients with alerts and parameters
Apply

Select All

Select All

	Code	Description
<input checked="" type="checkbox"/>	D	Deceased
<input type="checkbox"/>	M	Moved
<input type="checkbox"/>		Wheelchair
<input type="checkbox"/>		2 Person lift
<input type="checkbox"/>		War Pensioner
<input type="checkbox"/>	T	Transport
<input type="checkbox"/>	P	Private Patient

▶  
◀

	Code	Description

- If an **Alert** or a **Parameter** has been selected, then the exclusion message is shown.

Exclude with alerts and parameters

Alert and param. exclusion is on

- Once **Show result** has been selected, a **List of patients selected by params above (Appts total not including Group Appts)** is shown in the window.

List of patients selected by params above (Appts total not including Group Appts)
Export

Hospital no.	NHS no.	Name	DNA'ed appts. total	Appts. total
0000001	111 111 1111	COLONEL CHARLIE HARPER	6	18

- By selecting one of these patients, the appointments for the selected patient is shown in the bottom window.

- The **Export** button will open a window where the results can be saved as a CSV file so that it can be opened in Excel.

Result - Double click on a row to navigate to that appointment  Show All

Date	Resource	Symbol	Status	Time interval
13/11/2019	BERTA	H HEARING TEST	C	10:30-10:45
13/11/2019	CHARLIE	H HEARING TEST	C	10:30-10:45
06/11/2019	BERTA	S SURGERY	C	10:00-11:00
06/11/2019	CHARLIE	S SURGERY	C	10:00-11:00
08/10/2019	CHARLIE	I 1ST IF/ISSUE	C	12:15-13:00
24/04/2019	CHARLIE	I 1ST IF/ISSUE	D	12:30-13:15

- Double clicking an appointment will show that appointment in the Booking screen.

### 6.30.4 Many Earmoulds

This tab shows patients that have a minimum number of earmould visits over a date range.

- Enter the required date range. This can be done by entering a date in the **Date: from** and **to** fields or by right clicking on the fields and selecting a date from the calendar.
- The Minimum number of earmould visits can be set.
- Show result will display patients that have a number of earmould visits equal to or greater than the set number.

List of patients selected by params above (including number of earmoulds)

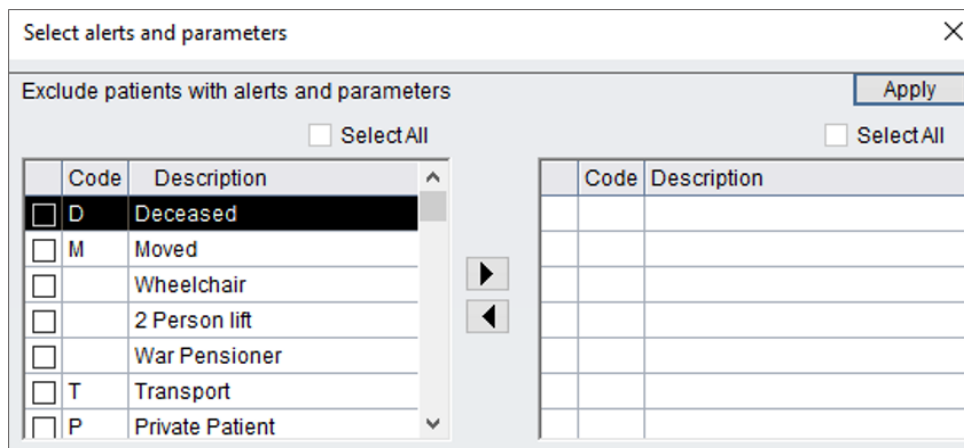
Hospital no.	NHS no.	Name	EMs total
0000001	111 111 1111	COLONEL CHARLIE HARPER	2

### 6.30.5 Missed Review Appointments

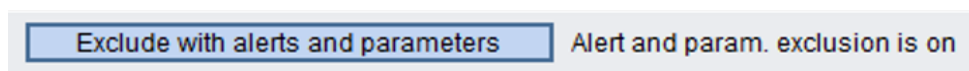
This tab will show patients that have attended an initial appointment but not the review or follow up appointment.

- Enter the required date range. This can be done by entering a date in the **Date: from** and **to** fields or by right clicking on the fields and selecting a date from the calendar.
- **Initial appointments types** can be selected by checking the box next to the appointment **Symbol**. The right facing arrow will move the symbol to the right-hand box which is used as the filter.
- The number of days after the initial appointment can be set using the **Review appointment must occur from, to days after the initial appt** fields. This can be set to a maximum of 999 days after the initial appointment.
- Review appointment types can be selected by checking the box next to the appointment **Symbol**. The right facing arrow will move the symbol to the right-hand box which is used as the filter.

- Patients that need to be excluded from the result due to their alert or parameter settings, can be excluded by selecting the **Exclude patients with alerts and parameters** button which will open a window where **Alerts** (with a Code) and **Parameters** (without a Code) can be selected.



- If an **Alert** or a **Parameter** has been selected, then the exclusion message is shown.



- Once **Show result** has been selected, a **List of patients selected by params above (Appts total not including Group Appts)** is shown in the window.
- By selecting one of these patients, the appointments for the selected patient is shown in the bottom window.

List of patients selected by params above (Appts total not including Group Appts)				Export
Hospital no.	NHS no.	Name	Appts. total	
0000020		MASTER ANGUS JONES	2	
0000022		Dr. LINDA HARRIS	1	
T121220		FRED	1	

- The **Export** button will open a window where the results can be saved as a CSV file so that it can be opened in Excel.

Result - Double click on a row to navigate to that appointment					<input type="checkbox"/> Show All
Date	Resource	Symbol	Status	Time interval	
13/11/2019	BERTA	H HEARING TEST	C	10:30-10:45	
13/11/2019	CHARLIE	H HEARING TEST	C	10:30-10:45	
06/11/2019	BERTA	S SURGERY	C	10:00-11:00	
06/11/2019	CHARLIE	S SURGERY	C	10:00-11:00	
08/10/2019	CHARLIE	I 1ST IF/ISSUE	C	12:15-13:00	
24/04/2019	CHARLIE	I 1ST IF/ISSUE	D	12:30-13:15	

- Double clicking an appointment will show that appointment in the Booking screen.

## 7 Referring agents

To open Referring agents go to **Navigation -> Referring agents**. You can also call this window from other modules where you select a referring agent, for instance Referral and Client information.

The system supports the following default referring agent types:

- Agency
- Audiologist
- General Practice (GP)
- An individual referring agent
- ENT (Ear- Nose- and Throat specialist)
- School
- Health visitor
- Onward referral
- Paediatrician
- SALT
- Other

More referring agent types can be defined by the System Administrator.

The screenshot shows a window titled "Referring agents" with a search bar and a table of agent information. The search bar includes fields for Postcode, GP Code, Practice Code, Type, CCG, CCG Code, and Name, along with radio buttons for "Surname" and "Part of full name". The table below lists various agents with columns for Type, CCG, Title, First Name, Surname/Name, Address, Postcode, and Information.

Type	CCG	Title	First	Surname/Name	Address	Postcode	Inform
General Pract	5QH	DR	M	AITCHISON	HILARY COTTAGE SURGERY, KEBLE LAWNS, F	PC:6373	
General Pract	5QF	DR	SN	ALBERT	BURDWOOD SURGERY, WHEELERS GREEN V	PC:8362	
Other				ALISON STAGG			
General Pract	5QE	DR	A	ALLEN	3 VALE AVENUE, WANTAGE, OXON	PC:6376	
General Pract	5555	DR	AL	ALLIK	123 STR, SOME CITY,	ABC 1234 CITY	
General Pract		DR	AD	AM	123 STR, HOME CITY		
Other				AMANDA CARROLL	MERCHISTON SURGERY, HIGHWORTH ROAD,	PC:3523	
Other				ANAESTHETIC CONSULTANT	TGW		
General Pract		CF		ANDERSON	MERCHISTON SURGERY, HIGHWORTH ROAD, SN3 4BF		
General Pract	5K3	DR	M	ANDREWS	ELM TREE SURGERY, 24A HIGH STREET, SHRI	PC:5392	
Health visitor				ANN SEYMOUR			
General Pract	5K3	DR	K	APPLEGATE	HAWTHORN MEDICAL CENTRE, MAY CLOSE, C	PC:6406	
General Pract	5K3	DR		ASH	KINGSWOOD SURGERY, KINGSWOOD AVENUE	PC:3336	
Other				ATTOTI	CONSULTANT PHYSICIAN, DOME		

Below the table, there is a summary of the selected agent's details:

- Address: 3 VALE AVENUE, WANTAGE, OXON
- Postcode: PC:6376
- City:
- CCG: OX CCG
- CCG code: 5QE
- Practice code: K84074

You can search for Referring agents by the following criteria:

- Postcode
- CCG (Clinical commissioning group) code
- CCG name
- GP code
- GP practice code
- Agent type
- Surname or part of full name

Your System Administrator can configure which field the cursor should default to for faster access to searching.

Your system administrator configures if the different referring agent types are an individual or an organisation.

By default, the system does not include outdated agents in the search result. To include outdated agents, check the corresponding box.

When you have specified the relevant search criteria, click on **Search**. Agents meeting the search criteria will be listed in the table.

You may also use the 'Word wheel' functionality to search, see the section on 'Sorting and saving listing screens'.

## 7.1 Edit or add a referring agent

- To add a new referring agent, click **New**. If you wish to edit a referring agent, highlight the referring agent and click **Edit**.

Edit referring agent
✕

Delete
OK
Close

---

Agent type  Individual

Title  Organization

First name

Last name

Full name

Address

Postcode

Phone number:

Fax number:

Email

Preferred comm. method

Information

General Practice

DR

A

ALLEN

DR AALLEN

3 VALE AVENUE  
WANTAGE  
OXON

PC:6376

olepus@auditdata.com

Site default (Only email, post if email is not avai

---

GP Code 3453544441

Practice Code K84074

CCG OX CCG

CCG Code 5QE  Outdated agent

External system id 5444

- Select an **Agent type**.
- Each agent can be either an **Individual** or an **Organization**. This is defined by selecting the corresponding option.
- If Individual is chosen, enter the title, first name or initials and last name in the appropriate fields, or enter the full name in the **Full name** field and use the **Decompose full name** to break it down according the name format in Auditbase Administration.

- **Compose full name** and **Decompose full name** allow names made suitable for addresses after they come from PAS and to be shown in different ways according to need, specifically as 'Dr A Adams' in addresses and as 'Adams A' when sorting in a list.
- To automatically fill in the full name with the information entered in the other fields, click on the **Compose full name** button.
- To extract the information from the full name field, click on the **Decompose full name** button. The system decomposes the full agent name as defined by the system administrator.
- An agent can be marked as **Outdated** by selecting the relevant check box. The system will not include this agent in search results unless required by the user.
- Enter an email address for the agent then from the drop-down list below this, select the agent's preferred method of receiving letters and documents
- Enter other relevant information for the agent, and click **OK** to save the Referring agent with the new or altered information.
- Depending on the settings in the System Administration tool, a referring agent can exist more than once at the same practice with different postcodes.
- Click **Delete** button to delete an agent from list.
- Click **Close** button to end the session with no action.

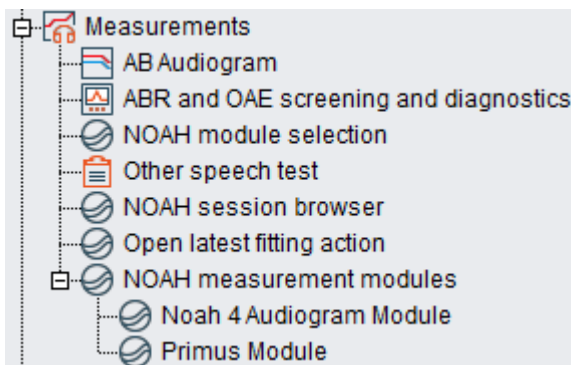
## 8 Measurements

Click the button below to access our training materials.

eLearning

The **Measurements** menu contains commands for accessing audiometry measurements:

- **AB Audiogram** starts a new audiometry measurement session. For more information refer to [Entering a pure tone audiogram](#)
- **ABR and OAE screening and diagnostics** opens a new window for entering ABR (Auditory Brainstem Response) and OAE (Otoacoustic Emissions) screening and diagnostic data. Please refer to the [ABR and OAE screening and diagnostics](#) topic for details.
- **Noah module selection** opens Noah4Auditbase, an Auditbase subsystem that interacts with Noah 4, and displays the list of Noah modules available. For more details on Noah4Auditbase, please refer to [Noah4Auditbase subsystem](#).
- **Noah session browser** opens the **Sessions and actions** panel of the Noah4Auditbase subsystem.
- **Open latest fitting action** to open the appropriate fitting module if installed.
- Shortcuts to installed measurement modules are also available if required, for instance **Aurical Audiogram**.



Auditbase stores audiograms by the **date entered by the user**, but Noah stores audiograms by the **date entered onto the system**. To avoid old audiograms being used by Noah, any audiograms entered into Auditbase with a date other than the current date will **not be linked into Noah**. This will prevent Noah pulling an outdated audiogram through to other modules. For further details please contact your local Auditdata support.

If an audiogram is saved in a Noah measurement module with a date before today, Auditbase will save this and it will be linked to Noah.

An audiogram saved from Noah Aud with a “Date of evaluation” in the past will be listed in the Auditbase Audiogram list with a text like this: “Transcription of 10/07/2006 Audiogram Data”. The date in the Auditbase audiogram list and the Noah session list will be the current date.

### Audiograms with historical dates

If an audiogram is saved from Auditbase with a past date, the text in the Auditbase Audiogram list will be **Audiogram not linked to Noah** (it is not available from the Noah environment). The date in the list of audiograms will be the past date.

Noah Audiogram formats 100, 200 and 500 can be read, depending on settings in the System Administration tool. Auditbase saves in 200 format, Auditbase cannot edit a 500 format even if saved by Noah Aud.

### Audiometer



The correct communication protocol is necessary to be able to configure audiometers. The correct protocol can be selected in System Administration. Core audiogram data made by a Noah module or panel cannot be edited in Auditbase except when created by the Noah Aud module in format 200. The following data can be updated:

- **Weber** – on the main audiogram graph and on the separate tab;
- Setting notes for thresholds using right click menu;
- **Information** (notes, ear drum status etc.).
  - If there was a note on a threshold, and users continue measurement and remove the threshold, the note must be removed too;
- **Referral**;
- **Vestibular**;
- **Speech in noise**;
- **Others;Surgery**;
- Symbols which can be added to the audiogram using **Import tymp**;
  - Simultaneous run of measurement and tymp is NOT needed.
  - Entering tympanometry data manually on the **Tymp** tab;
  - **Import tymp** data;
  - Tympanometry reflexes – it is possible to add these using the mouse as well as by using **Import tymp** and **Measure tymp**;
- Symbols which are allowed to be added to the audiogram include “Forehead bone measurements”. These symbols are not included in the public part of Noah. The list of symbols is included below:
  - Bone / Other / Unmasked Left;
  - Bone / Other / Unmasked Right;
  - Bone / Other / Unmasked Left Not reached;
  - Bone / Other / Unmasked Right Not reached;
- **Compare** tab


### Tympanometry data

New Tympanometry algorithm for extracting data from Noah.

## 8.1 ABR and OAE screening and diagnostics

- From the **Navigation** area, select **Measurements** -> **ABR and OAE screening and diagnostics**.
- To view and edit existing tests for the patient, choose a test from the drop-down list.
- Click on **New**, if you want to fill in a new test.
- You can edit the **Date** of test if needed.
- **Age at test** is calculated and fixed when saving.
- A special button is available for attaching the measurement to or detaching it from an appointment. The button has a picture which reflects the state of the measurement: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the measurement linking.

Date	Symbol	Description	Resource	Status
13/01/2020	∩	from1	Res46	*
13/01/2020	∩	2	Charlie	*
10/01/2020	E	PHAC new p	Charlie	*
10/01/2020	1	1	Charlie	*
09/01/2020	E	PHAC new p	Stassy	*
09/01/2020	1	1	Res54	*

- If the appointment is linked to a referral, then the **Referral stage**, where the appointment took place, will be shown here.
- **Test type** can be selected from the drop-down menu.
- **Machine** can be selected from the drop-down menu. This list will be defined by your System Administrator. Yes, No or N/A can be selected to show the In-patient status.
- **Transducer type** can be selected from the drop-down menu. **TDH** or **Insert phones** can be selected from the hard-coded options.
- **Protocol** can be selected from the drop-down menu.
- **Outcome** can be selected from the drop-down menu.
- The name of the **Screeener** can be shown by clicking on the  button and selecting either a user or a referring agent.
- Fill in the test and click **Save**.
- **Print** will send a copy of the report to the printer.

*Please note that everything is measured in dBnHL.*

ABR and OAE screening and diagnostics

Client: MR JOHN SMITH Print New Save Delete Close

Tests:  Created by: SYSTEM ADMINISTRATOR

Date of test: 10/01/2020 Age at test: 79y Referral stage: Not linked to appointment

Test type:  Screener:  Machine:  Transducer type:

In-patient: N/A Protocol:  Outcome:

	RIGHT				LEFT			
	<input type="text"/>	<input type="text"/>	OAE	TE/DP	<input type="text"/>	<input type="text"/>	OAE	TE/DP
Automated ABR	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Click ABR	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
0.5kHz Tone Pip	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
1kHz Tone Pip	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
2kHz Tone Pip	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
3kHz Tone Pip	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
4kHz Tone Pip	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
Bone conduction	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
Cochlear microphonics	<input type="text"/>	at	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	at	<input type="text"/>	<input type="text"/> dBnHL
0.5kHz CERA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
1kHz CERA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
2kHz CERA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
3kHz CERA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL
4kHz CERA	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> dBnHL

Hearing Screening responses and key referral info can be recorded and then audited with a set of Crystal Reports. These are found with other reports in **Navigation -> User Reports -> Hearing Screening** and include the following:

- In and Out Patients screened
- Number of screening sessions per patient
- Patients referred for diagnostic assessment
- Patients referred for targeted follow up
- Patients screened before some age
- Patients screened by particular screener
- Patients screened.

## 8.2 Entering a pure tone audiogram

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Navigation -> Measurements -> AB Audiogram**.
- If configured by system administrator, the system opens the last audiogram. Select **File -> New** to create a new audiogram.
- The audiogram can be shown in either split, single, large or custom format where custom has a default zoom size that can be varied under the Zoom menu. The default mode is defined by the system administrator. See [How to toggle between split, single, large or custom audiogram formats](#).
- Select the appropriate measurement symbol found in the centre of the screen for split mode or right part of the screen for large mode.
- Enter the audiogram by clicking on the required threshold point.
- Right-clicking on a point will bring up a window where you can change the status of the point to **Not Reached** etc.
- You can input information for right and left ear, comments to the measurements result and in general and choose an audiogram type that are set up by your system administrator.
  - The audiogram type can be set as a mandatory field for saving a record.
- Select the **Show in Viewer** checkbox if you want the audiogram to be accessible from the Auditbase Viewer.
- Select **File** menu, then **Save**.
  - After an audiogram is saved, the **Created date/time** field will be filled in automatically.
- Check date and **Audiologist (Made by)**, change if necessary.
- Click **OK**.

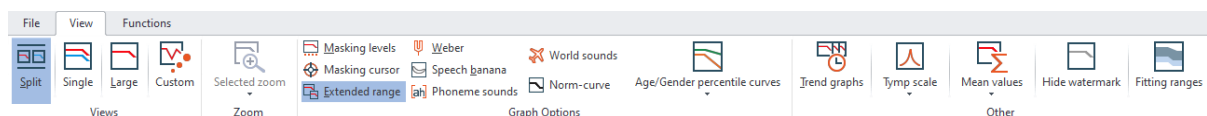
The screenshot displays the 'AB Audiogram' entry interface. At the top, the client is identified as 'T110025 MRS FIRSTNAME10025 LASTNAME10025' and the user as 'SYSTEM ADMINISTRATOR'. The interface is split into two main audiogram views. The left view shows a red line graph with data points at 250, 500, 1000, 2000, 4000, and 8000 Hz, with thresholds around 30-70 dB. The right view shows a blue line graph with data points at 250, 500, 1000, 2000, 4000, and 8000 Hz, with thresholds around 40-60 dB. A central 'Measure' menu is open, listing various symbols such as AC, AC NOT REACHED, UNCERTAIN, CROSSOVER, AC MASKED, BC UNMASKED, BC MASKED, UCL UM, MCL UM, SF, SF M, R IPSY, and R CONTRA. Below the plots, there are input fields for 'Audiogram type', 'Reliable', 'Watermark', 'Info', 'Audiometer no.', 'Created by', and 'Created date/time'. There are also 'Right' and 'Left' ear status sections with 'Mean values' and 'Eardrum status' options. At the bottom, there are tabs for 'Information', 'Referral', 'Speech', 'Speech in noise', 'Tympanometry', 'Compare', 'Graphical Speech', 'Others', 'Vestibular', and 'Surgery'.

If you enter audiograms via the device interface, the measuring points will automatically be transferred from the audiometer used for measuring.

- To enter the measurements via the device interface, select the menu item **Functions -> Measure** or click **Measure**.
- The button **Measure** turns yellow when active. Press **Measure** again to finish the measurement.

Measure	
NORMAL	▼
🔄 Symbol	👂
🔴 AC	✕
🔴 AC MASKED	✕
🔴 BC UNMASKED	🔵
🔴 NOT REACHED	🔵
🔴 UNCERTAIN	🔵
🔴 CROSSOVER	🔵
🔴 BC MASKED	🔵
🔴 UCL UM	🔵
🔴 UCL M	🔵
🔴 MCL UM	🔵
🔴 MCL M	🔵
🔴 SF	🔵
🔴 SF M	🔵
🔴 R IPSY	🔵
🔴 R IPSY M	🔵
🔴 R CONTRA	🔵

- When using the Primus audiometer with insert headphones, measurement symbols will be displayed using air conduction symbols. Right click on the curve to see if the audiogram was carried out using TDH or Insert transducers.
- If applicable, select the value for the Reliable flag: **Reliable**, **Unreliable** or **Blank**.
- If applicable, select the audiogram watermark. **Unreliable** and **Estimated** watermarks are available by default. Additional watermarks can be configured in the Administration tool. Selected watermark will display across the audiogram and appear on any printed copies. The watermark will not display on an audiogram in Noah. If showing the audiogram to a client and not wanting them to see the watermark, go the **View** tab and click **Hide watermark**.



- The Auditbase keeps the **Reliable** flag values and the **Watermark** values consistent. If you are setting the flag value or the watermark value to 'unreliable', the other value 'becomes' unreliable as well.

In addition to pure tone graphs, an audiogram can contain results of the following measurements as part of the audiogram:

- Speech measurements.
- Extended speech measurements in graphical representation.
- Vestibular measurements.
- Other measurements.

### 8.2.1 Saving Audiograms

- Once the audiogram has been completed, select **Save** from the File menu to store the audiogram.
- When saving an audiogram, a dialog with client's name, system date and signature of logged on Auditbase System user is presented.
- If you want to have a Noah representation of the audiogram, select the check box **Save audiogram in Noah**. This can be unchecked if you do not want to save to Noah. If the audiogram has been saved using **Measure**, this must be deactivated before **Save to Noah** can be unchecked. **Save audiogram in Noah** cannot be unchecked if a measurement with the Noah audiogram module launch protocol v1 is in progress but it can be unchecked for Protocol v1 and Protocol v2 measurements if the full screen mode was not used. These protocols are set by the System Administrator.
- If you want to sign the audiogram after saving it, select the check box **Sign audiogram now**.
- As default, Auditbase System will suggest the audiogram to be saved - and identified - by the system date which may be altered by right clicking in the **Date** field to open calendar. Change of signature - Auditbase System user - is done via  and selecting from list.
- If another staff member performs the client hearing level investigation, you can select this person as **Examined by** user on the **Information** tab. The system administrator defines whether this field is visible.
- When more audiograms are saved by the same date, they are numbered consecutively; DDMMYYYY1, DDMMYYYY2.
- There are no limits to the number of audiograms for a client.
- Click **OK** to save the audiogram with the suggested or changed parameters or press **Ctrl+S**.
- Retrieving saved audiograms from database is done via the File menu, **Open**.
- A dialog with lists of audiograms saved for a selected client is presented. The audiograms are displayed with audiogram name, date, no., whether or not it is signed, audiogram type and comments. A **Preview** option is also available. This will open the selected audiogram in a separate window so that it can be previewed before being opened.

- To retrieve the client's most recent audiogram without selecting in the list, select **File -> Open latest**, or press **Ctrl+L**.
- In the Administration tool, the system can be configured to open the client's most recent audiogram automatically.

## 8.2.2 Signing audiograms

You can sign an audiogram when you save the audiogram.

- This functionality can be switched on or off by the system administrator.
- You can also sign an existing audiogram from **Functions -> Sign audiogram**.
- You are reminded to link the Audiogram to an appointment when signing.
- Previously signed audiograms can be linked to an appointment if required.
- You can see whether an audiogram is signed, in the main window of the audiogram, in the Open audiogram dialog and in the Noah browser.

**Note:** *If you sign an audiogram, the audiogram cannot be edited.*

*If a signed audiogram is edited or deleted in Noah, the link to the Auditbase audiogram will be broken.*

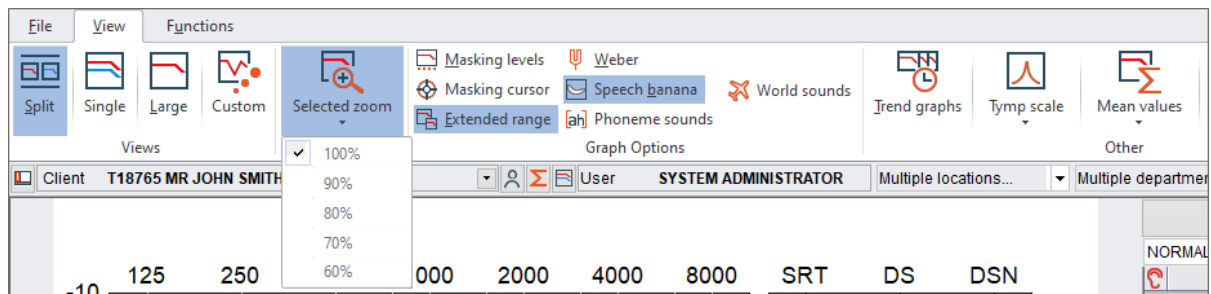
## 8.2.3 Deleting audiograms

Deleting an Auditbase audiogram can be done from the Functions menu but only by a user that has been granted the extended user right **Delete Audiogram or linked Noah audiogram** by the System Administrator. By selecting the **Delete audiogram** button, a window opens and the audiogram can be chosen from the list and Delete can be used to delete the audiogram. Close will close the window without deleting an audiogram.

Another button on the **Functions** ribbon to **Delete linked Noah audiogram** will delete the Noah action associated with the selected audiogram, but this is an extended user right that must be granted by the System Administrator. This action will be refused if a Noah fitting is based on Noah action.

## 8.3 How to toggle between split, single, large or custom audiogram formats

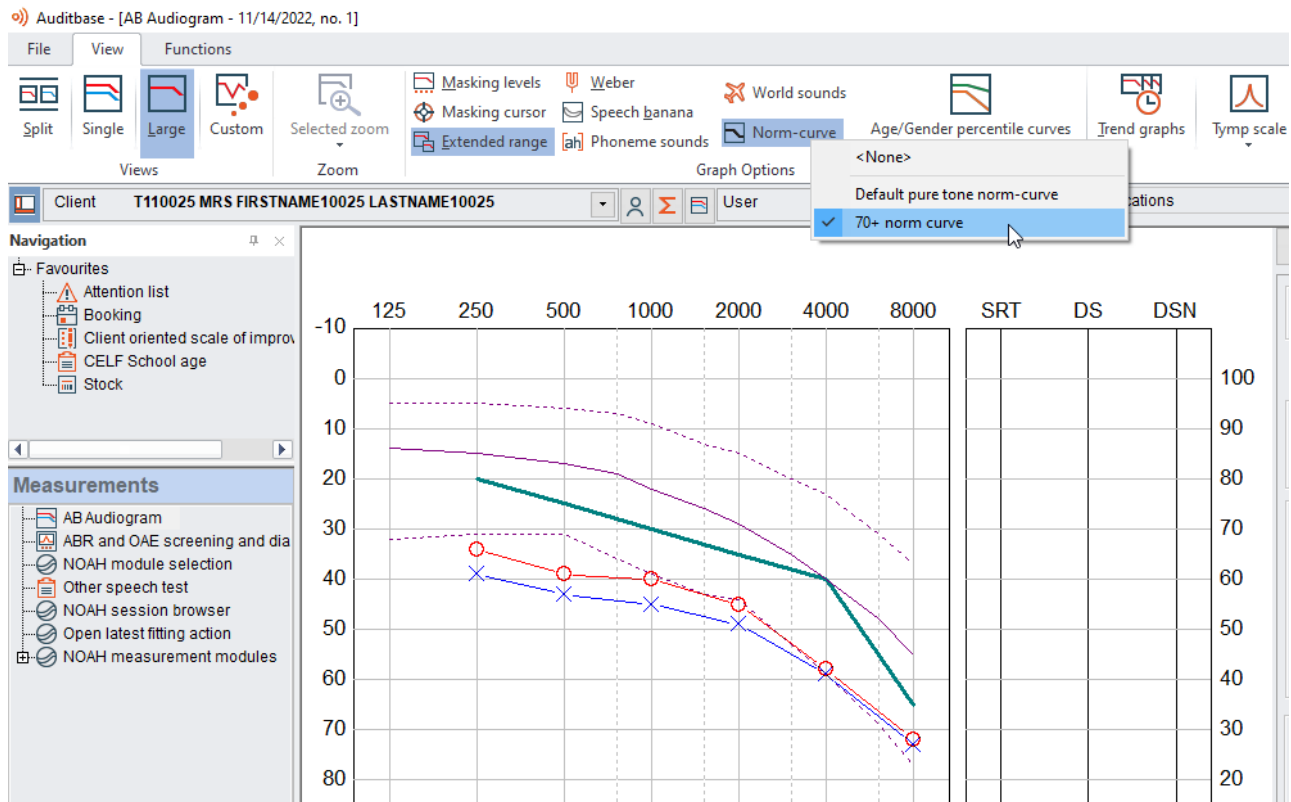
- In the audiogram screen, select **View** -> **Split audiogram**, **Single audiogram**, **Large audiogram** or **Custom audiogram** as required.



- **Custom audiogram** has a default zoom size that can be varied from the **Zoom** menu, which is only available when **Custom** is the selected view. The percentage of zoom refers to the audiogram only and is based on how large the audiogram would look on a 1024x768 screen resolution. It defaults to the zoom level set by your system administrator. This view is intended particularly for working with a device interface.

## 8.4 Other view options

In the **View** ribbon choose to display Masking levels, Masking cursor, extended range up to 140dB, Speech banana, phoneme sounds and world sounds. The content of the latter two can be configured by your system administrator who also can set up if the Masking cursor should be turned on by default.



Audiogram static norm curves can also be shown from the View menu. Such curves are defined in Auditbase Administration: a specific curve can be selected for a specific workstation to be displayed as default. All available norm curves are listed in the **Norm-curve** pop-up. You can switch between them as required.

Based on data from ISO 7029 users can now display age and gender specific dynamic hearing loss distribution percentile curves. The percentile value used can be chosen in Auditbase Administration on a site level. The curves can be enabled or disabled on a Workstation level in Administration.

Special considerations:

- If the patient has no DoB (date of birth) or the age is out of range of the IS 7029 standard there will be no percentile curves. Curves are generated for ages 18-80.
- If the patient gender is not set to 'Male' or 'Female', there can be no curve generated since there is no ISO 7029 data.
- If the clinician wishes, they can override the automated gender-based curves and view curves from the ISO standard for another gender for a particular patient's audiograms.

- If the clinician wishes, they can turn off the curves during review of a particular patient's audiograms.

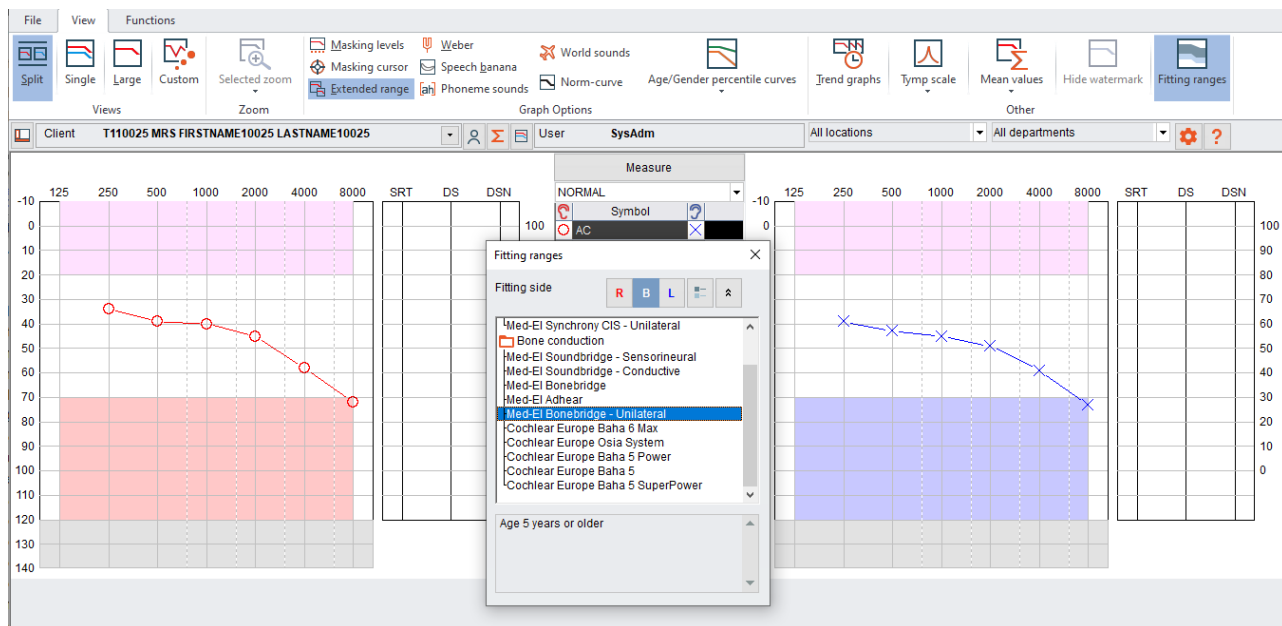
### 8.4.1 Fitting ranges

On clicking the **Fitting ranges** button, the floating dialog appears with a list of manufacturers' devices. Each device has a configured fitting range that can be applied to the audiogram to see if that device is suitable for the selected patient. At the bottom of the dialog, users can view additional information which may be helpful when working with a particular device (e.g., *age restrictions*).

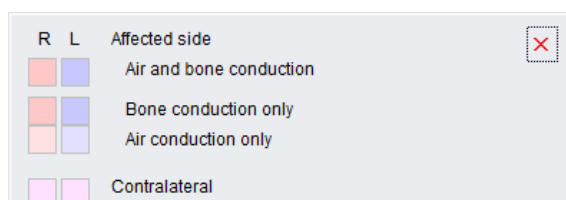
It is possible to keep the dialog open and use the corresponding fitting range as reference when looking through different audiograms of the same patient or when switching between patients. Arrow keys can be used to move up and down the fitting ranges.

Fitting ranges configured as groups in the Administration tool are organised as folders in Auditbase. Clicking into the folder, opens it up displaying the items in that group.

You can select the fitting side (**Right**, **Left** or **Both**). In split mode, the range for the affected ear and the opposite ear is distributed between two graphs. In single view, the colours for the affected and the opposite ear are shown on the same graph.

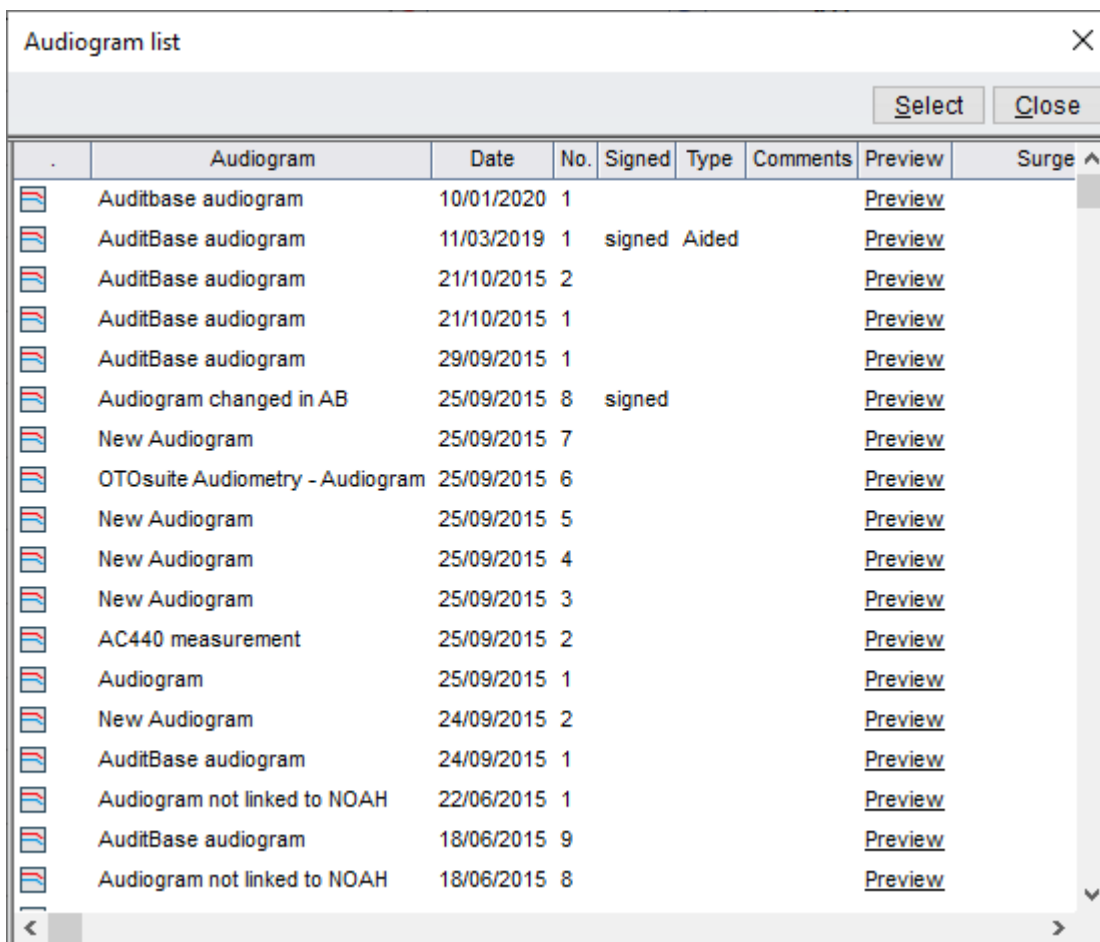


The dialog can be resized to best fit your screen. It can also be collapsed when needed by using the collapse control (⌵). To view available range colours, click [icon].



## 8.5 How to view previous audiograms

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation -> Measurements -> AB Audiogram.**
- Select **File -> Open.**
- The audiograms are displayed with audiogram name, date, no., whether or not it is signed, audiogram type and comments.
  - The audiogram list is a configurable list where column position width and multiple sort order can be saved for the logged-on user or for a site when saved by the SYSADM user.
  - The **Audiogram list** is resizable by dragging any of the four borders to the required size.
- Make the changes you wish to the table and right-click anywhere in the table.
- Select **Save user view.**
- Click on the audiogram to be viewed.
- Click **Select**. Alternatively, click on the required audiogram and it will be selected in the background module. Double clicking an audiogram will select it and close the window automatically.



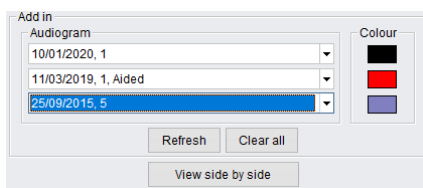
	Audiogram	Date	No.	Signed	Type	Comments	Preview	Surge ^
	Auditbase audiogram	10/01/2020	1				<a href="#">Preview</a>	
	AuditBase audiogram	11/03/2019	1	signed	Aided		<a href="#">Preview</a>	
	AuditBase audiogram	21/10/2015	2				<a href="#">Preview</a>	
	AuditBase audiogram	21/10/2015	1				<a href="#">Preview</a>	
	AuditBase audiogram	29/09/2015	1				<a href="#">Preview</a>	
	Audiogram changed in AB	25/09/2015	8	signed			<a href="#">Preview</a>	
	New Audiogram	25/09/2015	7				<a href="#">Preview</a>	
	OTOSuite Audiometry - Audiogram	25/09/2015	6				<a href="#">Preview</a>	
	New Audiogram	25/09/2015	5				<a href="#">Preview</a>	
	New Audiogram	25/09/2015	4				<a href="#">Preview</a>	
	New Audiogram	25/09/2015	3				<a href="#">Preview</a>	
	AC440 measurement	25/09/2015	2				<a href="#">Preview</a>	
	Audiogram	25/09/2015	1				<a href="#">Preview</a>	
	New Audiogram	24/09/2015	2				<a href="#">Preview</a>	
	AuditBase audiogram	24/09/2015	1				<a href="#">Preview</a>	
	Audiogram not linked to NOAH	22/06/2015	1				<a href="#">Preview</a>	
	AuditBase audiogram	18/06/2015	9				<a href="#">Preview</a>	
	Audiogram not linked to NOAH	18/06/2015	8				<a href="#">Preview</a>	



## 8.6 Viewing more than one audiogram at a time in the same graph

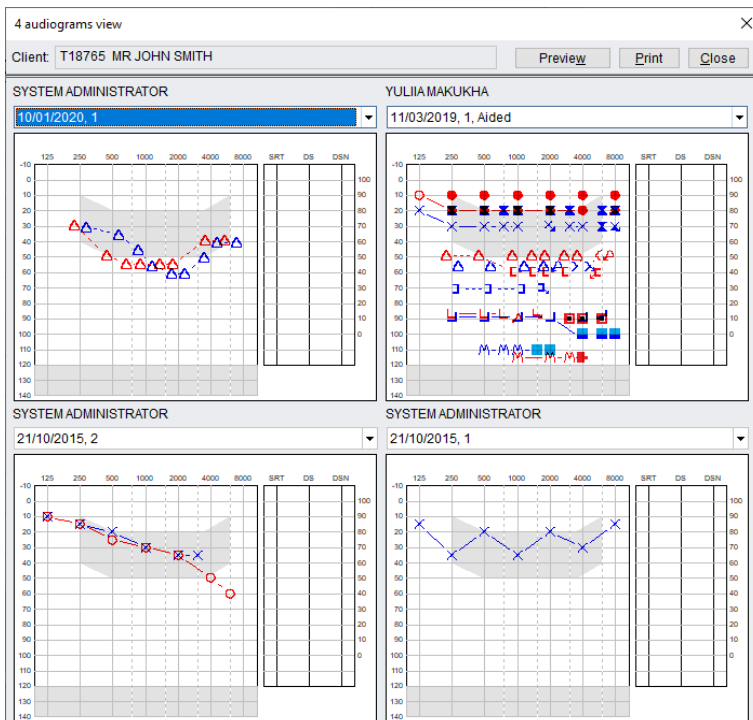
To view up to 4 audiograms superimposed on top of each other.

- From the audiogram screen, select **File -> Open**.
- Select the first audiogram to be viewed and click **OK**.
- Select the **Compare** tab.
- Select up to 3 audiograms from the drop-down lists which display the audiogram date, number and type.
- Click on each colour box and choose the colour required by clicking on it.
- Click **Refresh** to display the selected audiograms.
- To close the screen and return to the original audiogram, click **Clear all**.



To view up to 4 audiograms side by side:

- With the **Compare** tab active, click **View side by side**.
- Select an audiogram in the drop-down list for each of the 4 audiograms. The last 4 of the client's audiograms are pre-selected by default.
- Click **Preview** or **Print** as required.



## 8.7 Adding notes and comments to an audiogram

To add comments to an audiogram:

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation -> Measurements -> AB Audiogram.**
- Select **File -> Open** or add an audiogram.
- On **Information** tab, select **Edit** or **Alt+R**.
- A **Comments** window opens. Comments can be added to the audiogram and they will be displayed when printed.
- **OK** to save the comments.

To add a note to an audiogram:

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Measurements -> AB Audiogram.**
- Select **File -> Open** or add an audiogram.
- Right click on the threshold you wish to add a note to.
- One of the options is **Set note**.
- Select from the drop-down list which note is to be added. These notes are defined by your System Administrator.

## 8.8 Tympanometric tab

Discrete tympanograms and reflex thresholds can be entered for the Tympanometric measurement or data can be transferred directly from: the Zodiac 901 connected to a COM port or from Noah sessions created by any module using the Noah Tymp 100, 500 or 501 data format, e.g. Otoflex module, Otowave, Titan, GSI Suite, Capella module or the Zodilink module. Data from any module that stores tympanometry in the standard Noah 100 or 500 format can be measured or imported see below.

One of the 3 tymp curves imported from Noah sessions or direct from Zodiac can be set as default for printing and Audiological Summary Reports. If none is set, the system will default to the highest number of curve sets available.

Since no Noah standard exists for Tympanometric data no other Noah modules can be used unless the manufacturers work with Auditdata to define a standard protocol.

*Import of data can only be done when not in an audiogram measurement mode.*

- Use **Measure** button to open the Tymp module configured in Administration which will automatically import into Auditbase on saving.
- Use the button **Import tymp** to import data from the instrument or a Noah session. Up to three tymp curve sets can be represented. Choose between curves in the drop-down box **Selected curve**.
- The date of the measurement can be changed manually when importing from a Noah session.
- If reflex thresholds have been measured, these thresholds will be drawn as thresholds in the pure tone audiogram.
- The scale factor for the tymp curves is read from the default setting in **Administration settings -> Workstation -> Audiogram**. To overrule this default setting, select **View -> Tymp scale**. The scaling is reset to default when selecting a new audiogram or a new client.
- You can print the pure tone audiogram and tymp information in one report. Select **File -> Print** and choose **Audiological Datasheet**. Either split or binaural audiograms can be printed.
- Imported tymp data can be reset in **Functions -> Reset tymp data**. Reset option is available to senior users (clinical staff) who were granted this right via Auditbase administration.

*Note: It is not possible to create reflex thresholds with the Capella module.*

When importing data directly from the Zodiac instrument the Zodiac should be connected to the PC via a COM port.

The following parameters will be imported along with the tympanograms if they are available:

- ECV = Ear Canal Volume: volume unit
- SC = Static Compliance (mmho)
- MEP = Middle Ear Pressure (daPa)
- Gradient: (daPa)
- Tymp Width = Tympanometric Width: daPa
- Frequency (Hz)
- Type = A, Ad, As, B, C, D, (E)

**Detailed information on the interpretation of impedance data in Auditbase.**

Reflex thresholds imported to Auditbase.

The reflex thresholds that are imported directly from the Zodiac or from a Noah session created by Otoflex, Capella or Zodilink are all interpreted using the following algorithm:

Example: Zodiac, 500 Hz stimulus, Ipsilateral:

Intensity dB HL	70	75	80	85	90
Actual deflection mmho or ml/cc/cm3	-0.01	0.45	-0.01	-0.03	-0.08
Reflex result bit	False	True	False	True	True

Example: ODS/Otoflex, 500 Hz stimulus, Ipsilateral:

Intensity dB HL	70	75	80	85	90
Actual deflection mmho or ml/cc/cm3	-0.01	0.45	-0.01	-0.03	-0.08
Reflex result bit	False	False	False	True	False

The way to identify the threshold value is:

If there is one and only one curve with both test Type = 'reflex' (i.e. manually measured) and the result bit set, this is taken as a manual indication of the threshold and is thus considered the final result. The procedure then ends here.

Otherwise:

Search all curves of test Type = 'reflex' or 'autoThresholdSearch' (can be mixed) from the highest stimulus intensity presented and downwards for the lowest intensity curve with an absolute positive or negative deflection value  $\geq 0.02$  or the result bit set, i.e. the last in the search direction that is not preceded by another curve fulfilling this criterion.

Now change search direction to increasing intensities and search for the first curve that has the result bit set. If a curve is found with the bit set, this curve (stimulus intensity) represents the threshold. If no curve is found with the bit set, the result must be indicated as 'no threshold'

found at xxx dB HL' where xxx is the highest stimulus intensity that was presented, i.e. the highest intensity recorded in the curves.

This procedure will identify 85 dB HL as the threshold in both examples above. Note that 75 dB would not be considered a threshold in the Zodiac example even if the result bits for 85 and 90 dB were not set as the downward search would still stop at 85 dB.

### Imported tympanograms

The tympanograms that are imported directly from the Zodiac or from a Noah session created by Otoflex, Capella or Zodilink are all interpreted in the following way:

The tymp curve is displayed using the unit from Noah. However, if a volume unit is indicated in Noah and the probe tone used is not 226 Hz, the tymp curve (every point of the curve) is recalculated as:

Actual tymp = Noah\_tymp \* probetone / 226  
and the actual unit is mmho.

Tymp baseline compensation:

Where a Noah Tymp module requires it, curve compensation can be applied even when it is declared as already applied in the measurement.

The tymp curves are displayed baseline compensated when possible.

The curve may have been stored baseline compensated in Noah (recordMode=Compensated').

If the curve was stored 'non Compensated', the ear canal volume \* probetone / 226 is subtracted from the curve (every point of the curve) values to calculate the baseline compensated curve. If the ear canal volume is undefined, the curve is displayed as non-compensated.

Tymp ID can be edited manually when a tympanogram is imported from Noah or measured in Auditbase, to make it possible to record the Tympanometer details when using different tympanometers in the same room.

If several tymps are present and must be displayed together, all of them will be displayed as non-compensated if one or more of them cannot be displayed compensated (if stored non-compensated and the ear canal volume is undefined). Measurements at different frequencies are grouped according to frequency on the same ear.

The parameters belonging to the tympanograms are determined in the following way.

### Derived parameters:

The height of the peak from the baseline is denoted either Static Compliance (SC) or Static Admittance (SA). The term SA is used for all cases except for 226 Hz tympanograms with a volume unit (ml, cc, cm<sup>3</sup>).  $SA (= SC) = \text{maxCompl} - \text{canalVolume} * \text{probetone} / 226$

TPP = Tympanometric Peak Pressure

TW = Tympanometric Width: daPa

Gradient: mmho/daPa or volume\_unit/daPa

ECV = Ear Canal Volume

Type = A, Ad, As, B, C, D, (E)

## 8.9 Tabbed pages for other types of measurements

In addition to pure tone measurements, you can register, store and print a variety of other data.

The following data may be processed:

- For speech measurement results, select the **Speech** or **Speech in noise** tab.
- For tympanometry results, select the **Tymp** tab.
- For speech measurement results in extended graphical form, select the **Graphical speech** tab.
- For Bing, Rinne, Jelly and Weber measurement results, select the **Others** tab.
- For vestibular measurement results, select the **Vestibular** tab.



Once a tab has been selected, changing the audiogram or client will not change the selected tab. When Auditbase is re-started, the default tab is selected. If information has been stored on any of the tabs, a green circle will indicate this.

*NOTE: the number of tabs to appear in the Audiogram module can be configured by the System Administrator. Any tab (except 'Information') can be set to be hidden from view.*

### Information tab

The Information tab is for storing general data for each measurement; for instance, notes, comments, audiometer number.

Notes can be added to a particular threshold by selecting the threshold, right-clicking and choosing Set note. These notes are defined by the system administrator and will appear on the audiogram when it is printed.

Comments can be added to an audiogram by selecting the Edit button and inserting free text notes. These are displayed on the audiogram when it is printed out.

Mean values, calculated for Air and Bone conduction as the average of frequencies defined by the system administrator, for instance 500, 1000 and 2000 Hz thresholds.

### Referral tab

The Referral tab is for storing data about a referral, referring agent, and observations or procedures. The appointment which the Audiogram is related to is shown here and can be changed by using the Attach and Detach buttons. The referral in which the appointment takes part is also shown.

### Speech tab

The Speech tab is for storing numerical speech audiograms, including, SRT, UCL, recognition percentages and masking levels. The following results can be entered:

- Type of measurement. Select from the drop-down list between Normal, Aided, Tube, Noise or Insert phone.
- SRT (Speech Recognition Threshold).
- Mask. (Masking level). For masked speech recognition measurement.
- UCL (Uncomfortable level).
- Max recognition 1, 2, and 3: For each type of measurement, Recognition %, dB level and masking level can be entered.

You can choose to display the speech measurement results graphically as an extension of the pure tone audiogram. The system administrator configures this extension and its content.

The values displayed in the speech extension are the following:

- TC (Mean value of pure tone measurement)
- SRT (Speech Recognition Threshold)
- DS (Discrimination Score) or DL (Discrimination Loss). Max recognition 1 is shown as DS or DL.
- DSN or DLN (Discrimination Score in Noise or Discrimination Loss in Noise). Max recognition 2 is shown as DSN or DLN.
- DS, DL, DSN and DLN are treated as masked when a corresponding masking level is specified. The following symbols are used to show values in the speech extension graph:
- For TC: air normal unmasked
- For DS and DL: air normal unmasked or masked
- For DSN and DLN: sound field normal unmasked or masked
- For DS, DSN, DL and DLN: free-field aided masked and unmasked.

*Note: Masking is not used for SRT*

For both pure tone measurement and speech extension the results of speech measurement can be obtained using the Aurical module.

The data entered in the **Speech** tab is part of the audiogram and can be saved with the entire audiogram.

### Speech in noise

Under **Speech in noise** you can register measurements of speech tests in noise with headsets.

Right					Base calculation of Expected result and High frequency mean 10/01/2020, 1				
	Result, %	Level, dB	Masking, dB	Expected, %		Result, %	Level, dB	Masking, dB	Expected, %
Test 1	= 23	50			Test 1	= 12	60		
Test 2	=				Test 2	=			
PTA4		High frequency mean value			PTA4		High frequency mean value		
Comment					Comment				

First choose which audiogram to base the expected result and the high frequency mean value on. Choose the current audiogram or a previous one.

The values from the selected audiogram will be stored under **PTA4** and **High frequency mean value**.

You can make two tests, where you register the result in percentage, the level in dB and the masking in dB. If you perform the test with an audiometer with control panel for Auditbase, the result fields will be populated automatically. Your System Administrator can set the system up to do this.

Use the drop-down list to qualify the result by either choosing the equal to sign (certain of the test's accurateness), the less than sign (the result is probably not accurate) or the more than sign (the result is probably not accurate).

The Expected result is calculated based on the test results and the PTA4 and High frequency mean value numbers.

## Compare

The Compare tab is for viewing previous audiograms simultaneously, either together on the main screen or side-by-side on the screen that opens when pressing 'View side-by-side'.

## Graphical Speech tab

Extended results of speech measurements can be registered in the form of a graphical speech audiogram in the **Graphical Speech** tab.

- As for pure tone audiograms, a symbol must be selected.
- The symbols for the following speech measurement types are defined by the system administrator, by default different symbols are set up according to country. The default can be selected and then the default mappings will be used when the word list is blank from the Noah module or when there is no mapping for the specific word list being used.
  - single phoneme
  - double phoneme
  - triple phoneme
  - three-digit words
- Additionally, different symbols can be defined for the following measurement conditions:
  - normal
  - aided
  - free-field
  - binaural
- Different symbols can also be defined for masked and unmasked measurements.
- The condition is selected in the drop-down list above the symbols list.

- The symbols can be placed into the required position (determined by dB level and recognition percentage) on the left or right ear graph by clicking.
- **Show norm-curves** will, if ticked, overlay the graphs with norm-curves. Up to 3 norm-curves can be shown on each graph. The norm-curves are defined and selected in the System Administration tool.
- **Comments** can be added to a Speech Audiogram. Selecting the right button below the Symbol table will open a window where comments can be added. **OK** will save the comment; **Cancel** will close the window without saving the comments. Once the comment has been saved, hovering the mouse over the **Comments** button will show a tool tip with the comment displayed.
- To see more details and edit it more precise, you can get an enlarged speech audiogram by clicking the left button below the symbol table.
- The graphs on the **Graphical speech** tab will be updated when you **Close** the window.
- As for pure tone measurement, the results of the speech measurements can be obtained using the Aurical module. The Max. discrim. 1 and Max. discrim. 2 measurement types in Aurical are treated as single-phoneme and double-phoneme by Auditbase. To register results of other measurements, the symbol must be defined in Auditbase first.
- Data entered in the Graphical Speech tab is part of an audiogram and saved with the entire audiogram.
- To print a graphical speech audiogram, select the **File -> Print audiogram** menu item and select one of the options for printing the graphical speech data in the **Print audiogram window**.
- If using the Primus audiometer and your System Administrator has carried out the necessary setup in administration, the graphical speech test curves will appear in AB audiogram on the Graphical speech tab. If Graphical speech is not licensed then the results will still show but only on the Speech tab as summary totals.
- Using the button on the ribbon users can override the Site and Workstation options for import Graphical Speech from Otosuite Module full screen into either Graphical Speech tab or numerical Speech tab.

*NOTE: Auditbase Audiogram module does not handle binaural speech thresholds coming from Noah.*

## Others tab

Results of **Bing, Jelly, Rinne** and **Weber** measurements can be registered in the **Others** tab.

All **Bing, Jelly, Rinne** results are entered as blank, +, -, **F+**, **F-** for both right and left ear.

- + Positive
- - Negative
- F+ False Positive
- F- False Negative

To change the value, click in the corresponding field to see the next possible value.

The **Weber** result is entered in the same way. The possible values are:  
Not measured (blank), R (Right), L (Left), C (Centred), Uncertain, Not reached.

The values are represented by the Weber audiogram symbols defined by the system administrator.

Data entered in the **Others** tab is part of an audiogram and saved with the entire audiogram. The **Bing, Jelly, Rinne** and **Weber** results are printed on the **4 Audiograms** printout.

### Vestibular tab

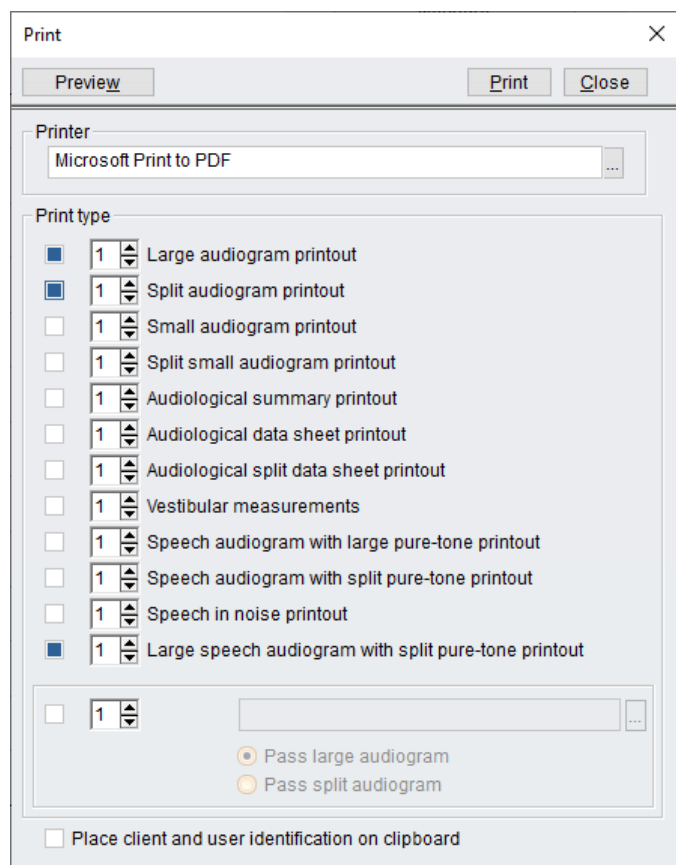
Results of vestibular measurements can be registered in the **Vestibular** tab.

The following data can be entered:

- The name of the audiologist performing the measurements: Select the from drop-down list of registered Auditbase users.
- Were goggles used: Select **Yes** or **No**.
- **Spontaneous nystagmus** and **Positional nystagmus** characteristics: Enter text up to 250 characters.
- For both left and right eye, reaction time in seconds for either 30 degrees or 44 degrees: Enter values from 0 through 240 manually or use the slider.
- **Comments**: Enter text up to 250 characters.
- Data entered in the **Vestibular** tab is part of an audiogram and saved with the entire audiogram.
- The results of vestibular measurements can be printed by selecting the menu item **File -> Print audiogram**. Select the Vestibular measurements option in the **Print audiogram window**.

## 8.10 Printing an audiogram

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Measurements** -> **AB Audiogram**.
- Select **File** -> **Open**.
- Select the required audiogram and highlight it.
- Select **File** -> **Print Audiogram**.
- Choose the required formats by checkmark and the amount of copies and click **Print**.
- Or, click **Preview** to preview printout on the screen before sending to printer.

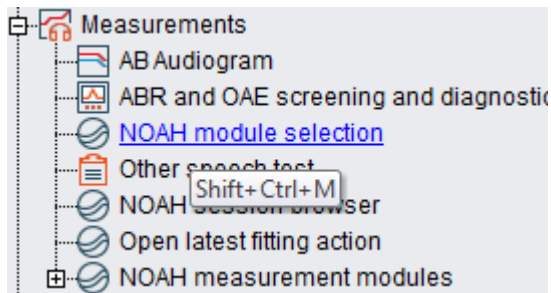


If the box labelled **Place client and user identification in clipboard** is checked then when printing to a PDF printer, the Audiogram date, username and client Primary code are saved to the clipboard. If the report is to be saved electronically using a PDF printer, rather than printing to paper, the clipboard can be pasted into the 'Save' dialog generated by the PDF printer to provide a descriptive filename when saving.

This check is maintained for the user for subsequent logins until unchecked.

## 8.11 How to enter into Noah

Noah can be entered from **Navigation** -> **Measurements** menu or from the [Client Pathway Overview](#).



When the client is specified, go to the Auditbase **Measurements** menu and do either one of the following:

- Click **Noah module selection** to open Noah with the **Modules** panel expanded.
- Click **Noah session browser** to open Noah with the **Sessions and actions** panel of expanded to view a list of the client's previous Noah sessions.
- Click **Open latest fitting action** to open the most recent fitting **action** if the fitting module is installed.
- Click the links at the bottom of the menu representing any installed measurement module to open that module.
- On slower PCs Auditbase may be logged in before Noah is fully running and usable. In this case you will receive an information message and should wait a few more seconds.

## 8.12 Using Noah

In Noah, there are three sections: **Client details**, **Modules** and **Sessions and actions**.

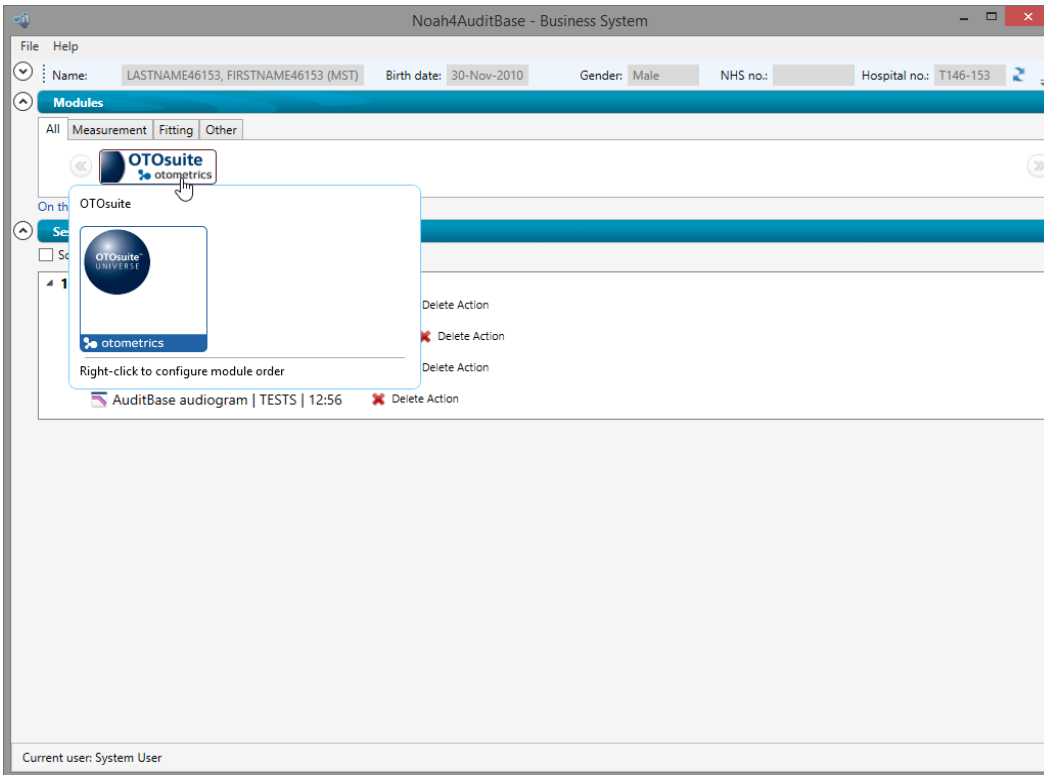
The basic client identifying information is shown at the top of the Noah4Auditbase window. To view additional client information within the Noah4Auditbase subsystem, click the button (⌵) beside the title of the **Client details** panel. This will show the client's address and create date and user.

*Note: By default, client details for sites in UK are displayed to follow NHS CUI requirements which assume applying a number of rules and formatting options; client details for sites outside UK are displayed by default without meeting NHS requirements. This setting is configurable with the System Administration tool for any country.*

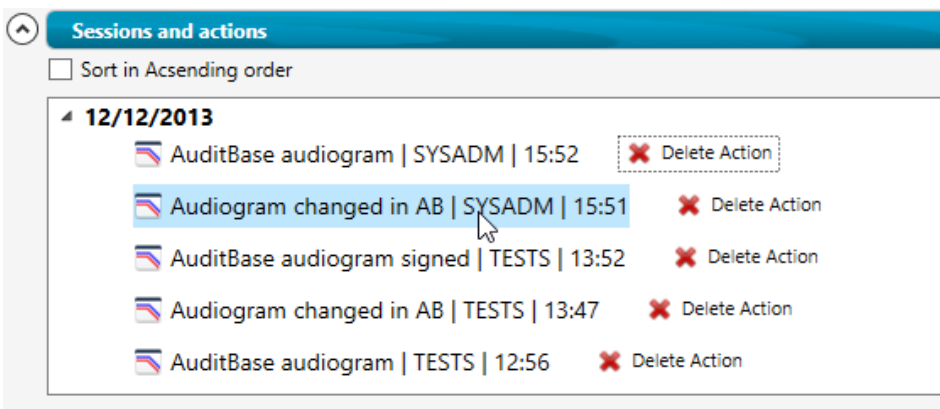
In the **Modules** panel of Noah4Auditbase the following commands are available:

- Click the corresponding module in the module list to start a new fitting or measurement session.
- To customize your Module order right-click the module list and choose **Arrange Module Order** to open the **Module Bar Configuration** dialogue box. This order is saved per user into the database so will be available from any workstation.
- On the corresponding tab, view the Noah modules of the following types if available:
  - All modules
  - Measurement modules

- Fitting modules
- Other modules
- Any Noah module opens in a separate window and is represented by a button in the Windows taskbar.
- If you want to open a Noah module when another one is running, you must return to the Noah4Auditbase window and click the corresponding item on the **Modules** panel.
- All Noah modules opened under Windows 7 are grouped under a single taskbar button. Click this taskbar button to open a menu listing all the Noah modules running.



Select the **Sort in Ascending** order checkbox above the session list to switch to the ascending ordering of sessions. BSA shadow masking symbols are not included in the Noah standard: therefore, they will not be transferred to Auditbase on saving the audiogram in Noah.



**Be aware:** BSA shadow masking symbols are now included in the Noah standard 502: therefore, they will only be transferred to and from Auditbase on saving the audiogram in Noah if the module supports this.

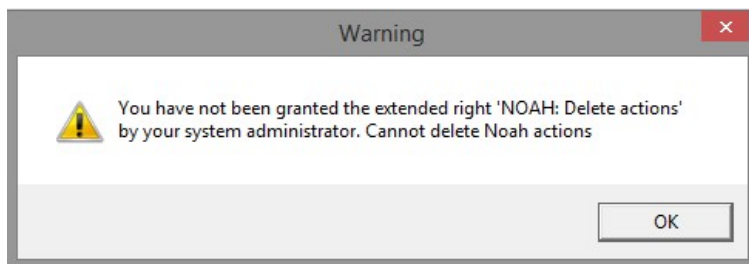
For the Serial number issue from Noah dialog see [Section 12.4](#).

On the **Sessions and actions** panel of Noah4Auditbase you can view a list of clients' previous Noah sessions. The following commands are available on the **Sessions and actions** panel:

- Click on the arrow or plus icon (depending on Windows version) to the left of the session date to view the actions. Referenced actions such as the audiogram a fitting is based on are nested underneath.
- Click any action to open it with the corresponding module if installed.
- Click the **Delete Action** button to the right of the action description to delete it.
- Noah alerts can be opened from the Noah Session Browser.
- The audiogram that a fitting session is based on can be opened from that fitting session in the Session Browser.

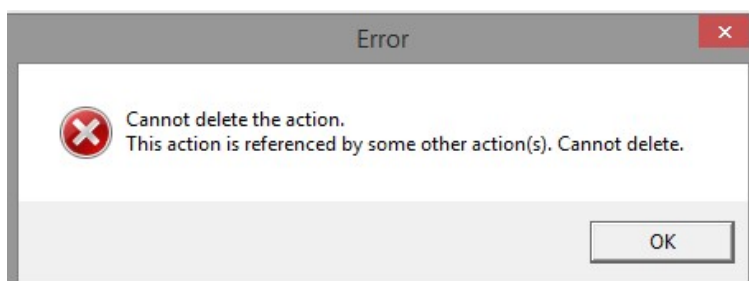
### 8.12.1 Deleting Noah actions

If you do not have the correct extended right issued, you will see an error message like the following:



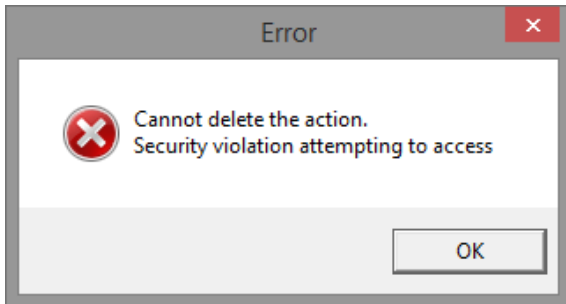
In this case, contact your System Administrator to grant extended rights for deleting Noah actions.

If an attempt is made to delete an audiogram that has a later fitting based on it, a message will appear denying deletion of the action.



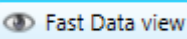
**Note:** If you don't have will need both an extended user right and a specific table right rights to delete Noah actions. When the extended right is assigned the table rights are automatically set, but table 'delete' rights could erroneously be removed later. If you do not have the correct table right issued, an error occurs within Noah which cannot be caught by Auditbase and processed correctly.

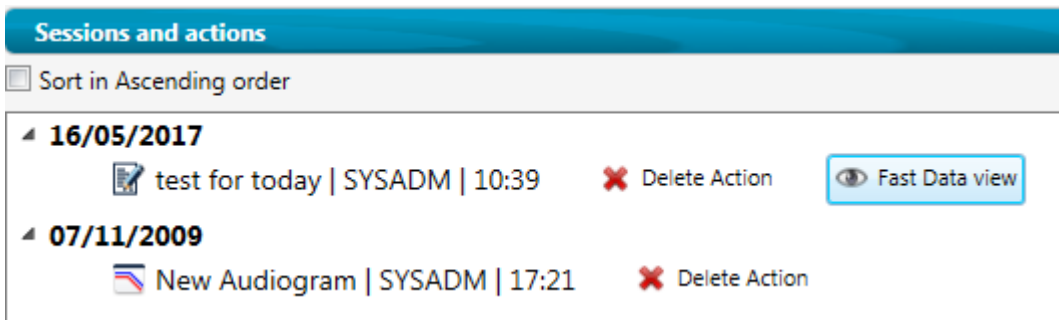
Therefore, you will see an error message from Noah like the following:



In this case, contact your System Administrator to reassign the extended right grant table rights for deleting Noah actions which will correct this.

### 8.12.2 Fast Data View


If the Noah module supports it, a summary of the Noah action can be shown in a pop-up image or PDF by clicking on the  icon. The icon will only appear if the module supports Fast Data View. A local copy of this image or document will be created and you must close the preview of the image or document for Auditbase to delete it. If you do not close the image or document, it will remain open when changing patient and could lead to confusion.




**WARNING:** Do not forget to close the Fast Data View document manually since Auditbase cannot close it automatically.

Be careful with patient content, Auditbase cannot warn users that a Fast Data View document is still opened for a client when users select a second client.

### 8.12.3 Noah alerts Dashboard

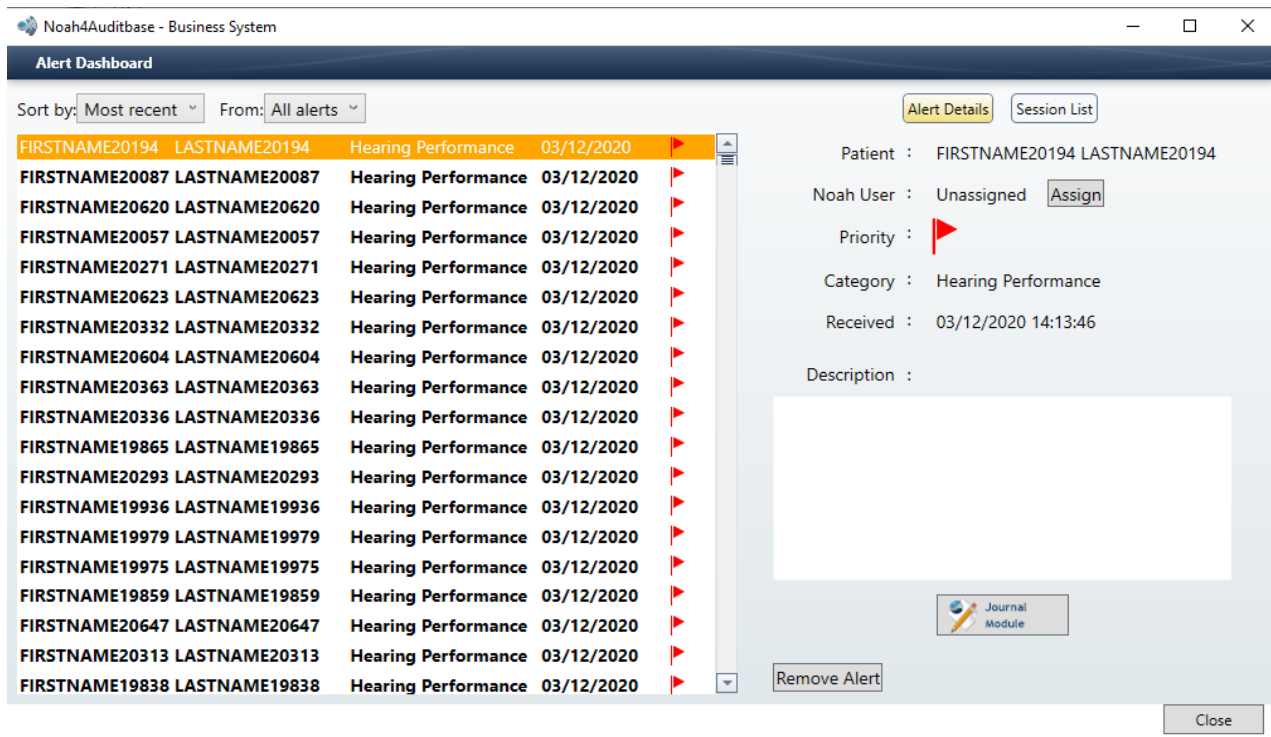
On the right-hand side of the Noah toolbar the globe icon  opens the **Noah Alerts Dashboard**. Noah alerts could be created when a hearing instrument wearer activates one using the mobile App supplied to them by their hearing instrument manufacturer and when the Noah Mobile API is enabled in your Auditbase by your System Administrator.



When the Globe has a red element  that indicates that there are one or more unread Alerts in the Dashboard. When every Alert has been viewed by any user then the red element is removed from the icon.

Opening the *Noah Alerts Dashboard* reveals the list of Alerts for all patients who the Auditbase user has permission to view. They will not see any Alerts linked to patients who they are not allowed to access, either due to the patient belonging to a Location that the user has no rights to access or due to the patient having only limited named users allowed to access them.

- Unread Alerts are shown **in bold**. Alerts with the *Priority flag* set have a red flag next to them.
- When an Alert is selected the detail appears in the right-hand panel showing the description from the patient. A specific Noah user can be assigned using the Assign button.



Patient : FIRSTNAME120 LASTNAME120  
Noah User : JULIE TYAS   
Priority :   
Category : Hearing Performance  
Received : 30/11/2020 13:55:15  
Description :  
Problems hearing the TV.

**Session List**  
11/12/2020 :  
ANDSHU Auditbase audiogram  
ANDSHU Nyt audiogram  
01/12/2020 :  
ANDSHU Subj1  
30/08/2013 :  
TESTS:HIMSA - Noah 4 Audiogram Module  
TESTS:Amplivox Ltd  
TESTS:Amplivox Ltd  
23/08/2002 :  
HILL:HIMSA - Noah 4 Audiogram Module  
01/12/2001 :  
LCAVILLA:HIMSA - Noah 4 Audiogram Module

Above the Alerts list the 'From' dropdown allows the user to filter on only the Alerts assigned to them as well as to filter on unassigned Alerts.

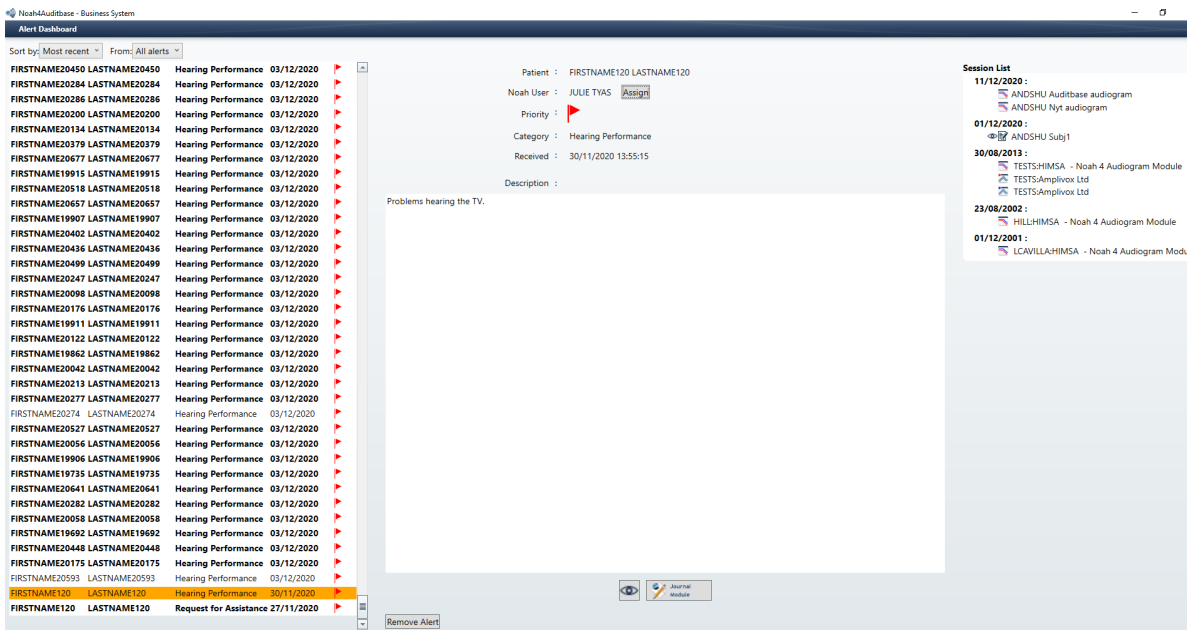
Noah4Auditbase - Business System

**Alert Dashboard**

Sort by:  From:

FIRSTNAME20450 LASTNAME20450	Performance	03/12/2020	
FIRSTNAME20284 LASTNAME20284	Performance	03/12/2020	
FIRSTNAME20286 LASTNAME20286	Performance	03/12/2020	
FIRSTNAME20200 LASTNAME20200	Hearing Performance	03/12/2020	
FIRSTNAME20134 LASTNAME20134	Hearing Performance	03/12/2020	
FIRSTNAME20379 LASTNAME20379	Hearing Performance	03/12/2020	
FIRSTNAME20677 LASTNAME20677	Hearing Performance	03/12/2020	
FIRSTNAME19915 LASTNAME19915	Hearing Performance	03/12/2020	
FIRSTNAME20518 LASTNAME20518	Hearing Performance	03/12/2020	
FIRSTNAME20657 LASTNAME20657	Hearing Performance	03/12/2020	
FIRSTNAME19907 LASTNAME19907	Hearing Performance	03/12/2020	
FIRSTNAME20402 LASTNAME20402	Hearing Performance	03/12/2020	
FIRSTNAME20436 LASTNAME20436	Hearing Performance	03/12/2020	
FIRSTNAME20499 LASTNAME20499	Hearing Performance	03/12/2020	
FIRSTNAME20247 LASTNAME20247	Hearing Performance	03/12/2020	

If the window is **maximized** then visible to the far right is the patient's Session List to help put the Alert in context.



Underneath the description is an **'eye'** button which could open a webpage associated with the manufacturer's module. The Journal module icon would open the Noah Journal module if installed.



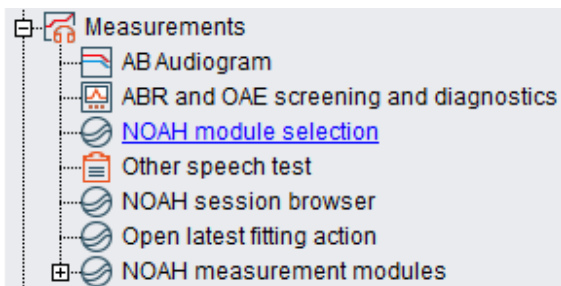
Beneath that at the bottom is the **'Remove Alert'** button. Be sure to remove Alerts that have been acted on to avoid the Alert dashboard becoming slow to load over time as the number of Alerts increases.



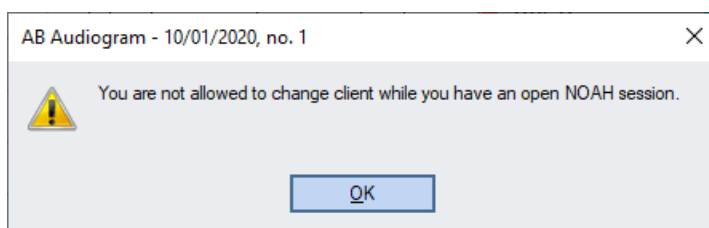
## 8.13 Changing clients with Noah running

When taking a busy fitting clinic, you can close open Noah modules but leave Noah active and change client in Auditbase.

- To do this, without closing Noah, select the Auditbase icon from the taskbar at the base of the desktop. The global Client can now be changed.
- To return to Noah simply use the **Noah module selection** or **Noah session browser** shortcuts from the Measurements menu in Auditbase and that part of Noah will become the focus. On slower PCs, a Noah splash screen will be shown while Noah changes the client.



- If there is any module currently left open you will be told that a session is already open and you should select the Noah Module icon on the taskbar to close it. If you were in the process of deleting a Noah action you will also be informed that a session is open.



- While Noah is minimized the icon is hidden in the Systray (the area in the bottom right corner where the clock is).
- The icon in the Systray is not really needed as the Auditbase Measurements menu should be all you need.
- If you do want to use the icon in the Systray, reveal it by clicking the small up arrow to show all icons. You can configure Windows to always show the Noah icon by clicking the up arrow choosing 'Customize'.



## 9 Onward referrals and reporting

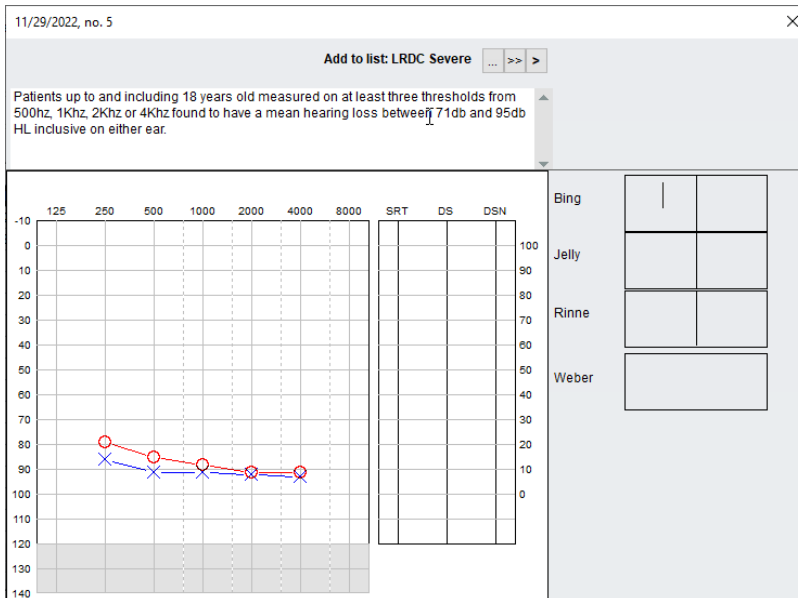
The Onward referrals module allows you to collect patients together who are eligible for referral to internal or external services or who need to be reported on nationally and track the status of their progress through the referral or reporting process.


This module contains onward referral lists where patients can be added. A patient can be added to an onward referral list automatically if their audiogram triggered an addition to such a list, or manually, directly from the *Onward referrals and reporting* module, or the *Onward referrals and reporting* tab in Client information.

*Onward referrals and reporting* can be opened from *Navigation*, from the *Onward referrals and reporting* tab in Client information, or from the *Add to list* dialog following the audiogram preview button notification.

## 9.1 Automatic addition to onward referral lists

If a patient audiogram triggered a notification rule that adds a patient to an onward referral list, users will be alerted by the audiogram preview button on the toolbar being highlighted . On clicking the highlighted button, the Audiogram preview dialog opens where further action can be taken. Use  to see the notification.



Employing the ellipsis button , you can **Add/Edit onward referral** and make any required changes. You can attach the person or organisation that a patient will be referred to and appointment to this onward referral. The audiogram that triggered the addition to the list is in text form.

### Status

Status is used to track the patient's progress in the onward referral process. The change of status from default (*Added to list*) means removing the notification for that patient.

- Some statuses (e.g., *referred, declined*) take the patient forward in the onward referral workflow.
- Other statuses (e.g., *unsuitable, further assessment needed, to be discussed, etc.*) need some review of the audiogram and other patient information and then making some user decision about what to do with patient addition to the list.
- Statuses with the option in Auditbase Administration 'Notify again on audiograms saved in the future' will notify the user again if another audiogram is recorded that matches the rule.
  - When one of these statuses is applied, then if the audiogram is saved again and it still matches the notification rule, the user will be notified again.

Add/Edit onward referral
✕

The Auditbase audiogram must not be used as the sole means by which a diagnosis is made.

---

Referred to

Responsible user

At appointment

Audiogram **11/29/2022, no. 5**

Status

Added by LRDC Severe,  
Audiogram: 11/29/2022, no. 5

Patient consent

The **>>** control opens the *Onward referrals and reporting module* - > *Members tab* with all users included in the onward referral list.

## 9.2 Reviewing onward referrals

You can view all patients on a particular list from the Members tab. If you opened the module from Navigation, you need to select the list first on the *Lists tab* to be able to see its contents on the Members tab.

On the Members tab, you can review the members of each list. With long lists, you can filter by *Status* or *Responsible user*, only one value can be selected at a time. The text to the right under the description box shows how many clients are in the list and how many are visible under that filter.

You can add new patients via the **Add selected client** and **Search and Add clients** controls. The 'Add selected client' option will add the global client to the list. You can use the **Search and Add clients** option to find other clients to add. Using parameters on that dialog, including on the **Show advanced criteria** section, allows you to retrieve and add multiple clients who meet certain criteria including from **Client Parameters** and from **Search by hearing loss** and Search by device(s).

Referred to	At appointment	Hospital no.	Name	Gender	User added	Responsible user	Parameters	Current age	Date added	Status	Status date	Comment
✓ MARORA	1 * 11/30/2022	1 T132991	20-111FIRSTNAME32991 15-LASTNAME32991	Male	SysAdm	SysAdm		17y	11/29/2022	Added to list	11/29/2022	Added by LRDC Severe, Audiog
		T117240	MISS FIRSTNAME17240 LASTNAME17240	Female	SysAdm	SysAdm		16y	11/29/2022	Added to list	11/29/2022	Added by LRDC Severe, Audiog
		T119840	MISS FIRSTNAME19840 LASTNAME19840	Female	SysAdm	SysAdm		17y	11/29/2022	Added to list	11/29/2022	Added by LRDC Severe, Audiog

Title	Status	Status date	Comment to status	Responsible for list	Type	Consent	Cnst. chng. date
LRDC All	Added to list	11/29/2022	Comments	SysAdm	Paediatric lists	Accepted	11/29/2022
Paediatric module onward referral	Referred	11/29/2022	Comments	SysAdm	Paediatric module onward referrals	Not applicable	11/29/2022
UK NICE Implant guidance	Added to list	11/30/2022		SysAdm	Paediatric or adult referrals	Not asked	11/29/2022

Status and Client consent and the Comment to Status can all be edited directly on the row.

Detach appointment		
Date added	Status	Status date
11/29/2022	Postpone	11/29/2022
11/29/2022	Data miss	11/29/2022
11/29/2022	Deceased	11/29/2022
	Declined	
	Further as	
	Postpone	
	PTA on EN	
	Referred	
	Referred fr	
	To be disc	
	Unsuitable	

## Editing onward referrals

Use the **Edit** button to open the edit dialog and change any of the attributes of the Onward referral including adding an organisation or individual to refer to. These organisations and individuals are configured in the *Referring Agents* dialog.

Add/Edit onward referral ✕

The Auditbase audiogram must not be used as the sole means by which a diagnosis is made. OK Close

---

Referred to:  ...

Responsible user:  ▾

At appointment:  ...

Audiogram: **11/29/2022, no. 5**

Status

▾  📅

Added by LRDC Severe,  
Audiogram: 11/29/2022, no. 5

---

Patient consent

▾  📅

To select multiple clients tick each row on the left-most border. If you highlight another row that row is added to the multiple selection while it is highlighted. The text above the list table shows how many records are selected.

	Referred to	At appointment	Hospital no.	Name	Gender	User added	Respons
✓	MARORA	1 *, 11/30/2022, 1	T132991	20-111FIRSTNAME32991 15-LASTNAME32991	Male	SysAdm	SysAdm
?			T117240	MISS FIRSTNAME17240 LASTNAME17240	Female	SysAdm	SysAdm
✓			T119840	MISS FIRSTNAME19840 LASTNAME19840	Female	SysAdm	SysAdm

You can edit the Status on multiple clients simultaneously by using this multiple selection and the **Change status** button. See details in [Status](#).

You can export the list of patients Onward referrals to use in Excel. You can also generate letters to one or more patients by making a multiple selection on the list and creating a letter based on a template which has been assigned in Documents module as being available in the Onward referrals and reports module. Furthermore, it is possible to attach or detach appointments for patients directly on the list by highlighting the corresponding list entry and using the respective control.

A client can only be recorded on any particular Onward referrals and reports list once. If the client is on multiple lists the other lists will be shown in the table at the bottom of the screen.

If the user does not have the right to see lists of some specific type, they will not be able to select that list from the *Lists tab*. Patient membership on these lists will not be shown for that user on the *Members tab* - > *Other referrals table*.

### 9.2.1 Status

Status is used to track the patient's progress in the onward referral process. You can edit the Status on multiple clients simultaneously by using this multiple selection and the **Change status** button.

The change of status from default (*Added to list*) means removing the notification for that patient.

- Some statuses (e.g., *referred, declined*) take the patient forward in the onward referral workflow.
- Other statuses (e.g., *unsuitable, further assessment needed, to be discussed, etc.*) need some review of the audiogram and other patient information and then making some user decision about what to do with patient addition to the list.

- Statuses with the option in Auditbase Administration 'Notify again on audiograms saved in the future' will notify the user again if another audiogram is recorded that matches the rule.
  - When one of these statuses is applied, then if the audiogram is saved again and it still matches the notification rule, the user will be notified again.

### 9.3 Managing onward referral lists

On the *Lists tab*, you can see Onward Referral lists that have already been added in Auditbase.

When a list is selected, the comment section below the table will display comments related to that particular list. Each list is assigned a type and a responsible person that can be changed via the **Edit** control. Users can also create new referral lists or delete existing, employing the corresponding buttons on top. To filter out lists unrelated to yourself, activate the option "Show only assigned to me".

Lists
Members

New
Edit
Delete
↺

Show only assigned to me

Title	Responsible	Type	
LRDC All	SysAdm	Paediatric lists	
LRDC Profound	SysAdm	Paediatric lists	
LRDC Severe	SysAdm	Paediatric lists	
Paediatric module onward referrals	SysAdm	Paediatric module onward referrals	
Swedish Severe hearing loss register	SysAdm	Adult lists	
UK NICE Implant guidance	SysAdm	Paediatric or adult referrals	

Comment on selected referrals list

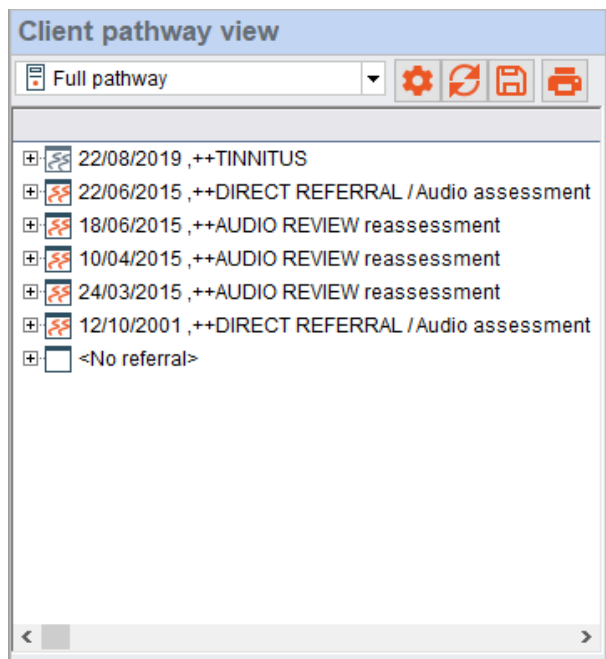
Severe hearing loss

## 10 Client pathway overview

To open the **Client pathway overview**, select from the Auditbase **Navigation** area → **Client pathway overview**.

Planned and completed actions in a referral pathway can be seen, whether you're using referrals and appointments or not. The initial view that is displayed can be set by default.

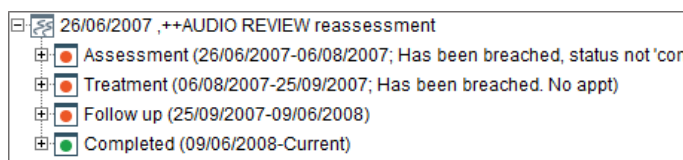
There is an easy to use but highly flexible configuration for site and user favourite views. You can create new actions and easily see an overview or the detail of most standard actions in a journey.



Navigation around the pathway view can be performed by using the keyboard arrow and tab keys as well as using the mouse.

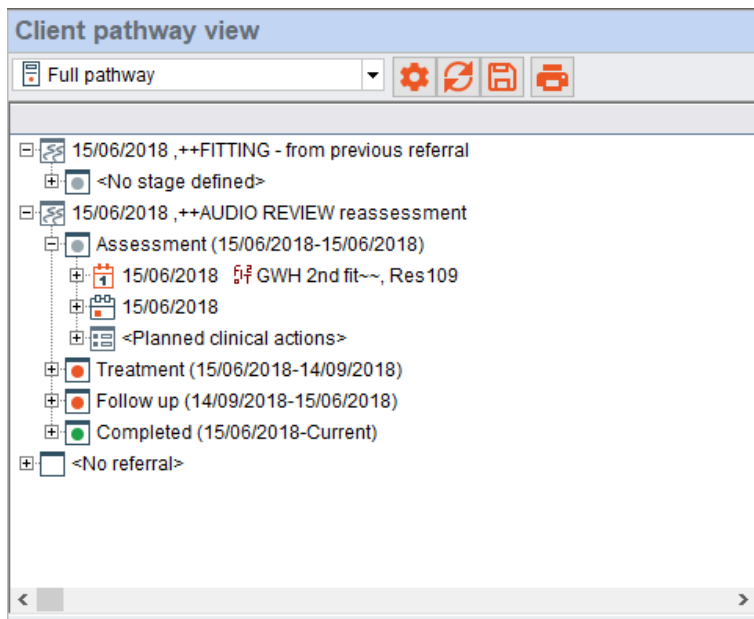
Each of the stages has two dates adjacent to the title. Stages that have already been completed will show the stage start date and the stage end date respectively. The following stage will show the date of the completion of the previous stage as the start date.

Referral breach warnings will be displayed as part of each stage.



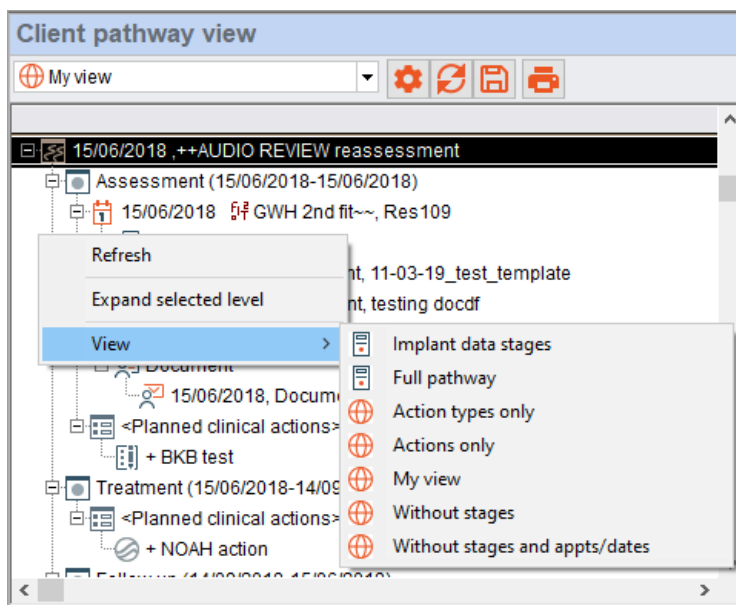
Expanding one of the stages will display all the tests and/or forms that have been completed for this stage.

You will also see a list of the Planned clinical actions, which are the tests and/or forms that are appropriate for this stage as set by the System Administrator. Any completed appointments are also shown with any associated clinical actions.



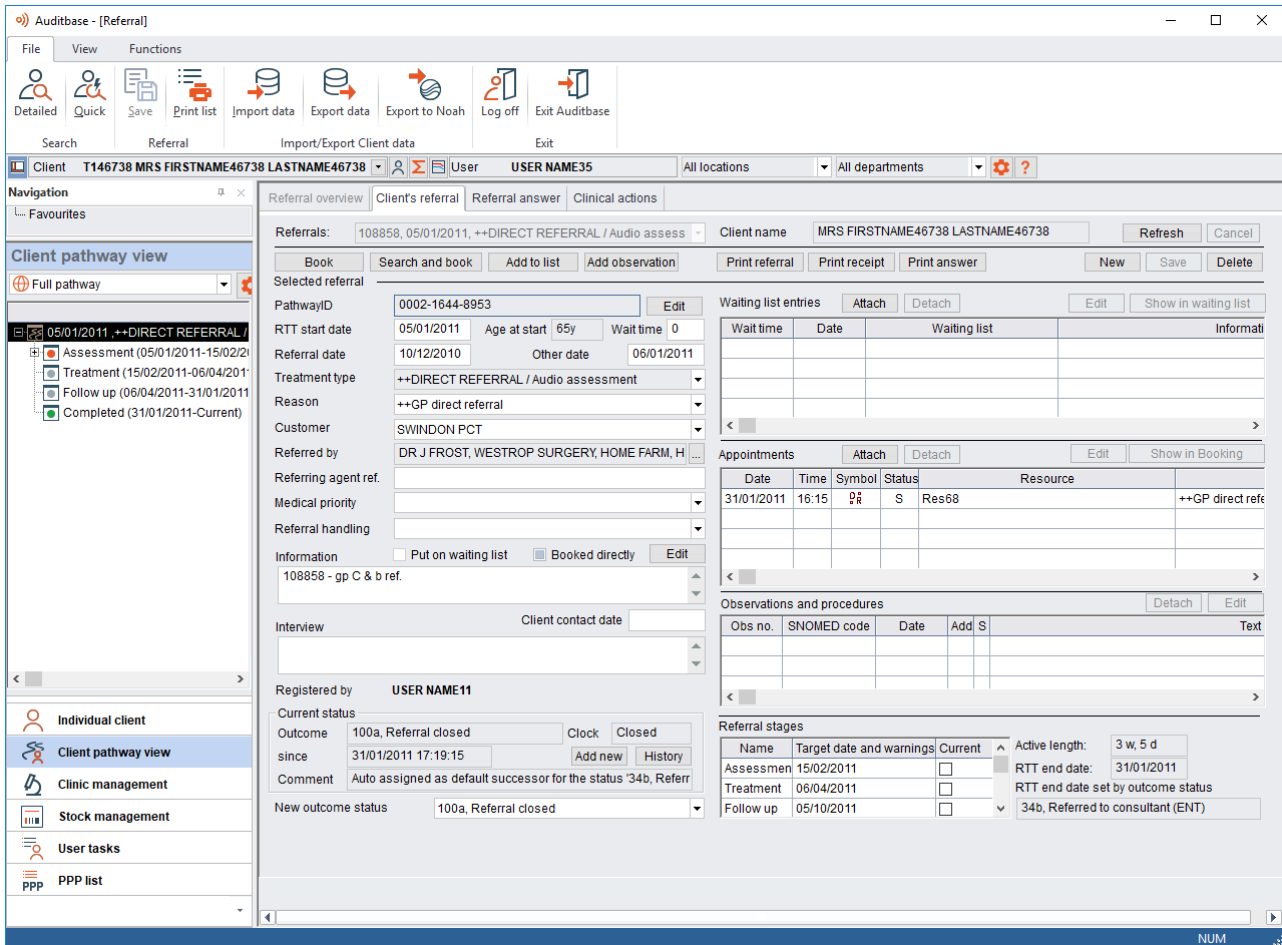
Right clicking on any action or appointment will show a series of options.

- **Refresh** – Will refresh the entire pathway.
- **Expand selected level** – Will open the items in the levels below the selected one.
- **View** – Any of the pathway views can be selected by selecting **View** and then the relevant pathway.



## 10.1 Changing the size of the viewing pane

Selecting an action or appointment will display the relevant information on the right hand-side of the screen.






The size of the left and right-hand panes can be changed. Drag the Navigation area left or right from its right border edge. Click and drag the border using the mouse to re-size the viewing panes. Increasing the size of the Navigation area will allow complete viewing of available icons.

## 10.2 Icons

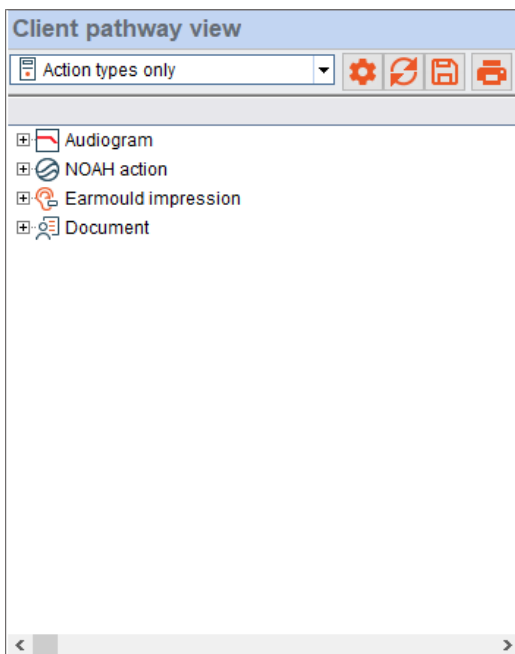
### 10.2.1 Stages

Each stage has an icon which are coloured differently depending on if the stage has been completed or is the current stage.

-  - Incomplete stage
-  - Complete stage
-  - Current stage

### 10.2.2 Actions





Each type of action has an icon. These icons are coloured if an action has been completed.



They are uncoloured if the action has not been completed.

### 10.2.3 Appointments

An appointment icon will change depending on if the appointment has an action linked to it or not

-  12/27/2013  V5 Test Follow Up, Res55 - Appointment does not have a linked action
-  1/2/2014  Test Follow Up, Res46 - Appointment does have a linked action



## 10.3 Actions linking to appointments

On several types of actions, auto-linking to appointments can be provided. Examples include such action types:

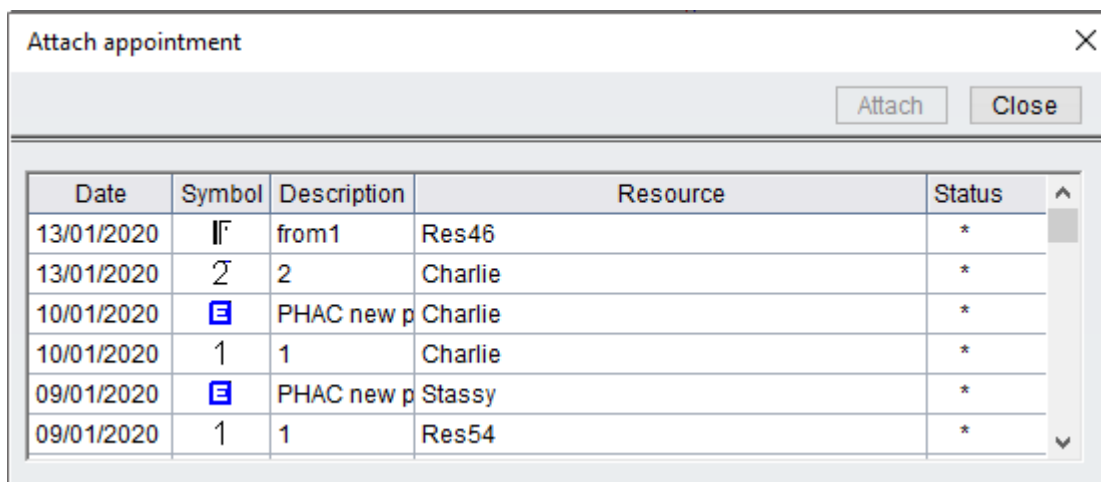
- SaLT tests
- Documents
- Questionnaires
- Stock actions
- Earmoulds

Auto-linking settings are defined in the system administration tool.

If such a clinical action is created, the most relevant appointment will be attached. If only one appointment occurs for the client that day, and the appointment start time is earlier than the current time, then the action will be attached to that appointment. If it is not clear which is the most relevant, for instance if there is more than one appointment on the same day or none at all that day, a dialogue box will open asking you to attach the most appropriate appointment.

Each dialogue box for such action has a special button for attaching the action to or detaching it from an appointment. The button is equipped with a symbol which reflects the state of the action: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the action linking.

To attach an appointment, click this button and an information dialogue box will open where you can **Attach** the correct appointment to link to the action. The button icon now changes to show an appointment is attached.



If the appointment is linked to a referral, then the **Referral stage**, where the appointment took place, will be shown here.

Auditbase - [Client pathway view]

File

Detailed Quick Import data Export data Export to Noah Log off Exit Auditbase

Search Import/Export Client data Exit

Client <T>18765 MR JOHN SMITH User SYSTEM ADMINISTRATOR Multiple locations... Multiple departments... ?

Navigation

- Favourites
  - Referral
  - Documents and attachments
  - Waiting list
  - AB Audiogram
  - Attention list
  - User reports
  - Booking
  - Invoice
  - NOAH session browser
  - Open latest fitting action

Client pathway view

Full pathway

- 22/08/2019, ++TINNITUS
- 22/06/2015, ++DIRECT REFERRAL / Audio assessment
- 18/06/2015, ++AUDIO REVIEW reassessment
  - <No stage defined>
    - 10/01/2020 PHAC new patient mould-, Charlie
      - BKB test
        - 09/01/2020, BKB test, L: HA1, R: HA1
        - 18/06/2015 ENT new patient mould-, Travy
          - 18/06/2015
  - 10/04/2015, ++AUDIO REVIEW reassessment
  - 24/03/2015, ++AUDIO REVIEW reassessment
  - 12/10/2001, ++DIRECT REFERRAL / Audio assessment
  - <No referral>

Individual client

Client pathway view

Clinic management

Client MR JOHN SMITH Compare results New Save Delete

Tests 09/01/2020, 1, L: HA1, R: HA1, +10 dB1 Created by SYSTEM ADMINISTRATOR

Date of test 09/01/2020 Age at test 79y Referral stage Assessment

Not administered Appointment attached: \*, 10/01/2020, PHAC new patient mould- 0

Left ear HA1 Right ear HA1

Presentation level 70dB SPL Test condition Audition + lipreading122

Noise level (signal > noise) +10 dB1 Noise type White

Lists Used Number of Sentences Presented 16




Optional calculation of results

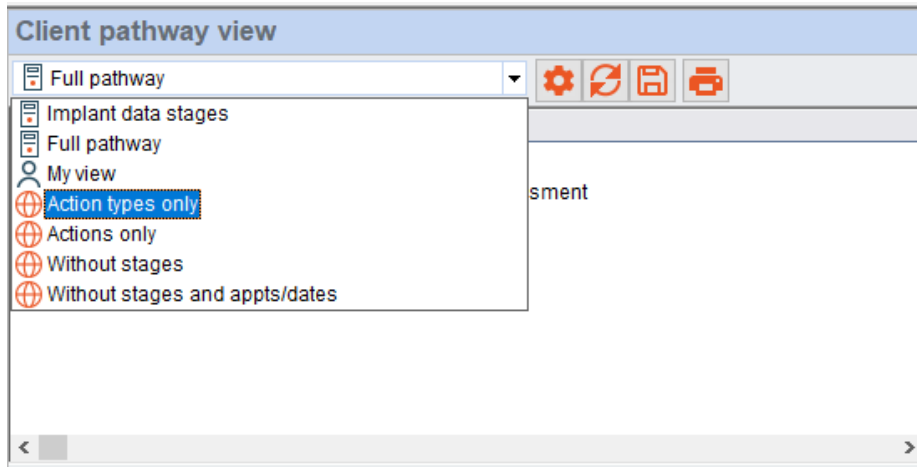
Number of Key Words Presented 9 % of Key Words Correct 56





Number of Key Words Correct 5

Notes

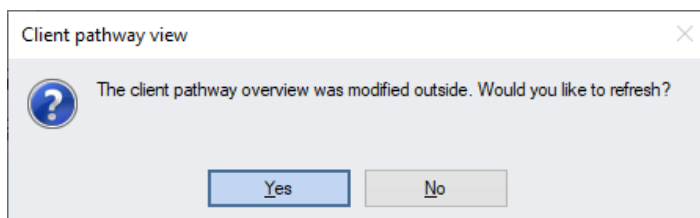
## 10.4 Pathway views

At the top of the Client pathway overview, you can choose the type of **View** from a drop-down list and save that view as your default. These views have icons showing if they are a global view , a site view , or user view .




-  - Configure View (Shortcut = F4). See the details of the selected view and configure your own.
-  - Refresh View (Shortcut = F5). When an action is added to or moved on the pathway you can refresh using this button and your view of any expanded sections will be maintained.
-  - Save defaults (Shortcut = F6). Save the position of the vertical bar and the current view as default.
-  - View missing actions in a pathway. Run a crystal report displaying user defined missing actions for selected Treatment types.

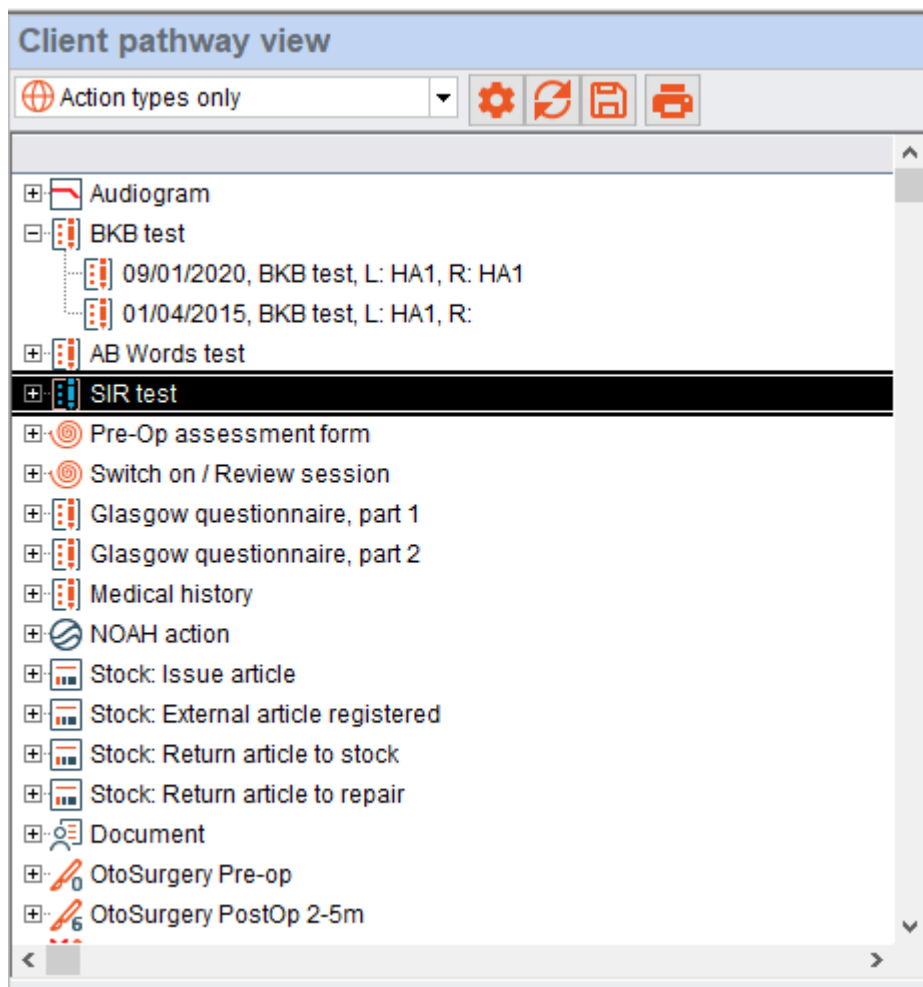
If changes are made to any element of the overview outside of the **Client pathway overview**, a message window will appear advising you of this and whether you want to refresh the overview or not.



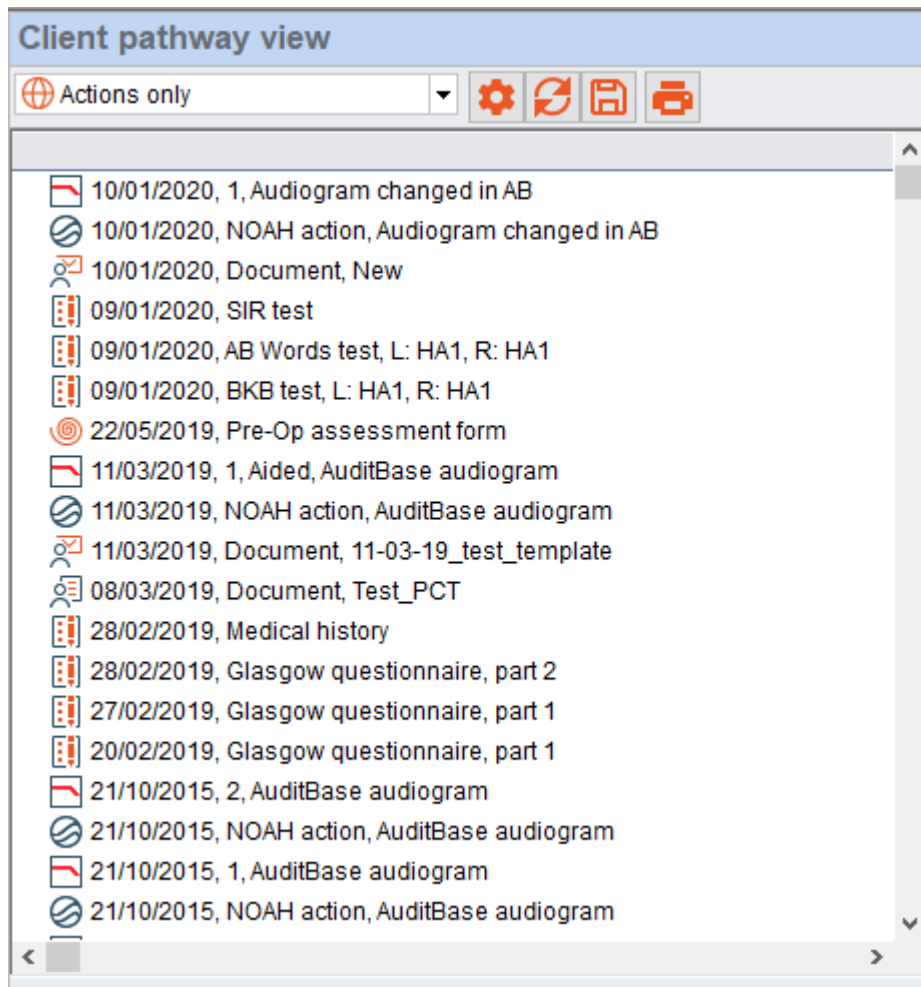
### 10.4.1 System default views

There are a number of system default views set by Auditbase System which can be used as templates for site default views or user specific views. You can view in detail how each template view is made using the Configure  button mentioned below.

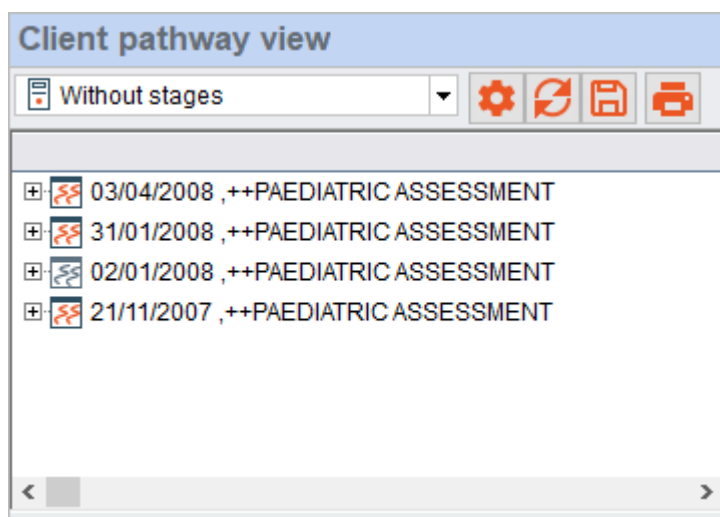
- **Implant data stages** – For use with Implant module licenses only.
- **Full pathway** – Displays all referrals, clinical actions and appointments in Stages including planned actions.
- **Action types only** – Displays the action types with actions attached showing the date of the action.



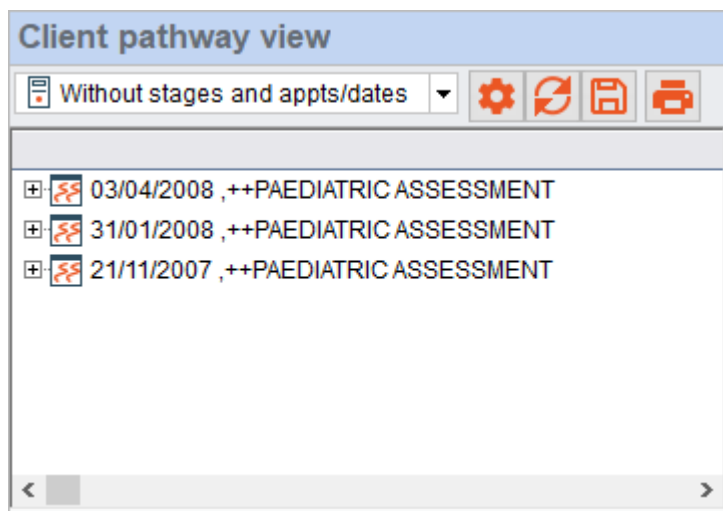
- **Actions only** – Displays all actions grouped by action then in date order, newest action at the top.




- **Without stages** – Displays referrals with attached actions and appointments but no referral stages.

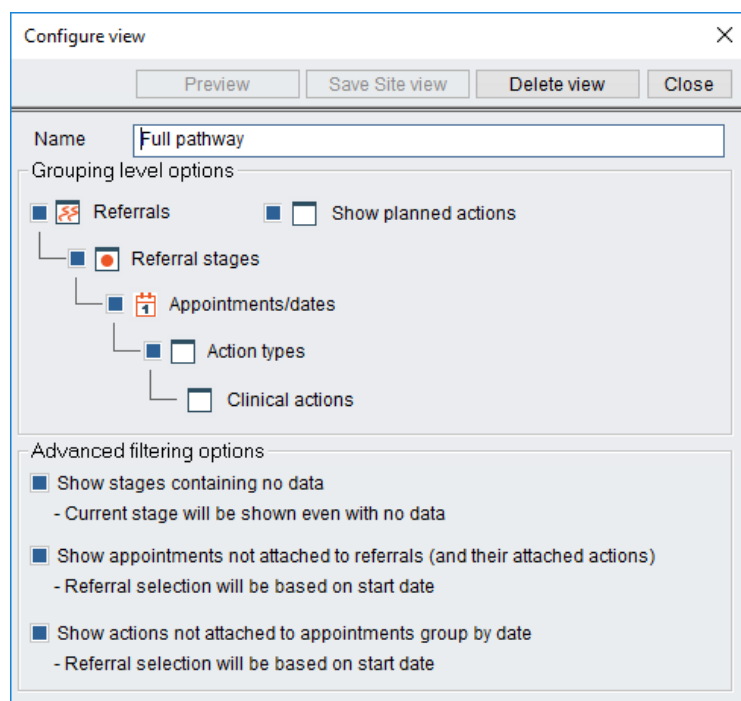


- **Without stages and appts/dates** – Displays referrals and actions but does not shows stages or appointments.



## 10.4.2 Configure Views

By selecting the Configure button  , views can be configured and saved. A **Configure view window** will open.

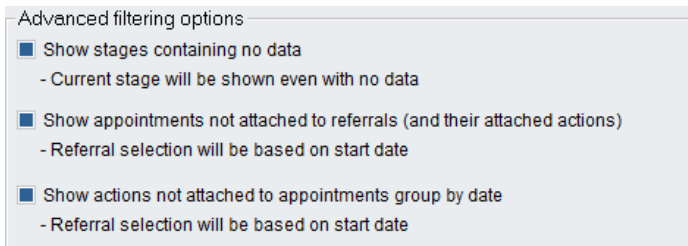


The global views cannot be changed. The view must be saved as a site or user view. Making any adjustments to the view will cause the name to be changed to remind you to save as site or user view.

Name

**Grouping level options** can be chosen by checking or unchecking the relevant boxes. Planned actions which have not been completed can be shown by checking the **Show planned actions** box.


There are additional filtering options which are shown in the section titled **Advanced filtering options**. The filter will be active if the relevant box is checked.



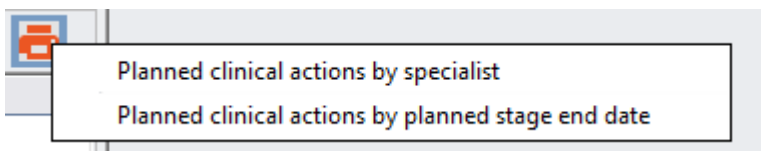
- **Show stages containing no data** – Stages will be shown even if there is no data associated with the stage.
- **Show appointments not attached to referrals (and their attached actions)** – If there are appointments which are not attached to a referral, the appointment will still be shown.
- **Show actions not attached to appointments group by date** – Actions which are not attached to appointments will be grouped by the date of the appointment.

Once you have made changes to the view, you can preview it before saving by selecting the **Preview** button. Once you are happy with the correct layout, you can give the view a **Name** and **Save site view**. The view will then be saved in the list in alphabetical order.

### 10.4.3 Missing Actions Reports

Selecting the printer symbol  from the Client pathway view pane will open a choice of two system reports.

- Planned clinical actions by specialist
- Planned clinical actions by planned stage end date



Using these reports will allow you to identify incomplete actions within an individual client pathway or multiple clients' pathways.

### Multi selection fields

To report on multiple values from multi-selection fields, each value is clicked on and moved to the **Selected items** box using the arrows adjacent to the box. When a value is transferred to the **Selected items** box that value will be reported on and anything left in the **Available items** box will not be reported on.

Missing actions in pathways

Current filter: <New filter> Save Save as ... Delete

Missing actions in pathways Run report

**Filtering clinical actions** Ignored

Specialist

Available items: Audiology tests and measurements, SaLT tests, ToD tests, General

Selected items:

Add All Remove All

**Additional clinical action types** Ignored

Available items: Audiogram, BKB test, BKB Sentences test (Adaptive or Non adaptive), AB Words test, CUNY test, VSA test, Common phrases test, Mr. Potato test, CAP test, CEPS test, SIR test

Selected items:

Add All Remove All

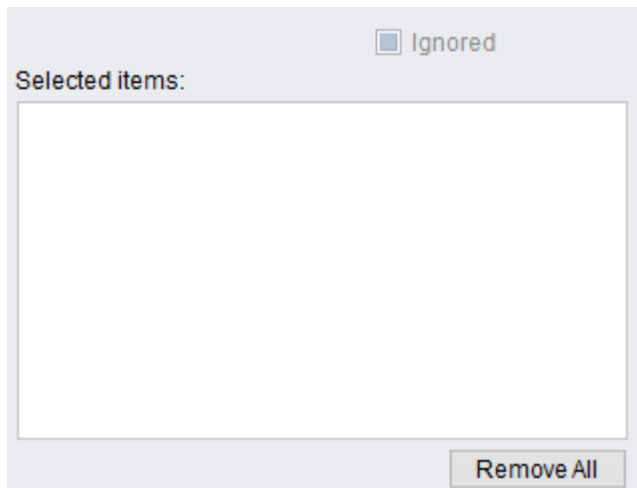
**Treatment type** Ignored

Available items: ++AUDIO REVIEW reassessment, ++DIRECT REFERRAL / Audio assessment, ++FITTING - from previous referral, ++NEONATAL ASSESSMENT, ++PAEDIATRIC ASSESSMENT, ++TINNITUS, ENT Hearing aid referral, PAEDIATRIC hearing aid journey (PHAC), SPECIALISED TEST REFERRAL, Test treatment type, x DO NOT USE -AUDIO ASSESSMENT

Selected items:

Add All Remove All

Above each **Selected items** box is a check box titled **Ignored**. This remains checked until a value is moved into the box. If values are not moved across to a **Selected items** box and that box remains empty, no filtering will be done on that selection and all parameter values will be included in the report.



## Lists

If there is a list of possible values which could be used in multiple reports (such as Assessment appointment symbols) these can be defined in Lists set up in **System Administration** -> **Other definitions** -> **Lists for report parameters**.

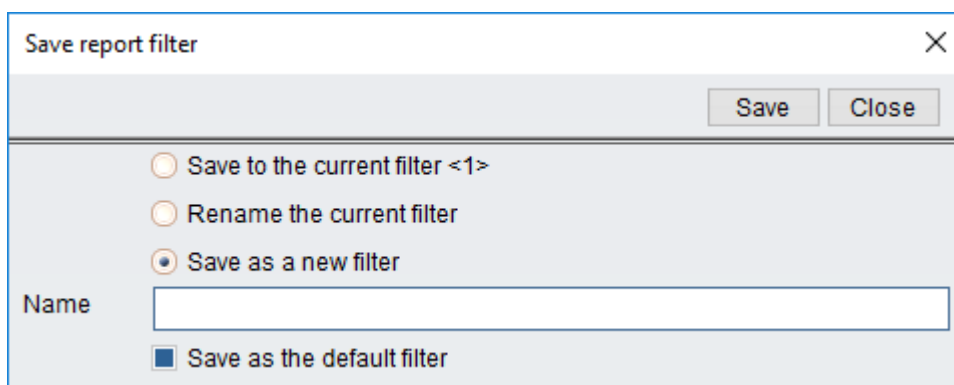
## Show List Items

When a parameter is a list of items, you can view the items by clicking on the **Show list items** button. The button will only appear when you have selected a value containing a list.

Although the list items will be shown, you cannot make changes to the list from here. This must be done from within System Administration since the same list may be being used in other reports and to make changes will affect all the reports it is used in.

## Report Filters

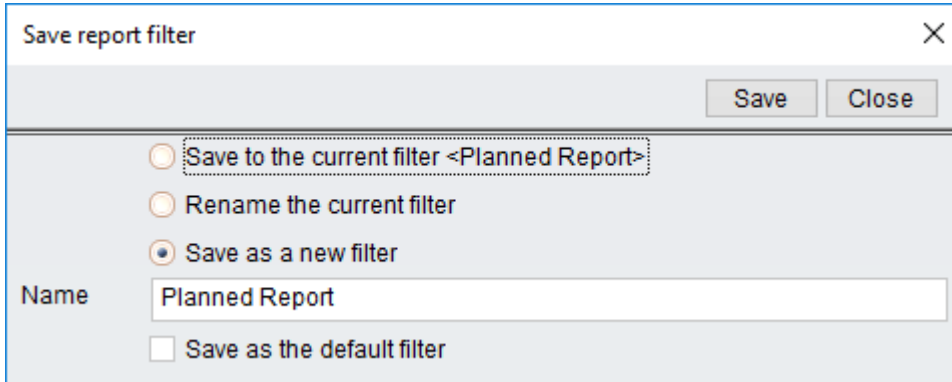
To save report value selections you have made, click **Save**. You will be asked to give the selections a **Filter** name.



Once you have done this, the report selections are saved as a named **Filter** and can be accessed from the **Current filter** drop down list.

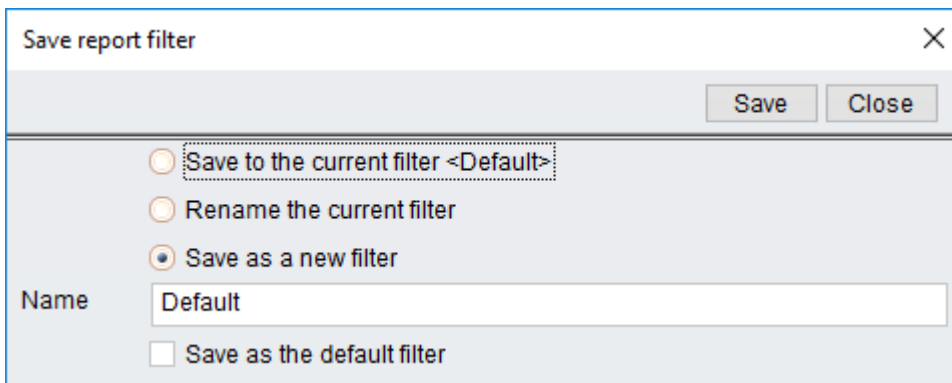
## Multiple Report Filters

You can create differing versions of the same report and save them as Filters. To do this, open the report you wish to adjust the parameters on. Change the values and click Save as. Give the filter a name.



This will now be available in the **Current filter** drop down box along with your original report set-up. Saving each report change as a filter will mean they are all there to be re-used in the future. There is no need to keep re-building reports with varying values.

You can also direct Auditbase as to which report should be the default.



The report will always open the default report as standard.

If you have made changes to report parameters but have not saved them, you will be asked if you wish to save them if you re-open the User reports list or exit Auditbase.

## Run and refresh

The **Run report** button will highlight yellow as soon as a parameter is changed. This will alert the user to the need for refreshing the existing report output. Clicking on the **Run report** button will generate a new output for CSV reports.

The screenshot shows a software interface for generating reports. At the top, it says 'Missing actions in pathways'. Below that is a 'Current filter' section with a dropdown menu showing '1 [Default]'. To the right of the dropdown are three buttons: 'Save', 'Save as ...', and 'Delete'. Below the filter section is another 'Missing actions in pathways' label with a vertical scrollbar and a yellow 'Run report' button.

The white space to the right of the parameter lists will display the running dialogue and its progress. If the report data is short, the dialogue will only flash onto the white area before disappearing. A Stop button will display along with the report dialogue in order that the process can be brought to a halt if it is taking too long to complete.

A LOG file is included in the output file in case there were errors which can be reported to Support. If the report ran without errors, then it does not need to be retained and can be deleted.

The reports consist of several parameters which you will need to populate with variables in order for a report outcome to be achieved.

The two reports have different groupings in the output layout, specialist or planned stage end date;

- Planned clinical actions by specialist
- Planned clinical actions by planned stage end date

### Report Parameters

- Filtering Clinical Actions – Specialist - Variables available here consist of tests and measurements grouped into specialist areas according to the standard Tests menu grouping.
- Additional clinical action types – Variables here allow you to add additional measurements and tests not included in the first Parameter.
- Client Professional Contacts – Referring agents who are linked to at least one patient on the Additional Professional Contacts on the details tab.
- Treatment Type (Mandatory field – Must be populated) – Select the treatment type(s) you wish to report on.
- Other variables allow you to look at patients with only certain alerts, GP's, PCT's and Customers

*The report outcome layout uses Crystal Reports. If required a custom version of this layout can be produced by the support office at the normal rate.*


Printed: 05/03/2020

### Planned clinical actions by specialist

Full name	Hospital no.	NHS no.	Patient keyworker	Patient age	RTT start date	Current outcome status	Treatment type	Treatment stage	Stage status	Stage end date planned	Stage end date planned year/ month	Stage end date in fact	Planned clinical action	Action completion date
<b>Audiology tests and measurements</b>														
FIRSTNAME625 LASTNAME625	T 1625		Unknown keyworker	29	20/02/2020	10a, Awaiting first ACTIVITY	++AUDIO REVIEW	Assessment	Current	01/04/2020	April 2020		BKB test	
FIRSTNAME3864 LASTNAME3864	T 13864	1111111111	DR GJ BARRON	20	02/07/2019	100a, Referral closed	++AUDIO REVIEW	Assessment	Completed	18/03/2020	March 2020	08/02/2020	BKB test	
FIRSTNAME3864 LASTNAME3864	T 13864	1111111111	DR GJ BARRON	20	02/07/2019	100a, Referral closed	++AUDIO REVIEW	Treatment	Current	07/05/2020	May 2020		NOAH action	
FIRSTNAME625 LASTNAME625	T 1625		Unknown keyworker	29	20/02/2020	10a, Awaiting first ACTIVITY	++AUDIO REVIEW	Treatment	Not started	21/05/2020	May 2020		NOAH action	

### 10.4.4 No referral

If an action or appointment is not linked to a referral, possibly because the department is not using referrals, the action or appointment will be added to **<No referral>** and will be grouped by appointment date under **<No stage defined>**.

- ☐ <No referral>
  - ☑ <No stage defined>
    - 📅 25/03/2003 B BATTERIES 3, Res73
    - 📅 11/12/2002 R GWH Repair, Res73
    - 📅 28/10/2002
    - 📅 12/07/2002 R GWH Repair, \* Res56
    - 📅 27/06/2002 📄 GWH Earmould, \* Res65
    - 📅 27/06/2002

# 11 Earmoulds

Click the button below to access our training materials.



To access the **Earmoulds** window, enter **Shift+Ctrl+E** or go to the **Navigation** area -> **Earmoulds**.

The screenshot shows the 'Earmoulds' window for a client named 'MISS.FIRSTNAME41844 LASTNAME41844'. The window includes a search bar, buttons for 'Print', 'Label', 'Earmould list', 'Waiting lists entries', 'Print stat', and 'Open with latest'. The client information section shows 'Hospital no. T141844' and 'Name MISS.FIRSTNAME41844 LASTNAME41844'. Below this, there are sections for 'Earmoulds' and 'Moulds' with various input fields for 'Manufacturer', 'Date of impr.', 'Sent to manu.', 'Ready', and 'Issued'. There are two side-by-side sections labeled 'RIGHT' and 'LEFT' for entering mould details, each with fields for 'Mould', 'No.', 'Eardrum', 'Material', 'Vent', 'Sound channel width', 'length', 'Currently worn', and 'Manuf. ID'. At the bottom, there are sections for 'Comments on mould(s)', 'Allocated aid', 'Hold for', 'Action' (with checkboxes for 'Waiting list', 'Booking', 'Post', 'Priority'), 'Customer' (SWINDON PCT), 'User' (SYSTEM ADMINISTRATOR), 'Audiogram', 'Delivery location', 'Address line 1', 'Address line 2', 'Centre number' (EM\_C1), and 'Postcode' (EM PO).

Any activity regarding earmoulds for a client is listed by date and on-going number when more earmoulds are entered for a client on the same date.

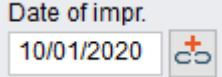
The following functions are available:



<p><b>Label</b></p>	<p>Produces an earmould label which automatically contains all the information entered.</p> <p>Centre number will be stored with the earmould ONLY when the earmould label is printed. If the Centre number comes from Workstation settings the stored value will be changed if the label is printed a second time from a workstation with a different centre number.</p>
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<b>New</b>	Clears all details so a new earmould can be entered.
<b>Save</b>	Saves the earmould details.
<b>Delete</b>	Removes the earmould from the client.
<b>Print</b>	Produces an earmould report including the attached audiogram.
<b>Print stat.</b>	To extract statistics from the Earmould module, press Print stat. There is also the option to export these statistics to .csv files.
<b>Waiting list entries</b>	Click this button to display the <b>Client's appointments and waiting list entries window</b> where you can review, create, or edit Waiting list entries.
<b>Search</b>	<p>Click this button to open the <b>Search earmoulds</b> window. Enter the mould number in the <b>Earmould number</b> field, select <b>Search</b> and either double click the required mould or choose <b>Select</b>.</p> <p>The search dialog will show the centre number and can be filtered on the centre number for easier searching over multiple locations. The default number for the filter comes from the centre number used on that workstation but can be changed here.</p> <p>The delivery address is taken from Location where specified. If Location is not specified then the default address in the <b>System Administration -&gt; Earmould</b> settings is used.</p>
<b>Earmould list</b>	<p>Opens the Earmould list, which displays a list of earmoulds, either Paediatric or Adult, filtered within a date range, either Date of impression, Date ready or Date Issued. Earmoulds that are Not Ready or Not issued can be shown by checking the appropriate box allowing you to narrow the results to earmoulds that were Ready or Issued in a certain period or have yet to be ready or issued out.. To view the lists, select Show. To select an earmould, highlight the mould and click Select or double click the mould. To print the list, click Print.</p> <p>The client's Location can be shown in addition to the Delivery Location. This must be enabled using the <b>Show client location</b> check box above the table. The state of this check box will be saved for the user including after restarting Auditbase. Note the warning that showing <b>Client Location</b> can cause a reduction in the speed of populating the Earmould List.</p>
<b>Open with latest</b>	Check this box to have the Earmould dialog open with the latest earmould order displayed automatically.

The following information can be viewed and edited in the window:

<b>Manufacturer</b>	When a manufacturer is selected the Earmould Types and Materials
---------------------	--

	available can be restricted if a relationship between Types, Materials and Manufacturers is configured in System Administration by your System Administrator. This allows users to be selecting only from the Types and Materials supplied by the chosen Manufacturer.
<b>Hospital no. and Transport</b>	These are added from <b>Client information</b> (see Client information).
<b>Earmoulds</b>	Lists the selected client's previous earmoulds.
<b>Eardrum right and Eardrum left</b>	A free text box to enter details about the ear canal and eardrum.
<b>Mould right and Mould left</b>	Select the required earmould(s) from the dropdown lists.
<b>Material</b>	A specific earmould material can be selected from the drop-down menu.
<b>Vent</b>	Enter the vent size
<b>Sound channel width</b>	Width of sound channel
<b>Sound channel length</b>	Length of sound channel
<b>Currently worn</b>	If a previous earmould is the client's preferred one this can be recorded as <b>Currently worn</b> . On the Client Information page, the most recent <b>Currently worn</b> is shown rather than latest issued.
<b>Manuf. ID</b>	The Manufacturer ID as they use it can be recorded with the mould.
<b>Copy right to left</b>	Check box to copy <b>Mould, Material</b> and <b>Eardrum</b> information from right to left ear.
<b>User</b>	The logged in user, but can be changed manually if required.
<b>Date of impr.</b>	The date of the impression. Entered automatically by Auditbase but can be manually changed. An appointment can be linked to the earmould by selecting the link button to the right of the date  . The client's previous appointments will be shown and the appropriate appointment can be attached by double-clicking it or selecting and clicking on Attach.
<b>Appointment attachment</b>	With this button, you can attach the earmould to or detach it from an appointment. The button has a picture which reflects the state of the

	earmould: either attached (  ) or not attached (  ). In addition, the button has a tooltip that displays detailed information about the earmould linking.
<b>Sent to manu</b>	The date the impression was sent to the manufacturer.
<b>Ready</b>	The date the mould returns from the manufacturer.
<b>Issued</b>	The date the mould was issued to the client.
<b>Paediatric</b>	Check box to identify a paediatric earmould.
<b>Adult</b>	Check box to identify an adult earmould.
<b>Action</b>	<b>Waiting list, Booking, Post</b> and <b>Priority</b> check boxes.
<b>Re-mould</b>	Identifies an earmould that is being re-issued to a client.
<b>Comments on mould(s)</b>	Comments in this free text box will be printed onto the earmould label.
<b>Comments on client</b>	Can be used to add comments about the client.
<b>Allocated aid</b>	Enter details about hearing instruments that need to be allocated to this particular client or mould.
<b>Hold for</b>	Enter details about special instructions regarding who the mould must be given to when the mould returns.
<b>History</b>	Enter details about the earmould's history, for instance date of earmould repair.
<b>Customer</b>	A customer, usually a Trust or CCG, can be selected from the drop-down menu.
<b>User</b>	The user creating the earmould is pre-selected but can be chosen from the drop-down menu if the appropriate rights have been awarded by the System Administrator.
<b>Audiogram</b>	The drop-down list contains the selected client's audiograms. You can select an audiogram in this list and it will be printed with the earmould report. Click <b>Show</b> to activate a window for the audiogram review.
<b>Centre Number</b>	The Centre number is editable and is filled by default with the workstation value. This value is saved when the earmold is first saved.
<b>Post Code</b>	The Post code is taken from the delivery address which is usually only used in conjunction with the Repair module.

## 11.1 Entering Earmould details

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** area-> **Earmoulds**.
- Click on **New**.

- In the **Eardrum** right and left fields you can write about the condition of the eardrums and ear canals.
- Select earmould type from the earmould right and/or left lists.
- Check that the correct username is displayed in the **User** field. Use the drop-down list to modify, if necessary.
- Select the **Manufacturer** from the drop-down list.
- If applicable check one or both boxes **Post** and **Priority**.
- If applicable check one of the boxes **Adult** or **Paediatric**.
- If enabled by the system administrator and the earmould requires a letter to be sent to the client when it is returned, check the **Re-mould** box
- If necessary, enter comments in any of the 4 comment fields.

*Comments on mould(s) box will be printed  
on the earmould label.*

- If required, enter **Ventilation channel** characteristics, and **Sound channel** width and length
- If left mould is the same as right mould, check **Copy right to left** to copy all characteristics of the right mould to the left mould.
- Click **Save**.
- An automatic identification number for the earmould will now be added by the system. This feature can be disabled by the system administrator, and manual identification numbers can be added.
- If there is a need to review client's waiting list entries while filling earmould details, click **Waiting list entries** button.

## 11.2 Entering information to show the earmould has been sent to the manufacturer

This can be done when entering earmould details:

- Enter the date in the **Sent to manu** box.
- Click **Save**.

Date of impr.	Sent to manu.	Ready	Issued
10/01/2020	<input type="text"/>	<input type="text"/>	<input type="text"/>
LEFT			
Mould	<input type="text"/>	No.	<input type="text"/>

If this is done at a later date, for instance if the moulds are sent off in batches:

- **Navigation -> Earmoulds.**
- Click the **Earmould list** button.
- Enter the required date range.
- Click **Show**.

Right No.	Left No.	Date of imp.	Sent to manu.	Date ready	Hospital no.	NHS no.	Client name
		09/01/2020	09/01/2020	09/01/2020	4084432		MS. 1 1
		09/01/2020			T1120		MRS FIRSTNAME120 LASTNAME120
		11/10/2019	09/01/2020	09/01/2020	4084432		MS. 1 1
		11/10/2019	11/10/2019	09/01/2020	4084432		MS. 1 1
		21/08/2019			Q222222		Father Test firstname Test surname
		29/07/2019			T15825		MRS FIRSTNAME5825 LASTNAME5825
125	126	13/03/2019	13/03/2019		R897596	9589544444	Mr. XXXXXXXXXXXXXXXXXXXXXXXXXXXX CL
789		03/07/2018	03/07/2018	03/07/2018	D568978	5555555555	Mr. test df_1
		14/06/2018			T146087		MRS FIRSTNAME46087 LASTNAME460
		14/06/2018			T111190		MR FIRSTNAME11190 LASTNAME11190
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
2	22	14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/03/2018	14/03/2018				* CLIENT PERMANENTLY DELETED *

- Double-click on the appropriate client.
- Click on **Sent to manu.** and enter the date.
- Click **Save**.

## 11.3 Entering information that the mould has been returned from the manufacturer

- **Navigation** -> **Earmoulds** and click **Search**.
- Enter the earmould number from the earmould label.
- Click **Search**.
- Highlight the appropriate client name.
- Click **Select**.
- Double-click on the **Ready** box. The current date is automatically entered. If set up by the System Administrator, an Automatic Journal Entry will be entered into the Journal.
- If the **Re-mould** box was checked, the send letter window box automatically opens and you can select the appropriate letter to send to the client.
- If the **Re-mould** box was not checked, click on **Save**.
- If you want to put the client on a waiting list, use the **Waiting list** button at the top of the screen.
- Or you can close the earmould page and book an appointment for the client in the booking screen.

### 11.3.1 Booking back multiple Earmoulds

- Open the Earmould List and run the search based on earmoulds which have not been marked as Ready. This is done by selecting the **Not Ready** box and then clicking **Show**.
- Select the earmoulds which are to be returned by clicking to the left of the **Right No.**

Right No.	Left No.	Date of imp.	Sent to manu.	Date ready	Hospital no.	NHS no.	
		09/01/2020	09/01/2020	09/01/2020	4084432		MS. 1 1
		09/01/2020			T1120		MRS FIRSTNAME120 LASTNAME120
		11/10/2019	09/01/2020	09/01/2020	4084432		MS. 1 1
		11/10/2019	11/10/2019	09/01/2020	4084432		MS. 1 1
		21/08/2019			Q222222		Father Test firstname Test surname
		29/07/2019			T15825		MRS FIRSTNAME5825 LASTNAME58
125	126	13/03/2019	13/03/2019		R897596	9589544444	Mr. XXXXXXXXXXXXXXXXXXXXXXXXXX
789		03/07/2018	03/07/2018	03/07/2018	D568978	5555555555	Mr. test df_1
		14/06/2018			T146087		MRS FIRSTNAME46087 LASTNAME4
		14/06/2018			T111190		MR FIRSTNAME11190 LASTNAME11
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
2	22	14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/03/2018	14/03/2018				* CLIENT PERMANENTLY DELETED

- Select **Fill Ready date**

Earmould list

Paediatric  Adult Print Close

Date of impression:  to 10/01/2020 Earmould centre number:

Date ready:  to   Not ready  Filter on code

Select all Show Select Fill ready date

Right No.	Left No.	Date of imp.	Sent to manu.	Date ready	Hospital no.	NHS no.	
		09/01/2020	09/01/2020	09/01/2020	4084432		MS. 1 1
<input checked="" type="checkbox"/>		09/01/2020					MRS FIRSTNAME120 LASTNAME120
		11/10/2019	09/01/2020				MS. 1 1
		11/10/2019	11/10/2019				MS. 1 1
<input checked="" type="checkbox"/>		21/08/2019					Father Test firstname Test surname
<input checked="" type="checkbox"/>		29/07/2019					MRS FIRSTNAME5825 LASTNAME5825
125	126	13/03/2019	13/03/2019			4444	Mr. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
789		03/07/2018	03/07/2018	03/07/2018	D568978	5555555555	Mr. test df_1
		14/06/2018			T146087		MRS FIRSTNAME46087 LASTNAME46087
		14/06/2018			T111190		MR FIRSTNAME11190 LASTNAME11190
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
2	22	14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/06/2018	14/06/2018	14/06/2018	T1120		MRS FIRSTNAME120 LASTNAME120
		14/03/2018	14/03/2018				* CLIENT PERMANENTLY DELETED

- Insert the date you wish to identify as the date earmoulds were ready and then select **Save**. **Note:** The date will automatically populate with the date on the PC calendar.

## 11.4 Viewing a client's previous earmould impressions

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation -> Earmoulds.**
- From the **Earmoulds** drop-down list, select the date of impression you want to view from the list.
- All details of this earmould will now appear on screen.

X
Earmoulds - MRS FIRSTNAME2278 LASTNAME2278

Search Print Label Earmould list Waiting lists entries Print stat.  Open with latest Close

Client

Hospital no. **T12278**      Name **MRS FIRSTNAME2278 LASTNAME2278**      Comments on client

Transport

Earmoulds  Delete New Save

Moulds	Date of impr.	Sent to manu.	Ready	Issued
<input type="checkbox"/> Copy r	6, 15/06/2009			
	5, 30/12/2008			
	4, 26/06/2007			
	3, 06/04/2004			
RIGHT	2, 27/06/2002			
Mould	1, 11/04/2000			

Re-mould      10/01/2020 + -

RIGHT

LEFT

No.  Mould  No.

## 11.5 Attaching audiograms to printouts

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation -> Earmoulds.**
- Select the appropriate earmould by selecting date from the earmoulds drop-down list at the top of the page.
- Select an audiogram in the drop-down list.
- Click **Save**.
- Select **Print**.

## 11.6 Earmould barcodes

In the Earmould module you can search for an earmould either by user input or with a barcode scanner. When using the barcode scanner, a unique earmould barcode is needed. This barcode can be printed out from Auditbase, if so set up in Auditbase system administration.

- Click on **Label** in the Earmould module.
- A label will be printed followed by a barcode if so configured by your system administrator.

Client name: MRS FIRSTNAME1966 LASTNAME1966

Hosp No: T11966 NHS No:

Impression date: 10/18/2010

Barcode (not transformed): &!101018-7724

Barcode (transformed):



- The label contains information concerning the patient’s earmoulds such as the earmould numbers, type of earmoulds, as well as a hospital number and the audiologist who has worked on the patient. Comments and notes can also be added to the label.
- Once the barcode has been printed, use a barcode scanner to find the earmould in Auditbase System.

✕
Search earmoulds

Search Select Close

Earmould number:     Earmould centre number:

Clients found:  Filter on code

Hospital no.	NHS no.	Name	Date of im <sup>^</sup>
T14438		MRS FIRSTNAME4438 LASTNAME4438	30/03/20
T14438		MRS FIRSTNAME4438 LASTNAME4438	30/03/20
T14438		MRS FIRSTNAME4438 LASTNAME4438	30/03/20
T999444	1233211233	Father Tname Fname	28/03/20 <sup>^</sup>

<
>

## 12 Paediatric Module

*Click the button below to access our training materials.*

eLearning

The module contains information related to a client defined as a child or young person. The module is only accessible when you have selected a client whose age corresponds to the limits set up by the system administrator.

To access the module, go to **Navigation** area -> **Paediatric** or press **Ctrl+Shift+P**.

When either **Client search (F3)** or **Client quick search (Ctrl+F3)** is activated from the Paediatric module, it is only possible to create a new paediatric case for a person below the age limit defined by the system administrator.

If a client aged below the limit is selected, you can add or modify paediatric information. If the client does not have an existing paediatric record, the paediatric module is left empty and you cannot enter or save data.

When merging clients that have a Paediatric Module record, only the record belonging to the Major will be retained after merging. Please ensure you have copied all important data from the Paediatric Module record of the client to be merged into the Paediatric Module record of the Major client before merging.

## 12.1 Entering data in the Paediatric module

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Paediatric**, or press **Shift+Ctrl+P**.

*To create a new Paediatric record for a client the client must be aged below the limit set by the system administrator.*

- Using the tabs at the top of the screen enter the data required in each field.
- The tab to be presented at start-up is defined by the system administrator.
- Auditbase will prompt you to save information as you leave each tab or the module.

### 12.1.1 Contact Information

The information in the **Contact** tab is meant to give a quick overview of relevant contacts for the child.

The screenshot shows the 'Contact information' tab selected in a software interface. The form is organized into two main columns. The left column includes:
 

- Consent to share information with education: Yes, No, Withdrawn, Refused checkboxes.
- Consent to share information with social services: Yes, No, Withdrawn, Refused checkboxes.
- Consent comments: A large text area.
- HV / SHN: A dropdown menu.
- HV / SHN comments: A text area.
- Key worker: A dropdown menu.
- Key worker comments: A text area.
- Audiologist: A dropdown menu.
- Community paediatrician: A dropdown menu.
- SALT: A dropdown menu.

 The right column includes:
 

- GP: A dropdown menu showing 'REGISTERED PRACTICE, HOMETOWN SURGERY, NORTH SWINDON'.
- GP comment: A text area.
- ENT consultant: A dropdown menu.
- TOHI: A dropdown menu.
- Head of TOHI service: A dropdown menu.
- School contact: A dropdown menu.
- Child development centre: A text area.
- Play group: A dropdown menu.
- Nursery school: A dropdown menu.
- School: A dropdown menu.
- School type: A dropdown menu.

The information on this tab is a combination of drop-down lists and free text. The content of the drop-down lists can be edited in the following way.

- Right-click on the drop-down arrow of the fields you want to edit.
- Click **New**.
- Add the required name for the **Text** box.
- Click **Apply**.
- Click **Close**.
- The required name will now appear in the drop-down list and can be selected via clicking.

The fields that are edited in this way are: **TOHI** (Teacher of the Hearing Impaired), **Head of TOHI**, **SALT** (Speech and Language Therapist), **Community Paediatrician**.

- **Audiologist** is a drop-down list of the users on the system.
- ENT Consultants and School Information are added from lists.
- The ENT Consultant may be transferred from the Client Information screen if configured to do so by your System Administrator. Any change here may affect the ENT Consultant in the Client Information module.
- Click on the button at the end of the field and select the required option:
- **Create new** allows you to add a new referring agent, for instance a school, doctor or health visitor. Fill in the referring agent screen as required.
- **Select all** opens the search window, where you can enter search criteria. Highlight the referring agent you wish to select and double-click or select to add them to the client record.
- **Select from list** opens the search window and automatically displays all agents. Highlight the referring agent you wish to select and double-click or select to add them to the client record.
- **Clear field** removes the currently selected referring agent from the client record.
- Change to the information is saved to the database by clicking **Save** from the **File** menu or pressing **Ctrl+S**.

### 12.1.2 Referral information

A dynamic overview of referrals through time is obtained from this tab listing date, agent, reason(s) and notes.

Date	Agent	Agency	Reason
02/21/2008	* AA-CHECK GP		++Patient self referral
02/27/2008	* AA-CHECK GP		.AUDIOLOGY referral

Contact information | Referral information | Audiogram | Risk analysis | Consultations | PCHI | Clinical inf.

Previous referrals

Date of referral : 02/21/2008

Referring agent : \* AA-CHECK GP, PLEASE REQUEST GP NAME

Referring agency :

Referral reason : ++Patient self referral

Information : concerns with S+L

Reason for beginning :

Reason for ending :

Episodic conclusion :

The drop-down lists for **Reason for beginning** and **Reason for ending** are defined by the system administrator.

Previous referrals are listed in the box. Click on the referral to see the information. This tab is a combination of drop-down lists and free text.

- Select the reason from the **Referral reason** drop-down list.
- Select other referral reasons from the **Reason for beginning** and **Reason for ending** drop-down lists.
- Enter further information in the text boxes.
- Referring agent and Referring agency are added from lists.
- Click on the button at the end of the field and choose the option required, see Contact information for further information on how to enter data.
- Selecting **New referral** from the **Functions** menu and entering information in the fields followed by saving, will store a new referral to the database.
- Selecting a referral from the list of previous referrals followed by selecting **Delete referral** from the **Functions** menu removes the referral from the database.
- Changes to the information are saved to the database by clicking **Save** from the **File** menu or pressing **Ctrl+S**.

### 12.1.3 Audiogram

Audiograms entered in the system are displayed in the Audiogram list box.

Contact information Referral information **Audiogram** Risk analysis Consultations PCHI Clinical inf.

Audiogram list

3/26/2018, nr. 1  
 10/12/2015, nr. 1  
 10/8/2015, nr. 1  
 9/24/2015, nr. 3  
 9/24/2015, nr. 2  
 9/24/2015, nr. 1  
 2/10/2009, nr. 1

NORMAL

Symbol

AC  
 AC MASKED  
 BC UNMASKED  
 BC MASKED  
 UCL UM  
 MCL UM  
 SF  
 SF M  
 R IPSY  
 R CONTRA

HL SPL dB(A)

Audiogram	125	250	500	750	1000	1500	2000	3000	4000	6000	8000
3/26/2018, no. 1											
AIR NORMAL, RIGHT	40	40	40	40	40	40	40	40	40	40	40
BONE NORMAL, RIGHT		65	65	65	65	65	65	65	65		
AIR NORMAL, LEFT	35	35	35	35	35	35	35	35	35	35	35
BONE NORMAL, LEFT		50	50	50	50	50	50	50	50		

Comments

- To view an audiogram, click on the date to display it numerically.
- To enter a new audiogram, click on the symbol required on the left-hand side of the screen and type the numeric values in the audiogram table.
- Various tests, VRA, ABR, SSEP and Distraction can be entered.
- These tests result in audiogram thresholds for the frequencies using HL, SPL or dB(A) calibration.
- Each special test (with a set of thresholds) will be interpreted as an audiogram curve with its own corresponding symbol set in the audiogram module. Before a curve can be entered as new, calibration must be selected.
- All values are converted into HL before they are stored in the database structure.
- The curve type **Estimated audiogram** is a type that does not refer to a specific test. The intention is that the audiologist determines the thresholds for the estimated audiogram by viewing the values from the obtained special tests.
- The values for the estimated audiogram can then be entered as HL, SPL or dB(A) calibrated thresholds. All thresholds must be entered using the same calibration.
- When an estimated audiogram is saved, it is stored in the database structure as a pure-tone normal audiogram with a hard-coded note (10) on each threshold. This results in an audiogram that can be used in Noah for hearing instrument fitting, see [How to enter into Noah](#)
- The audiogram information can be viewed in **Table** or **Graph** mode so instead of entering thresholds as numerical values, the graphical display can be used as well. Choose the mode from **View -> Table mode** or **Graph mode**. The functionality is similar to the Audiogram module. By highlighting the dates in the **Audiogram list** box, you can decide which audiograms to view in both modes.
- Values can be entered in HL, SPL or dB(A).

- In both the tabular and graphical view, the audiogram can be viewed from the audiogram module and all other places where the audiogram is present.
- In both layouts, the mean values for 500, 1k, 2k Hz or 500, 1k, 2k, 4k Hz are displayed.
- Changes to the information are saved to the database by clicking **Save** on the screen, from the **File** menu or pressing **Ctrl+S**.

*Note: If a new audiogram is chosen the client cannot change the audiogram mode to graph. If the client is on graph mode then selecting a new audiogram is not possible.*

### 12.1.4 Risk Analysis

From the **Risk Analysis** tab, the user can enter risk parameters from observations about the child explaining the hearing problem.

Where some of the fields require predefined input, the date fields are automatically filled with dates retrieved from the database. Each saving of risk information retrieves the system date from the database to update the **Last updated** field. The **Date of birth** field is retrieved from **Client information/Date of birth**.

**Newborn hearing screening test** and **Health visitor distraction test** can be unchecked or checked to indicate whether the child passed the test, has been referred for further or testing has not been performed at all.

Information to be filled is the child's **Weight at birth** in kilograms, **Hearing status**, **Operations**, **Family history**, **Parental concern**. Both **Risk factors** and **Confirmed syndromes** can be added

by clicking **Add/Remove** and selecting appropriate items in the lists of those defined via the System Administration tool -> **Paediatric definitions** -> **Risk factors** -> **Syndromes**.

All selections and texts can be corrected and updated to the database reflected in the **Last updated** field.

Changes to the information are saved to the database by clicking **Save** from the **File** menu or pressing **Ctrl+S**.

The drop-down lists for **Syndromes** and **Risk factors** are defined by the System Administrator.

### 12.1.5 Consultations

This tab is used to write information related to each of the child's visits to the clinic. The child can have several consultations, so with all the information on these tabs referring to a consultation, the user can enter information about future consultations and also view information from past consultations.

For onward referrals, use the *Onward referrals and reporting* module.

The screenshot displays the 'Consultations' tab within a software application. At the top, there are navigation tabs: 'Contact information', 'Referral information', 'Audiogram', 'Risk analysis', 'Consultations' (selected), 'PCHI', and 'Clinical inf.'. Below these is a 'Visits' table with the following data:

Date	Time	Symbol	Status	Resource
03/29/2018	12:00	☐	*	Travy
03/23/2018	12:15	☐	S	Charlie
03/23/2018	16:15	☐	S	Charlie
10/10/2015	10:15	☐	*	Travy
10/09/2015	9:45	☐	*	Travy
02/10/2009	10:00	☐	S	Res82
01/06/2009	11:45	☐	S	Res82

Below the table are several form sections for recording consultation details:

- General development:** Radio buttons for Normal, Delayed, and Not ascertained.
- Speech/language development:** Radio buttons for Normal, Delayed, and Not ascertained.
- Snorer/mouth breather:** A text input field.
- Colds:** A text input field.
- School advice given:** Radio buttons for Yes and No.
- Information to family:** A text input field.
- Otolgia:** A text input field.
- Otorrhoea:** A text input field.
- Aetiology:** A text input field.
- Otoscopy:** A text input field.
- Operation:** A text input field.
- Care plan - post consultation:** A text input field.
- Onward referrals:** A section with a note: 'Please use the Onward referrals and reporting screen'.

**Date** and **Time** of each consultation is automatically transferred from the appointment book, with the name of the resource with whom the appointment is scheduled.

Updating the information of a consultation is done by selecting the appropriate date and time from the list which enables the fields to be filled with information on the tab.

Free text can be added to respective fields:

- Snorer/mouth breather
- Colds
- Otagia
- Otorrhea
- Aetiology
- Otoscopy
- Operation
- Information to family
- Care plan – post consultation
- The appointment is booked by selecting this in the Functions menu and filling in information in the appointment dialog (Booking).

Also from the **Functions** menu, a consultation can be deleted once it has been selected from the list.

Changes to the information are saved to the database by clicking **Save** from the **File** menu or pressing **Ctrl+S**.

### 12.1.6 PCHI (Permanent Childhood Hearing Impairment)

By entering the date of the first appointment, observations and procedures and hearing instrument issue in the date boxes and pressing TAB, Auditbase will calculate the **Age in months** at these stages for you. Auditbase uses the date of birth entered in the client information module to make these calculations.

Contact information	Referral information	Audiogram	Risk analysis	Consultations	PCHI	Clinical inf.
<b>First audiology professional</b>		<b>Average of .5,1,2,4 kHz better ear</b>				
Date	<input type="text" value="02/14/2005"/>	<input type="text"/>				
Age	<input type="text" value="0 Year(s) 1 Month(s) 27 Day(s)"/>	<b>Notes</b>				
<b>Diagnosis</b>		<input type="text"/>				
Date	<input type="text" value="03/15/2007"/>					
Age	<input type="text" value="2 Year(s) 2 Month(s) 25 Day(s)"/>					
<b>Hearing aid issue</b>						
Date	<input type="text" value="04/27/2012"/>					
Age	<input type="text" value="7 Year(s) 4 Month(s) 9 Day(s)"/>					

Free text can be filled in for the average of .5, 1, 2, 4 kHz in the better ear and notes.

Changes to the information are saved to the database by clicking **Save** from the **File** menu or pressing **Ctrl+S**. Changes to any of the fields are made by correcting dates or text and saving to the database.

### 12.1.7 Clinical information

This tab presents an overview of the client’s clinical status. Sorted by date, the medical condition, investigations and immunisations are listed in the three tables.

Contact information	Referral information	Audiogram	Risk analysis	Consultations	PCHI	Clinical inf.
---------------------	----------------------	-----------	---------------	---------------	------	---------------

Significant medical conditions / illnesses			
Date	ICD 10	Description	
11/28/2018	127	Test observation	

Investigations			
Date	Investigation	Result	
11/29/2018	High Freq Tymp		

Vaccinations & Immunisations		
Date	Immunisation	

- To add information, double-click a row in the table.
- Enter new clinical information or delete existing information in the window box.
- The system date is given to the date field by default and from the drop-down box you can select between the clinical information defined by the system administrator in the Administration tool.
- Changes to the information are saved to the database by clicking **Save** from the **File** menu or pressing **Ctrl+S**.
- Information is deleted by double-clicking the respective entry in the table and pressing **Delete** in the dialog box.

### 12.1.8 Deleting Paediatric information

When paediatric information for a client needs to be deleted from the database, **Delete** from the **Edit** menu holds this function and the user is warned that carrying out this action cannot be undone.

Pressing **Yes** to the security question erases all paediatric information for the client from the database.

Pressing **No** ends the deleting session without erasing paediatric information for the client from the database.

## 12.2 Paediatric review report

To access this report in the Paediatric module:

- Select **View** -> **Paediatric review report**.
- Select **unaided audiogram**.
- Select **aided audiogram**.
- Hearing instrument information is taken automatically from the client's device list.
- Enter hearing instrument details.
- Click **Print**.

Paediatric review report / MR JOHN SMITH (T18765) ✕

Number of copies to print

Select unaided audiogram

Select aided audiogram

Hearing Aids

Type right

Type left

	Right	Left
User volume	<input type="text" value="23"/>	<input type="text" value="20"/>
Settings	<input type="text"/>	<input type="text"/>
Serial number	<input type="text" value="1234432"/>	<input type="text" value="1234433"/>

Audiologist  ▾

Conclusion

TOHI  Community Paediatrician

ENT  SALT

## 12.3 Printing

You can preview or print a full report of the information you have entered in the Paediatric Module.

- Select **File** -> **Print** or press **Ctrl+P**.
- Select which pages to print:
  - Print all
  - General paediatric information (Family + Contact information)
  - Referral information
  - Audiogram
  - Consultation
  - Significant medical conditions/illnesses
  - Investigation
  - Immunisation
- A printout will be sent to the default printer.

OR

- Select **Print preview**. A copy of the report will be displayed on screen.
- When **Preview** is presented on screen, the file can be exported to **Format** and **Destination** selected in the **Export** dialog followed by **OK** to carry out selection or return to **Preview** by hitting **Cancel**.

# 13 Stock

Click the button below to access our training materials.

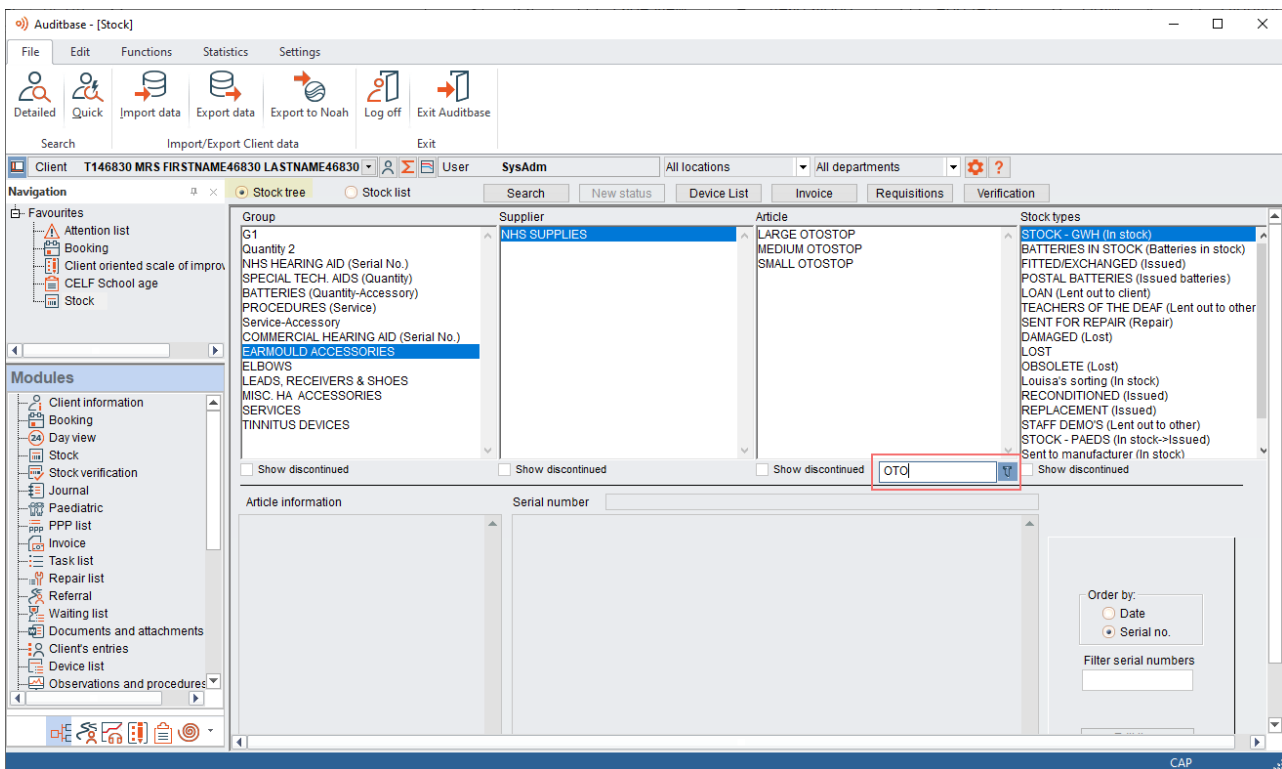


All articles, such as hearing instruments, spare parts and services, can be managed in the **Stock** module.

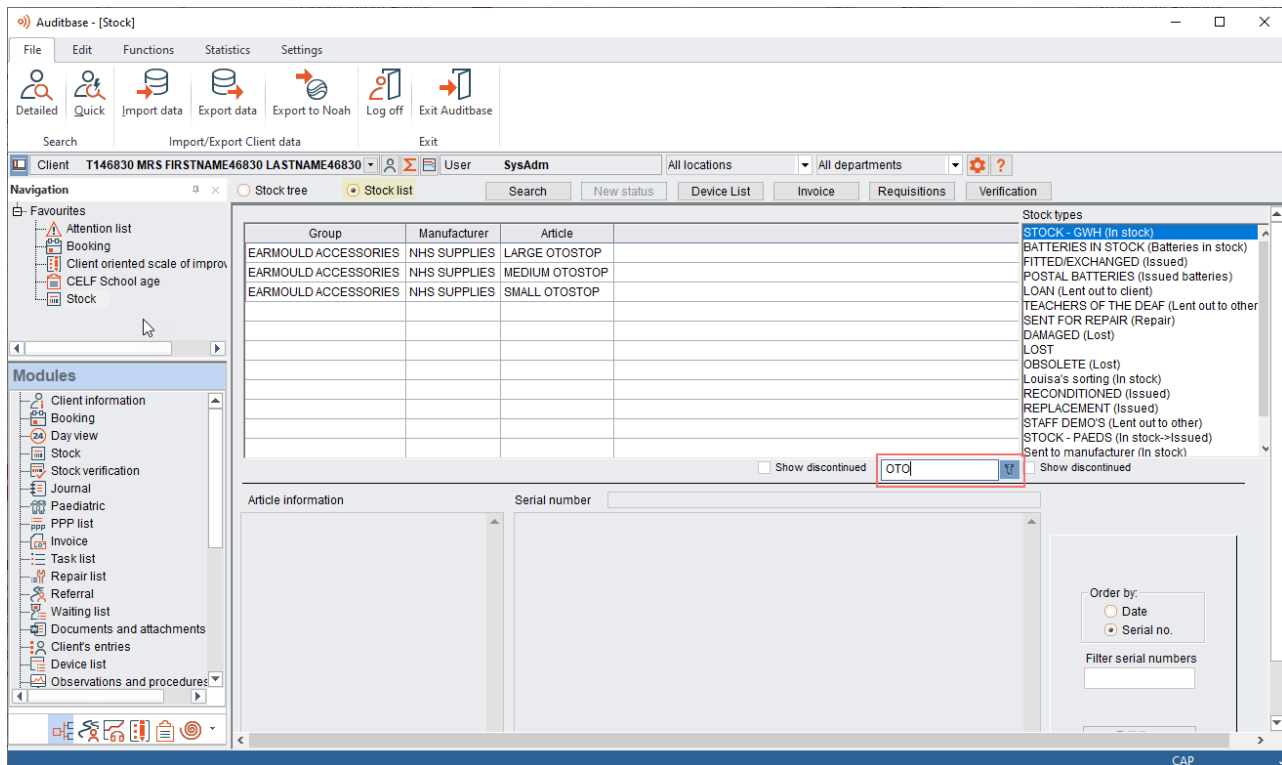
The **Stock** module has relations to invoicing and other additional facilities for purchasing, ordering, repairing, etc.

To open the **Stock** module, select **Navigation -> Stock** or use **Ctrl+Shift+S**.

In the Stock tree view, all devices are shown in the hierarchy *Group/Manufacturer/Article*.



In the Stock list view, you can see all devices in a table.



Auditbase remembers the last opted-for view. When the Stock module is reopened, the view will be in the same mode as it was previously selected by user.

By default, discontinued items are filtered out. They can be included in the list when the "Show discontinued" option is selected.

In the **Filter** field, you can enter any part of the device name and all related items will be displayed. In the Stock tree view, the search is conducted within the chosen Group and Supplier. In the Stock list view, the search is comprehensive and the output will include items from all Groups and Suppliers.

In the upper section the **Stock** module lists the **Group**, **Manufacturer**, **Article**, and **Stock type** that are used for selecting the specific item to work with.

Selections are made from left to right over the available lists:

## Group

Contains definitions of for example hearing instruments, spare parts, accessories and services. Groups are defined by the System Administrator. Each group is managed and identified by Serial no. or as Quantity or Service.

Depending on the group selected in the list, the displayed information in the lower part of the screen will change. For example, selection of a serial number controlled group will show **Article Information**, **Order by** and **Search**. Selection of a quantity controlled group will show **Article**

**Information and Items found.** Selection of any group identified as service shows **Service Information**.

### Manufacturer

Shows the manufacturers of articles of the group selected in **Groups**. For example, for the **Hearing instruments** group, the list can contain manufacturers as Auditdata, Widex, and Oticon etc. A new manufacturer can be added or existing manufacturers modified, when the group is selected, from the menu **Functions -> Settings -> Manufacturers**.

### Article

Lists the sub-category of **Manufacturer**. For example, for **Hearing instruments**, the Auditdata manufacturer, the **Article** list contains stock articles produced by Auditdata. Articles are defined in **Functions -> Settings -> Articles**.

### Stock type

Identifies the physical location or current status of an item. For example, when a supply of articles is delivered, the new purchased items should be registered as **In stock**.

Changing a stock type for an article implies that an article has moved from being **In stock** to being **Issued to client** or maybe temporarily **For repair** from the status **Issued to client**. The same applies to other stock types for example Spare parts.

*NOTE: Changes in the status of items create clinical actions. If you have attached them to appropriate appointments, they can be seen on the **Clinical actions** tab of the **Referral** module.*

Stock types are defined by the System Administrator.

For a quantity controlled group, items can be deleted no matter which stock type status they have.

### Miscellaneous

The headings for **Manufacturer** and **Article** can be defined by the System Administrator. For example, you can see that for Spare parts, the heading for the lists changes to **Type** and **Series**.

Any selected article shows **Article information** with product ID, quantity ordered, type, codes, prices and discount, supplier and supplier article number and if you have selected a group identified serial number, you will also see a version number.

Information about external and internal product codes, lowest stock level, lowest stock level at bulk buy or collective purchasing, type, version, etc. can be attached to an article.

If an HI has the status **Lent by employee**, you will see the employee's name under the Article information, when the article is selected in the main Stock window.

Read more about the Stock module in the following chapters.

## 13.1 New status

To change the status of an item, select a group, manufacturer, article and stock type. Find the item and click **New status**. In the opened **New Status** dialog, select the new stock type, specify the required details and press **Save**.

*Note: The status of devices and accessories can also be changed from the Devices tab of the Client Information module.*

The screenshot shows a dialog box titled "New status for serial number: 11233445. NHS SUPPLIES, ITE11MR". The dialog has a "Client" field with "MR. JOHN SMITH" and buttons for "Print Settings", "OK", and "Cancel". The main area is divided into several sections:

- From stock type:** A dropdown menu showing "STOCK - GWH (In stock)".
- Location:** A dropdown menu showing "All locations".
- To stock type:** A list of stock types, with "FITTED/EXCHANGED (Issued)" selected. Other options include "LOAN (Lent out to client)", "TEACHERS OF THE DEAF (Lent o)", "SENT FOR REPAIR (Repair)", "DAMAGED (Lost)", "OBSOLETE (Lost)", "Louisa's sorting (In stock)", "RECONDITIONED (Issued)", "REPLACEMENT (Issued)", "STAFF DEMO'S (Lent out to other)", "STOCK - PAEDS (In stock->Issued)", "Sent to manufacturer (In stock)", and "UNTRACEABLE (In Stock)".
- Article name:** "ITE11MR".
- Ear:** Radio buttons for "R" (selected), "L", and "N/A".
- Date:** "28/11/2022".
- User:** "SYSTEM ADMINISTRATOR".
- Price:** "£58.14".
- Invoice type:** "Invoice type 1".
- Reason to issue:** A dropdown menu.
- Item information:** "333".
- Invoice:** Radio buttons for "to customer" and "to client" (selected).

If the change of stock type is the issuing of an instrument, the instrument will be given the status **Issued** and this will be registered for the selected client. Simultaneously the issue is registered for invoicing.

If so configured by your System Administrator, it might be mandatory to select the **Reason to issue** (used especially in Denmark). The reasons are listed by a four-digit code using letters and numbers. They are sorted alphabetically in order to make the selection easier. No other priority sorting is supported. You can select the code by using number and letter keys on your keyboard, when the drop-down list is selected. Each key press will select the next character in the code. Once selected, the **Reason to issue** code will then be shown on each posting related to this type of issue and inside the invoices.

All changes of status will be registered in the history of the item which is displayed via the menu **Functions -> History**.

In addition, changes of status automatically create clinical actions, namely:

- When the new stock type of a device is of the Issued category and its current stock type is not of the **Repair** or **Lost** category, a clinical action of the **Issue article** type will be created, meaning that the device is issued to the client.

- When the new stock type of a device is of the **Issued** category and its current stock type is of the **Repair** category, a clinical action of the **Issue article from repair** type will be created.
- When the new stock type of a device is of the **Issued** category and its current stock type is of **Lost** category, a clinical action of the **Issue article from lost** type will be created.
- When the new stock type of a device is of the **Lent out to client** category, a clinical action of the **Lend out article** type will be created.
- When the new stock type of a device is of the **In stock** category, and the device is associated with the client before this transaction meaning that the current stock type is either of the **Issued** or **Lent out to client** category, a clinical action of the type **Return article to stock** will be created.

*NOTE: A device can be moved to stock directly from another stock type, or from a stock type of the **Lent out to other** category, or from the **Repair** category. However, in such cases there is no client associated with the device, and a transaction like this will not be a clinical action.*

- When the new stock type of a device is of the **Repair** category, and the device is associated with the client before this transaction meaning that the current stock type is either of the **Issued** or **Lent out to client** category, a clinical action of the **Return article to repair** type will be created.

*NOTE: A device can be sent to repair directly from stock. In such a case, the current stock type is of the **In stock** category and there is no client associated with the device. Therefore, a transaction like this will not be a clinical action.*

- When the new stock type of a device is of the **Lost** category, and the device is associated with the client before this transaction which means that the current stock type is either of the **Issued** or **Lent out to client** category, a clinical action of the type **Record lost article** will be created.

*NOTE: A device can be registered as **Lost** if it is currently not associated with a client. A transaction like this will not be a clinical action.*

The **New Status** dialog can also be called by scanning a barcode of a device already registered in the system.

When a new status is selected you can change the **Print settings** for each status.

Default print setting for 'FITTED/EXCHANGED (Issued)'

Clear Print Preview OK Cancel

Headline text

test headline

Print article price      Number of copies 0

Print supplier data

Print addressee

Client

Supplier

Body text

Test 2

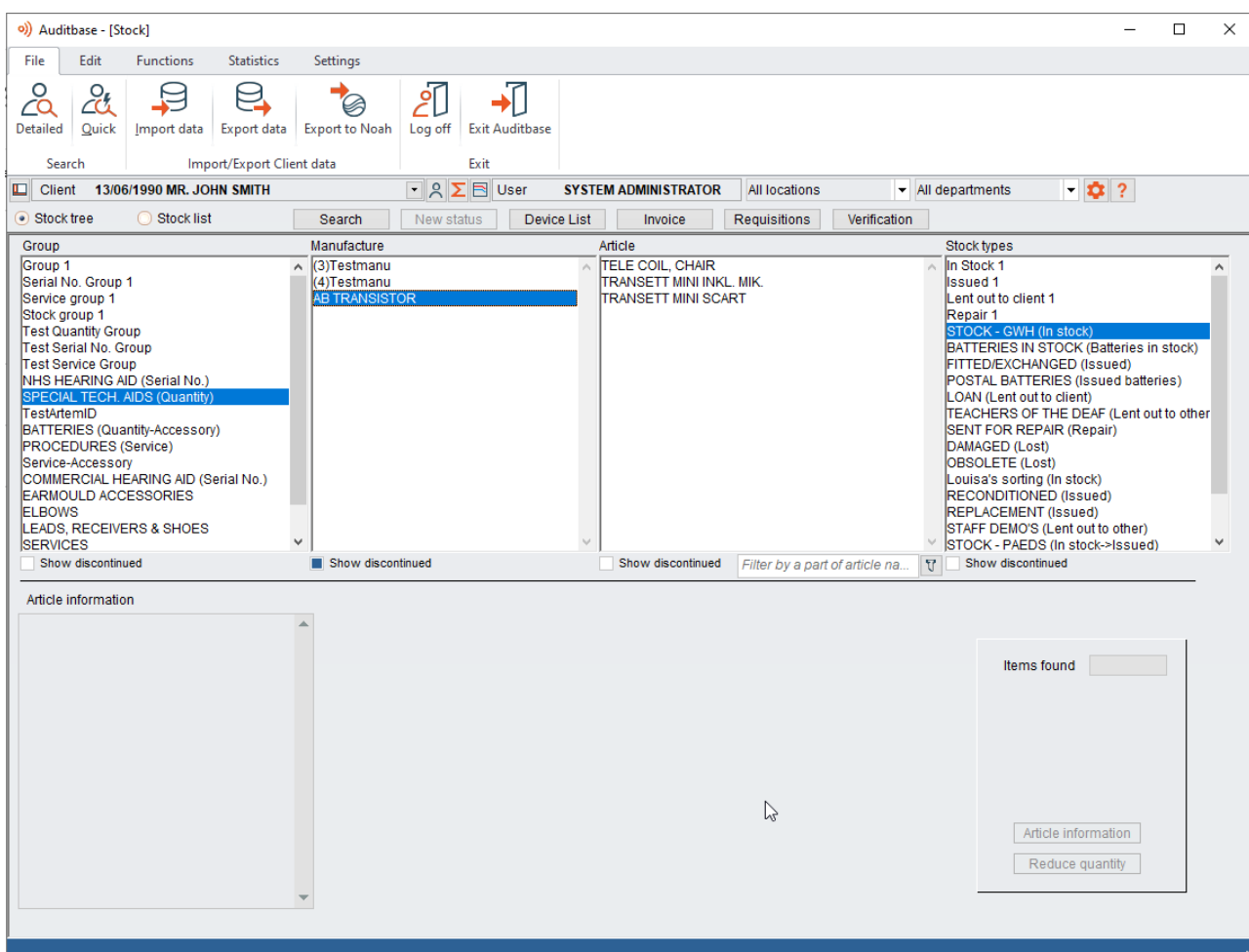
Lower body text

Test 3

*NOTE: If you have attached clinical actions to appropriate appointments, such clinical actions can be seen on the **Clinical actions** tab of the **Referral** module.*

## 13.2 Issuing a quantity controlled hearing instrument from stock

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Select **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Select **Group**.
- Select **Supplier**.
- Select article/instrument type.
- Select the current stock type for the instrument, for instance Stock existing users.
- Click **New status**.
- Select the new stock type, for instance **Issued**.
- Select right or left if required.
- Click **OK**.



## 13.3 Issuing a serial number controlled hearing instrument from stock

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Stock** or **press Shift+Ctrl+S**.
- Select the device to be issued by scanning the barcode.

OR

- Select **Group**, for instance, Commercial hearing aid.
- Select **Supplier**, for instance, GN Resound.
- Select article/instrument type, for instance, Danalogic 283D.
- Select the current stock type for the instrument, for instance, New Stock.
- Enter the serial number of the instrument in the **Filter serial numbers** box.

*It is important that you enter the serial number of the instrument you are going to issue in the **Filter serial numbers** box before you issue the instrument. This will enable tracking of serial number controlled instruments in the system.*

The screenshot shows the Auditbase - [Stock] application interface. The main window displays a list of stock items with columns for Group, Supplier, Model, and Stock types. The 'Supplier' column is expanded to show 'NHS SUPPLIES'. The 'Model' column is expanded to show 'BE101'. The 'Stock types' column is expanded to show 'RECONDITIONED (Issued)'. Below the list, there are checkboxes for 'Show discontinued' and a 'Filter by a part of article na...' field. The 'Article information' section displays details for article ID 50220, including price, supplier, and warranty information. The 'Serial number' section shows 'NBG10068' with its modified date and other details. On the right, there is a 'Filter serial numbers' input field and an 'Edit item' button.

- When the serial number of the device is found, click **New status**.

New status for serial number: NBG09866. NHS SUPPLIES, BE101

Client: MR. JOHN SMITH

Print Settings OK Cancel

From stock type: **STOCK - GWH (In stock)**

Location: All locations

To stock type:
 

- In Stock 1
- Issued 1
- Lent out to client 1
- Repair 1
- FITTED/EXCHANGED (Issued)**
- LOAN (Lent out to client)
- TEACHERS OF THE DEAF (Lent o
- SENT FOR REPAIR (Repair)
- DAMAGED (Lost)
- OBSOLETE (Lost)
- Louisa's sorting (In stock)
- RECONDITIONED (Issued)
- REPLACEMENT (Issued)
- STAFF DEMO'S (Lent out to other)

 Show discontinued

Article name: BE101

Ear:  R  L  N/A

Date: 28/11/2022  Recycled

User: SYSTEM ADMINISTRATOR  HI Satisfaction questionnaire wanted

History comment: [Empty text area]

Price: £43.54

Invoice type: Invoice type 1

Reason to issue: [Empty dropdown]

Item information: [Empty text area]

Invoice:
 

- to customer
- to client

- Select the new stock type, for instance Damaged – your System Administrator can create a default ‘next stock type’ for each Stock type to speed this up.
- Select the right or left ear. **N/A** can be used for articles that are not assigned to a particular side. If **N/A** is selected, it will appear as – in the **Device** list.
- Select the **Invoice type** – your System Administrator can create a default Invoice type for the whole site and for an individual workstation to speed this up.
- Select who to invoice to – your System Administrator can save a default invoice for the whole site and for an individual workstation to speed this up.
- OK.
- If configured by the System Administrator, the system shows a confirmation request.

Stock transaction confirmation

You are going to issue (lent out - in case of lending out) the following stock article:  
**NHS SUPPLIES, BE101, NBG09866**

to the following client:  
**T1625- MR. JOHN SMITH**

Details are the following:

New stock type: **FITTED/EXCHANGED (Issued)**

Side: **N/A** Date: 28/11/2022

Invoice type: **Invoice type 1** Invoice to: **Client: T1625- MR. JOHN SMITH**

Price: £43.54

Return date:

Is the above information correct?

Click Commit to issue (system will make stock transaction)

Click Edit to return to "New status" dialog and change some information

Click Abort to cancel stock transaction

Commit Edit Abort

- **Commit** to issue, **Edit** to edit data, **Abort** to interrupt.

## 13.4 Issuing devices from Stock after fitting in Noah

In order for devices to be issued from Noah once you have properly programmed and fitted the hearing instrument, it is important that you have:

- Correctly selected the new instrument you wish to fit.
- Saved the Noah action.
- Closed the fitting software.

The process reacts on a new or updated saved Hearing Instrument selection action.

In order for the Stock transaction confirmation window to open successfully, you should:

- Ensure Auditbase is NOT minimised to the task bar.
- Ensure Noah is NOT minimised to the task bar.

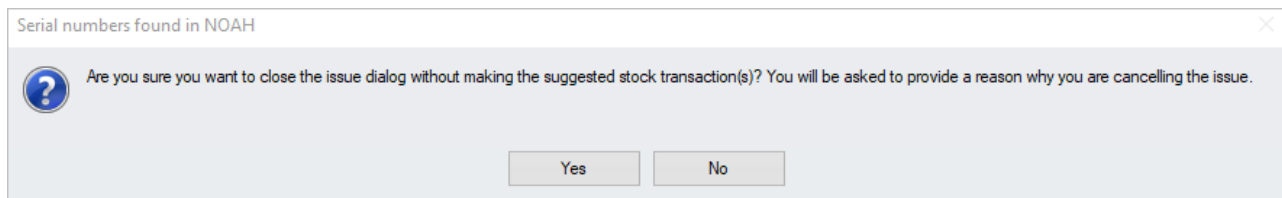
If Auditbase is minimised and you have already saved the fitting process and closed the fitting software, maximise Auditbase again and the confirmation window will appear.

If Noah is minimised, you have already saved the fitting process and closed the fitting software, click on the Audit Base screen and the confirmation window will appear.

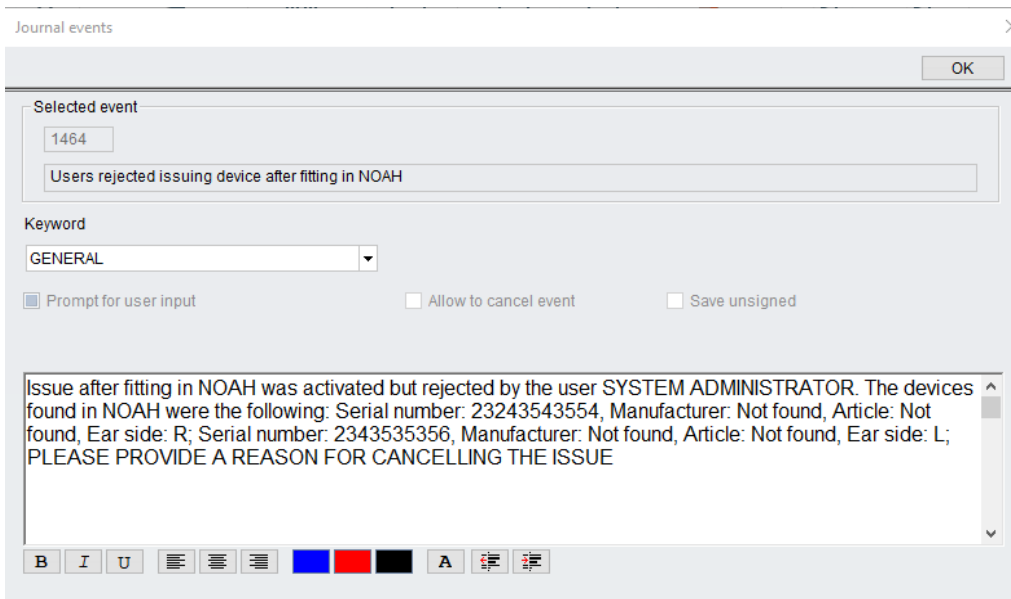
If you close the **Serial numbers found in Noah** dialog without issuing, the dialog will not be displayed by simply connecting to that aid again in the Noah module, a change must be made to the hearing instrument selection in the fitting module and that change saved before the dialog can reappear.

A pop up box will appear when pressing **Close** without having completed the stock transaction when issuing a hearing aid via Noah within Auditbase.

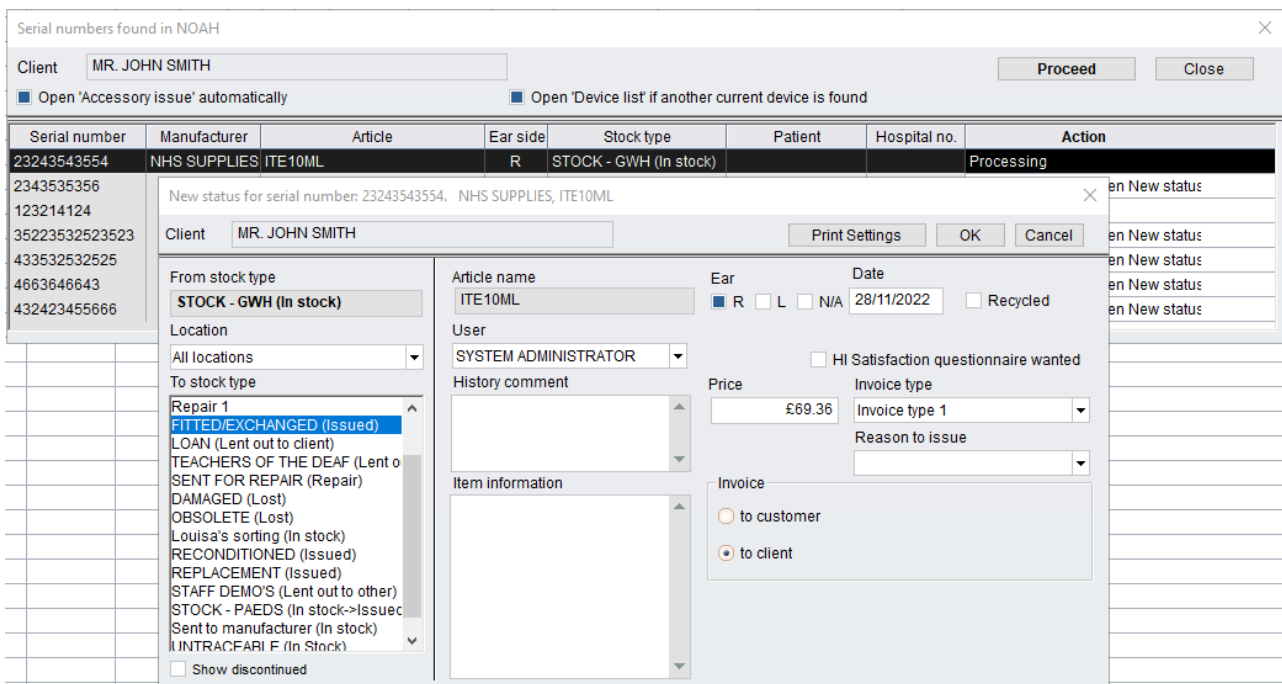
The warning will ask:



If you confirm that you wish to close the issue by selecting **Yes**, an Automatic Journal Event will be fired asking you to provide a reason why the event is being cancelled. This can be configured by your System Administrator.



After closing down Noah, the system may check whether any fitting actions were performed, if so configured by your System Administrator. A list of the articles found will be displayed.



- In the column called **Action**, you can choose what to do with the articles. Place your mouse in the cell and an arrow appears, from where you can choose an action in a drop-down list.
- Once you have chosen actions for all articles found, press 'Proceed', where after all articles are processed one by one.
- The article being processed is now highlighted in the background.

Serial numbers found in NOAH

Client: MR. JOHN SMITH Proceed Close

Open 'Accessory issue' automatically  Open 'Device list' if another current device is found

Serial number	Manufacturer	Article	Ear side	Stock type	Patient	Hospital no.	Action
23243543554	NHS SUPPLIES	ITE10ML	R	FITTED/EXCHANGED (Iss JOHN SMITH)		T1625 -	Processed
2343535356			L	<<Not found>>			Processing

Register for stock -

Stock tree  Stock list Save Cancel

Group	Manufacturer	Articles	Stock types	Serial no.
Group 1	TestArtem	ITE10MR	In Stock 1	2343535356
Serial No. Group 1	otic_23.04.20	ITE10ML	STOCK - GWH (In stock)	
Stock group 1	123456789	ITE11MR	BATTERIES IN STOCK (Batteries in Louisa's sorting (In stock)	
Test Serial No. Group	NHS SUPPLIES	ITE11ML	STOCK - PAEDS (In stock->Issued)	
NHS HEARING AID (Serial No.)		BE101	Sent to manufacturer (In stock)	
TestArtemID		BE101B	UNTRACEABLE (In Stock)	
Service-Accessory		BE101G		
COMMERCIAL HEARING AID (Serial No.)		BE102HF		
EARMOULD ACCESSORIES		BE103		
ELBOWS		BE105		
LEADS, RECEIVERS & SHOES		BE18		
SERVICES		BE19		
TINNITUS DEVICES		BE301		

Show discontinued  Show discontinued

Use alphabetic characters in the sequence for this manufacturer, B, I, O, Q, S and Z will be skipped

Warranty

Purchase date: 28/11/2022  Warranty  months

Expires:  Warranty code: 42

Price	Article ID	Item information												
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Purchase price</td> <td>Discount on purchase</td> <td>Net purchase price</td> </tr> <tr> <td>£58.14</td> <td>-</td> <td>£58.14</td> </tr> <tr> <td></td> <td>Basic profit</td> <td>0.00%</td> </tr> <tr> <td><input type="button" value="Calc."/></td> <td>Sales price</td> <td>£58.14</td> </tr> </table>	Purchase price	Discount on purchase	Net purchase price	£58.14	-	£58.14		Basic profit	0.00%	<input type="button" value="Calc."/>	Sales price	£58.14	50144 Item number Battery: CP41 Colour Version Label Type Interface connection <input type="checkbox"/>	
Purchase price	Discount on purchase	Net purchase price												
£58.14	-	£58.14												
	Basic profit	0.00%												
<input type="button" value="Calc."/>	Sales price	£58.14												

- The above is an example of an article needing a new status.
- The second article in the example is issued to the wrong patient and needs to be issued to the correct patient. This will be done in two steps: return the article to stock and issue the article to the new patient.
- If you try to cancel creating a new status for the article in order to return it to stock, you will be warned that you cannot issue the device without returning it to stock.
- The third article in the example has been set to **Skip (duplicate)** as it is a duplicate of another article.
- The fifth article in the example has been set to **Register for stock, then New status**, since the stock type was **Not found**, and therefore the **Register for stock window** is opened.

Serial numbers found in NOAH

Client: MR. JOHN SMITH Proceed Close

Open 'Accessory issue' automatically  Open 'Device list' if another current device is found

Serial number	Manufacturer	Article	Ear side	Stock type	Patient	Hospital no.	Action
436457457547			R	<<Not found>>			Register for stock, then New status
4574574754747			L	<<Not found>>			Register for stock, then New status
43636463463			R	<<Not found>>			Register for stock, then New status
3464363636436			L	<<Not found>>			Register external item
3264575758758			R	<<Not found>>			Skip
							Register for stock, then New status

- The serial number is filled in automatically.
- Press **OK** and the **New status** window appears.
- Fill out the new status and the article is issued to stock.
- If the patient already has a current serial controlled device for a particular ear, when issuing from Noah, a setting in System Administration may open the device list for returning the old device. This can be set per workstation so should be disabled if a user regularly issues more than one serial controlled device per ear.

*Note: Changes in article status create clinical actions. If you have attached them to appropriate appointments, they can be seen in the **Clinical actions** tab of the **Referral** module.*

## 13.5 Edit item

To change details for an item, open the Edit item dialog by selecting **Edit** -> **Edit item** or clicking **Edit item**.

The screenshot shows a dialog box titled "Edit item - serial no. '444', NHS HEARING AID (Serial No.), NHS SUPPLIES, ITE11MR". At the top right are buttons for "Save", "Delete", and "Cancel". The dialog is divided into several sections:

- Serial no.:** 444
- Purchase price:** £58.14
- Sales price:** £0.00
- Purchase date:** 21/04/2015
- Warranty:**  Warranty Expires
- Article has been recycled:**  Article has been recycled
- Warranty code:** 25
- Interface connection:**  Interface connection
- Item information:** A large text area for additional details.
- Bar code:** A section with "Product ID" (dropdown) and "App. ID" (input).
- User:** full name tests???
- Other fields:** Item number, Battery (CP41), Colour, Type, Label, and Version.

The following item details can be changed:

- Serial number; in this case the system changes the serial number in postings if any for the item. Invoiced postings can also be modified if configured in the Administration tool
- Purchase date if the user has the corresponding right granted
- Purchase and sales prices
- Warranty checkmark and expiration date
- Recycled flag (it is possible to mark a serial number controlled article as **Recycled**. This means that the article has been invoiced already and can be reused for another client. You can mark an article recycled from Item information or when changing the article's status in the New status-dialogue.
- Warranty code (Danish)
- Battery
- Colour
- Version
- Label
- Type
- Interface connection flag
- Item information
- Barcode: select **Product ID** from a Product ID barcode list specified for the article. This ID is used by the system to identify the item by scanning an item barcode.

At the bottom of the dialog, name of the user is seen in read only mode. This is a user who recently performed an action with the item.

- Click **Save** to save the changes.
- Click **Delete** to delete the item from the database. Note that this is only possible for items in stock.

## 13.6 Reduce quantity

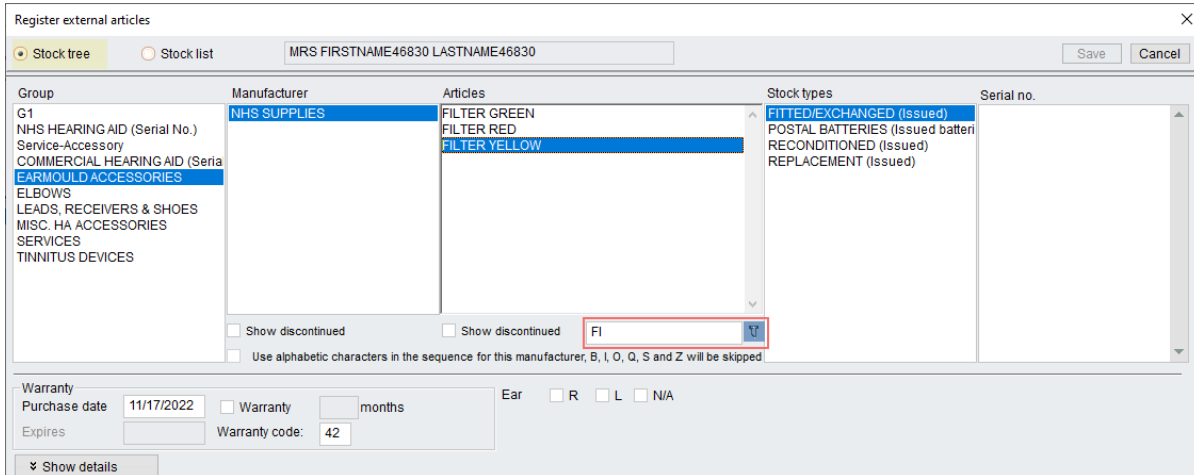
When you have selected a stock group and related manufacturer, article and stock type, the number in that stock type can be reduced. Go to **Edit -> Reduce quantity**.

- The dialog window shows the number of items for the selected article available in selected stock type.
- Enter the relevant number and press **OK** to reduce the number of items.
- Deletion must be confirmed before it is complete.
- The stock group must be defined as **Quantity** type from the **Administration tool -> Stock definitions -> Stock group** for this option to be enabled.

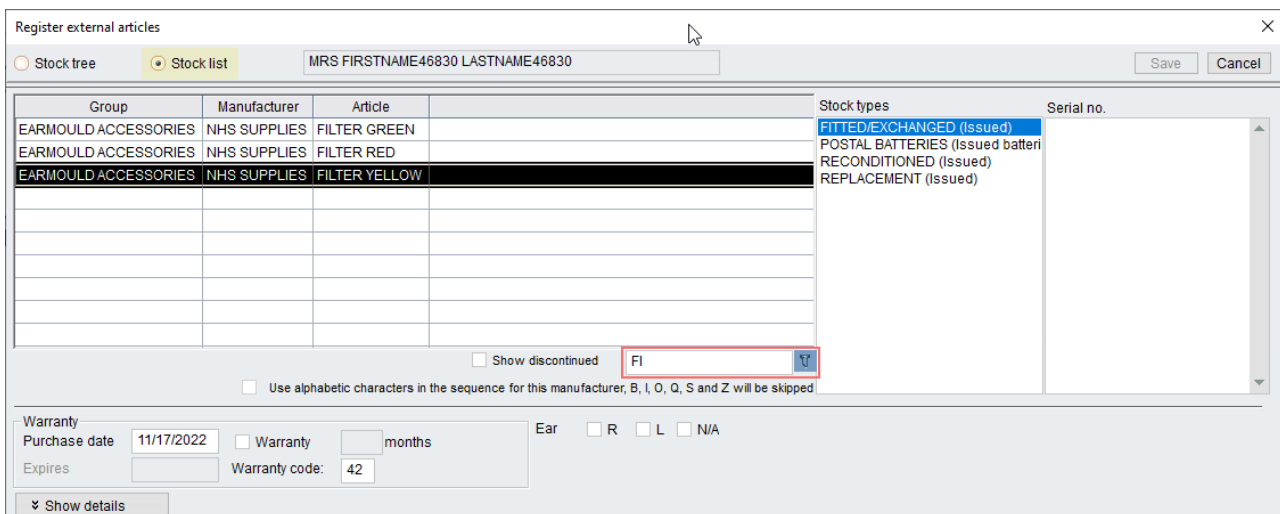
### 13.7 Add external item

The **Add external item** window is initiated by selecting **Functions -> Add external items -> Add serial numbers** or **Add amount controlled articles**.

In the Stock tree view, all devices are shown in the hierarchy *Group/Manufacturer/Article*.



In the Stock list view, you can see all devices in a table.



By default, discontinued items are filtered out. They can be included in the list when the "Show discontinued" option is selected.

In the **Filter** field, you can enter any part of the device name and all related items will be displayed. In the Stock tree view, the search is conducted within the chosen Group and Supplier. In the Stock list view, the search is comprehensive and the output will include items from all Groups and Suppliers.

Optional fields (e.g., price, article ID, item information) are hidden behind the **Show details** button.

Price		
Purchase price	Discount on purchase	Net purchase price
\$0.66	-	\$0.66
	Basic profit	0.00%
Sales price		\$0.66

Article ID: 50284

Item number:

Battery:

Colour: Yellow

Version:

Label:

Type:

Interface connection:

The dialog is used to register on stock issued items, for instance when a client brings a device, which is purchased elsewhere, for repair.

You can register Warranty information, Price information, Item information, side of Ear, etc.

For serial numbers, the functionality of the dialog is the same as for the **Register for Stock** dialog, with the exception that in this dialog, you register devices directly to stock types of the Issued category.

For quantity controlled articles, the functionality of the dialog is the same as for the **New Status** dialog.

*NOTE: Changes in article status create clinical actions. If you have attached them to appropriate appointments, they can be seen in the **Clinical actions** tab of the **Referral** module.*

## 13.8 Moving single articles of stock

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Select **Group**.
- Select **Supplier**.
- Select the article/instrument type.
- Select the current location of **Stock type**.
- Enter the serial number in **Filter for serial numbers** box, if required.
- Click **New status**.
- Select the new stock type.
- Check the number to be moved and click **OK**.

## 13.9 Moving single articles of stock using a Barcode reader

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Scan the hearing instrument barcode.
- If the hearing instrument is already registered in stock the **New status** window will open.
- Select the new stock type and click **OK**.

The system will read either the European standard barcodes known as EHIMA bar codes, GS1 long barcodes or GS1 2D barcodes known as Matrix or QR codes (providing the barcode scanner supports this type of barcode).

*Note: Some barcode scanners will not activate if the mouse cursor is in a read-only text field. If you find the scanner does not seem to action a barcode, try moving the mouse cursor to an editable field or list box.*

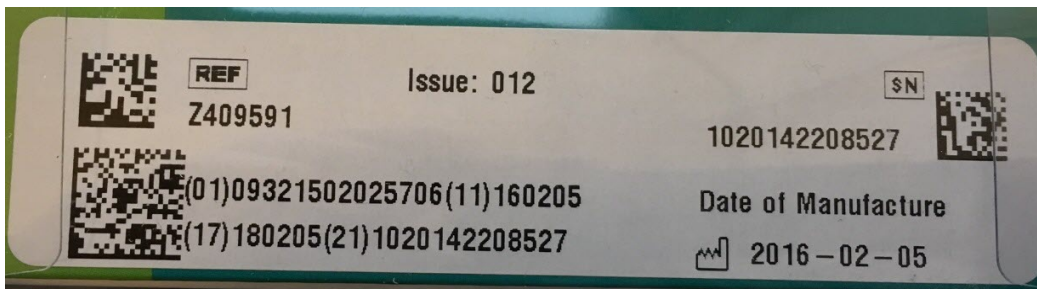
## 13.10 Barcode scanning functionality

The system will read either the European standard barcodes known as EHIMA bar codes, GS1 long barcodes, or GS1 2D barcodes known as Matrix or QR codes (*providing the barcode scanner supports this type of barcode*).

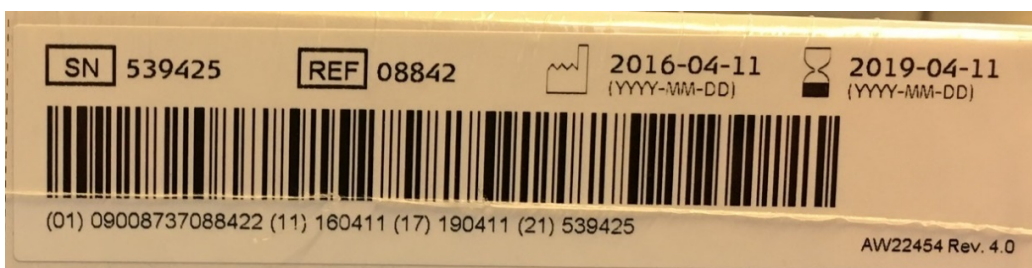
The typical **EHIMA barcode** device label looks like the one below. Please note that it consists of 2 barcodes, both of which must be scanned:



The typical **2D barcode** device label can look like this:



The typical **1D long barcode** device label can look like this:



### Technical principles of scanning barcodes

The barcode scanner attached to a PC simulates typing on the keyboard. Text input from the scanner contains a sequence of symbols encoded in the barcode.

To let the system distinguish between the users' typing and the typing emulated by the scanner, the scanner must be configured to produce the prefix and suffix strings. These strings must be

further specified in the [Auditbase Administration tool](#) (For details, see *Auditbase Admin Guide*, section on 'Bar code settings').

### Information the system gets from the barcodes

After the barcode scanning is recognized, the system takes the following information for processing:

- Manufacturer code
- Device model (article) code
- Device serial number

### IMPORTANT note for EHIMA device barcodes:

- Both barcodes contain important product-identifying information, so both must be scanned for the intended processing.
- The 2<sup>nd</sup> barcode contains the device serial number prefixed by the '21' string. This '21' string is an integral barcode part, and that is how Auditbase recognizes the serial number. Therefore, '21' is only removed by the system when both barcodes have been scanned.
  - The existing functionality in Auditbase is NOT intended for scanning only the barcode part of the EHIMA full barcode.

If the content of the recognized string of symbols cannot be interpreted properly (e.g., *the format is wrong*), the system displays an error message about the wrong barcode detected at scanning.

### Processing the recognized data

Manufacturer code, article code and the device serial number are processed by the system in the following way:

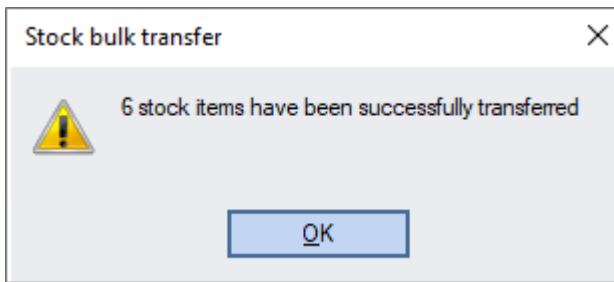
- The system will search for the manufacturer using the manufacturer code. If the code is not found, manual selection will be suggested. After the selection, the code will be saved to the selected manufacturer (the system will use the saved manufacturer code for all subsequent searches).
- Then, the system will search for an article within the manufacturer. If the article is not found, it will suggest manual selection. After the selection, the article code will be saved to the selected article (the system will use the saved article code for all subsequent searches).
- Finally, the system will search for the recognized serial number. If the device with that serial number is found in Stock, the system will assign a *New status* for that device. Otherwise, it will initiate *Registering to Stock*.

## 13.11 Bulk transfers of stock

Large numbers of serial controlled articles can be moved from one stock type to another by using the Bulk transfer option. Articles can only be moved from a stock type with an In stock category to another type of the same category.

- **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Choose **Group, Supplier, Article** and **Stock type** to move the stock from.
- **Functions**
- **Bulk Transfer**

- Select **Group, Supplier** and **Article** and the serial numbers for the articles that are in stock will appear in the **Devices in stock** window.
- Select the required articles to transfer by checking the box next to the serial number. **Select all** can be chosen.
- Once the articles have been chosen, use the arrow to move them to the **Selected devices** window.
- At this stage, articles can still be moved back to **Devices in stock** by unchecking **Select all**, checking the required serial number and use the back arrow to de-select an item.
- Select **Location** (only an option if your site has the appropriate license).
- Select **New stock type** from the drop-down menu. Only stock types with the stock category of **In stock** will be displayed.
- Information can be added to the **History comment** and **Add to item** information boxes.
- **Transfer**
- A confirmation message will appear letting you know how many articles were transferred.



- **OK** the information message.
- Further articles can then be transferred or **Close** the transfer window.

## 13.12 F10 Fast battery issue

Items in one stock group can be set up as a quick stock issue group by the System Administrator. If this is set up, use the following procedure:

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Press **F10**.
- Select **Manufacturer**.
- Select **Article**.
- **Manufacturer** and **Article** will depend on the **Group** which has been selected for **Fast battery issue** when the **Groups** were set up.
- The **Date** and **Signature** are automatically filled in but can be manually changed if required.
- The **Invoice type** is optional and is not generally used.
- The **Customer** must be selected.
- The client's name is displayed. If this is not required, check the **Invoice without client reference** box, and the client's name will disappear.
- Choose the number of **items** that are having their status changed and enter the **New NHS serial number** if required.

*NOTE: Changes in article status create clinical actions. If you have attached them to appropriate appointments, they can be seen in the **Clinical actions** tab of the **Referral** module.*

- **Click on OK** and the information will be saved and the window will close.
- If you want to close the window without saving, select **Cancel**.

## 13.13 Search for a serial number

- **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Click **Search**.

Search for serial no. [X]

Search Search in NOAH Close

Serial no. 234

Quantity found 5

Found items

Serial no.	234	◀ Previous	Next ▶
Group	NHS HEARING AID (Serial N	New status	History
Manufacturer	NHS SUPPLIES	Select	
Article	ITE11ML		
Stock type	FITTED/EXCHANGED (Issu		
Location	All		
Recycled	No		

Client

Hospital no. T1106 Change to

Name MRS FIRSTNAME106 LASTNAME106

- Enter the serial number. Or scan the number using the barcode reader.
- Click **Search**.
- Note that the complete serial number is not required to search. As with a client search, if the first part of a serial number, for instance F412, is entered, Auditbase will display all serial numbers beginning with F412.
- The system shows the number of found items in **Quantity found**. You can scroll through them by clicking the arrow buttons.
- When you select an item, you can click **New Status** to open the **New Status** dialog.
- The **History** button initiates the **History** dialog for the item selected.
- Click **Select** to show in the main Stock screen.
- Another way to search for a serial number is to select the relevant **Group**, **Supplier**, **Article** and **Stock type**, then enter the serial number in the **Filter serial numbers** field. The information for this item will appear in the box below.
- You can also search by entering the first part of a serial number. If more than one item is found, the system shows the number of found items below the item information box and arrow buttons scroll over the items.

## 13.14 Search for serial number in Noah

- **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Click **Search**.

Search for serial no. [X]

Search Search in NOAH Close

Serial no. 234

Quantity found

Found items

Serial no. [ ] Previous Next

Group [ ] New status History

Manufacturer [ ] Select

Article [ ]

Stock type [ ]

Location [ ]

Recycled

Client

Hospital no. [ ] Change to

Name [ ]

- Enter the serial number. Or scan the number using the barcode reader.
- Click **Search in Noah**.
- Now you can search for the serial number in Noah fitting actions.

Search NOAH for serial number

Search in NOAH fitting actions Close

NOAH fitting actions

Search

Serial number:   Suspend search on most recent occurrence found

Date from:  to:

Client	Hospital no.	NHS no.	Action datetime	Action description	User name

- The **Date from** field is automatically set to a year since today's date and the **to** field is set to today's date.
- Check the box **Suspend search on most recent occurrence found** to stop the search at the most recent match.
- Click **Find next** to continue the search.
- Select a fitting action and click **Close** to return to the Search window, where you can enter a **New status**, see the **History** or **Select** the article to show it in the main Stock module. The client will also change in Auditbase, if different from the previously selected client.

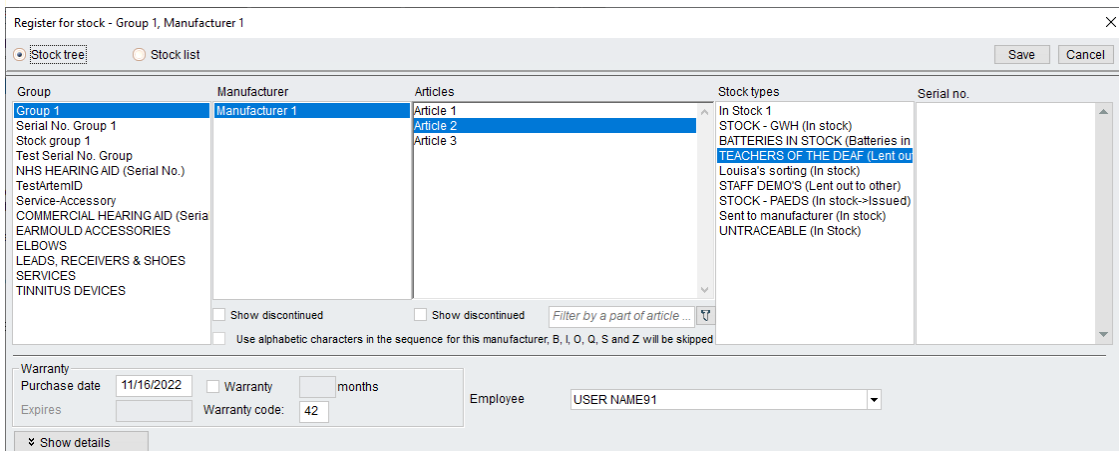
## 13.15 Item and article information

- Select **Functions -> Item information** to open a window to enter information about an item, for instance settings and special conditions.
- Select **Functions -> Article information** to open a window to enter information about an article, for instance settings and special conditions.

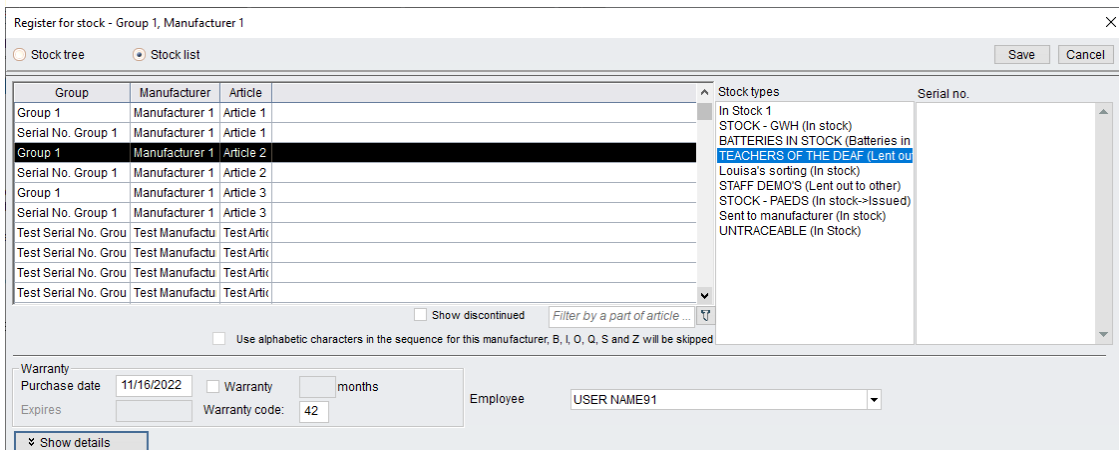
## 13.16 Register for Stock

Registering items to increase stock is done manually or by using a bar code reader.

- **Navigation** -> **Stock** or press **Shift+Ctrl+S**.
- Select **Group** and **Manufacturer**.
- Select **Functions**.
- Select **Register for stock manually** and add the relevant items. You can use different types of views to find devices that you want to register.
  - In the Stock tree view, all devices are shown in the hierarchy *Group/Manufacturer/Article*



- In the Stock list view, you can see all devices in a table.



By default, discontinued items are filtered out. They can be included in the list when the "Show discontinued" option is selected.

In the **Filter** field, you can enter any part of the device name and all related items

will be displayed. In the Stock tree view, the search is conducted within the chosen Group and Supplier. In the Stock list view, the search is comprehensive and the output will include items from all Groups and Suppliers.

- To see additional fields, click "Show details".

The screenshot displays a software interface with two main sections. On the left, there is a 'Price' calculation table:

Price	Discount on purchase	Net purchase price
Purchase price	20%	\$160.00
\$200.00	-	=
	Basic profit	0.00%
Sales price		\$160.00

Below the table is a 'Calc.' button. To the right of the table, there are several input fields for item details:

- Article ID: 50400
- Item number: [empty]
- Battery: 2
- Colour: 11
- Version: [empty]
- Label: [empty]
- Type: 22
- interface connection: [checked]

On the far right, there is a large empty box labeled 'Item information'.

*Your System Administrator can define whether the type is Serial number or Quantity controlled.*

- When scanning any new item with the bar code reader, the system will open the Register for Stock dialog automatically. Once opened the Manufacturers that the manufacturer element of the barcode has been used for before will be highlighted in blue. The user must select either one of these or a another one if the item comes from a different manufacturer (*Note that due to HIMSA rules it is allowed for manufacturers to supply items as OEM to other manufacturers while retaining the original manufacturer's barcode*). If only one Manufacturer has been used previously with the manufacturer element of this barcode that(than?) Manufacturer will be preselected.
- If registering for stock using a bar code scanner, the **Group** and **Manufacturer** must be selected before scanning bar codes as the same **Manufacturer** could exist in multiple stock groups.
- Barcode reading can be done on serial numbers only. Users can scan just the serial number part of a barcode rather than the **Manufacturer** and **model (article)**. This allows users to search for the device using the barcode and to register the device when the manufacturer is already selected.
- When registering for stock the following fields can be filled in:

Type: Serial number

- Available articles of the selected group/manufacturer are listed together. Select the **Article** and **Stock type**, this is generally **Stock** or **In Stock**, depending what it has been called and enter the **Serial number** of the **Articles** that are being registered.
- A number of articles can be entered by separating the numbers with a comma, i.e. FG6 453678,BH1 678125 to register these two articles. Ensure that there are no spaces after the comma or it will be taken as a character.
- A series of numbers can be entered by separating the first number in the series and the last number in the series with a semicolon, i.e. 100;120 will add all serial numbers between 100 and 120. Ensure that there are no spaces after the semicolon or it will be

taken as a character. Certain letters can also be used in the sequence if enabled for that manufacturer, see the text on the dialog for details.

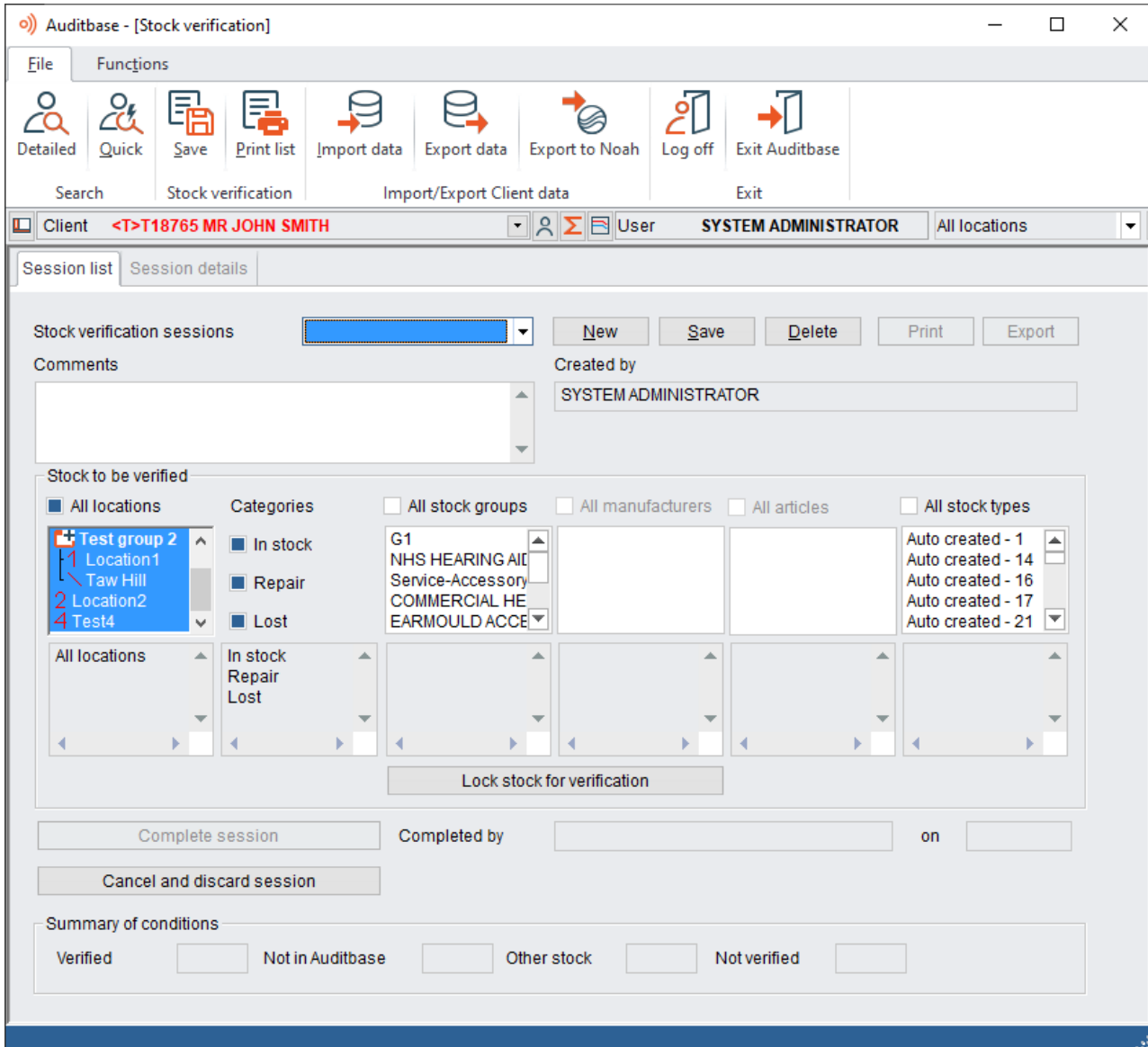
- The Warranty date can be added by selecting the **Warranty** check box and adding the number.
- The **Purchase price incl. vat** and **Sales price incl. vat** is automatically entered from the **Article** information. If the window is initiated by barcode scanning, the purchase price is taken from the barcode. These are manually adjustable if required. **Battery** and **Colour** are also automatically entered if they have been set up and can be changed.
- When registering a Serial Number controlled device to Stock, Users can select the Stock Category “Lent out to other” and register a device to the Employee’s name.
- **Save** the entry, and more can be added.

Type: Quantity

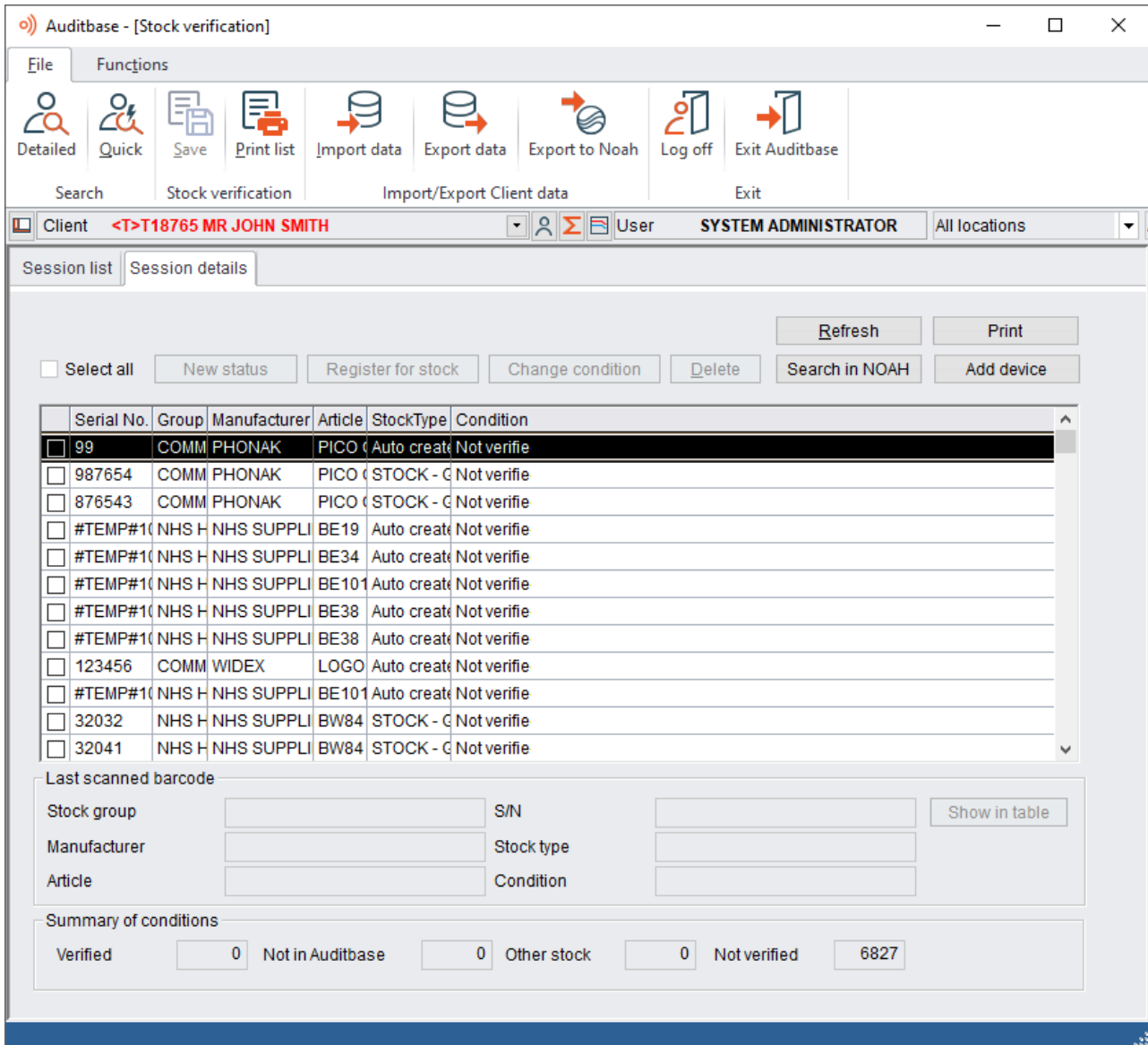
- The **Stock registration** window is opened and a list of available **Articles** is displayed. Select the **Article** and **Stock type**, this is generally **Stock** or **In Stock**, depending what it has been called and enter the number of **Articles** that are being registered. When registering for stock it is now possible to hide the discontinued stock; if you wish to show the discontinued stock then the button should be selected and the discontinued items will be shown.
- The **Purchase date** is automatically entered as the current date but can be changed manually if the user has the corresponding right granted.

## 13.17 Stock verification using a barcode reader

- **Navigation** -> **Stock verification** or press **Shift+Ctrl+V**.
- Specify the parameters needed in the **Session list** tab; choose which stock you would like to verify based on Locations, on categories of In stock, Repair and Lost, and on Stock Groups, Manufacturers, Articles and Stock types. Either one or all of each criterion must be selected. Selected criteria appear in the lower boxes.



- Click on **Lock stock for verification** in order to prevent stock modification by other users while verifying.
- Now scan the barcodes one by one.



- After each scan, the system recognizes the scanned barcode and searches for the scanned serial number on stock.
- Depending on the search result, the scanned articles are given a condition.
- The following conditions are possible:

**Verified** – the article is on stock and has been scanned

**Not in Auditbase** – the article has been scanned but is not available on stock neither in the stock that has been locked for verification nor in the stock that hasn't been locked

**Other stock** – the article has been scanned but it was found in the stock that hasn't been locked for verification

**Not verified** – the article is on stock but hasn't been scanned yet (this is the initial status for all articles on stock)

- During the scan, the Summary of conditions is shown.
- Once the conditions are shown, the statuses that are not satisfactory can be edited i.e. by moving the article to a different stock type with the **New status** button or using the **Register for stock button** to register those articles to stock that are **Not in Auditbase**. **Change condition** can be used to change the outcome of the verification manually.

*NOTE: Changes in device status create clinical actions. If you have attached them to appropriate clinical actions, they can be seen in the **Clinical actions** tab of the **Referral** module.*

- With **Add device** you can manually add a device, if for instance a barcode cannot be read. Once the session is saved, the system searches for the device and changes its condition.
- Once the verification is finalised, go back to the **Session list**-tab.
- You may add comments to the session, a note about the result or to a colleague who is working with you.
- You can now export the session data to a CSV file by clicking **Export**. The current date will be the 1<sup>st</sup> row, site name (which is retrieved from the system administration tool/General settings/Database site name) is the 2<sup>nd</sup> row, the number of detailed rows is the 3<sup>rd</sup> row and headers on the table columns on the Session details-tab is the 4<sup>th</sup> row. The destination file now contains the values that are visible on the Session details-tab.
- Click on **Complete session** to save the changes made and open up the stock for other users.

## 13.18 Requisition

The requisition window is for an audiologist to fill in, if a particular hearing instrument should be ordered for a client or for keeping stock level(s).

Ordering items for stock follows one or more steps involving **System requisition** and **Purchase orders**.

The screenshot shows the 'Requisitions' window with the following details:

- New requisition**
  - Date: 12/05/2021
  - For selected client:  MRS FIRSTNAME92 LASTNAME92
  - User: SYSTEM ADMINISTRATOR
- Select article**
  - Group: G1
  - Manufacturer: (1)Testmanu, (2)Testmanu, 123456789, NHS SUPPLIES, (3)TestManufacturer
  - Article: test group, ITE10ML, ITE11MR, ITE11ML, BE101, BE101B, BE101G, BE102HF, BE103, BE105, BE18
- Quantity: 2
- Colour: BEIGE
- Audiogram: 12/02/2021, no. 1
- Initial registration to in-house stock type:
  - To in stock
  - To lent out to employee
- Stock type: TEACHERS OF THE DEAF (Lent o...)
- Employee: SYSTEM ADMINISTRATOR
- Deliver by: 12/07/2021 to arrive 7 days before next appointment

**Requisition list**

Quantity	Article ID	Model description	Ordered by	Stock type	Date	Deliver to	Deliver by	Colour	Hospital no
2	50265	NHS SUPPLIES, BE101G	SYSTEM ADMINISTRATOR		12/05/2021	SYSTEM ADMINISTRATOR	12/12/2021	BLUE	T110017
2	50265	NHS SUPPLIES, BE101G	SYSTEM ADMINISTRATOR		12/05/2021	SYSTEM ADMINISTRATOR			
2	50252	NHS SUPPLIES, BE105	SYSTEM ADMINISTRATOR	STOCK - GWH (In stock)	12/05/2021	STOCK - GWH (In stock)	12/24/2021	BLACK	T110017
2	50223	NHS SUPPLIES, BE34	SYSTEM ADMINISTRATOR		12/05/2021	SYSTEM ADMINISTRATOR		BEIGE	T123
4	50220	NHS SUPPLIES, BE101	SYSTEM ADMINISTRATOR	TEACHERS OF THE DEAF (Lent out to other)	12/05/2021	SYSTEM ADMINISTRATOR			

To create a new requisition:

1. Choose whether an article(s) is due for **selected client** or **no client** using the check box at the top.
2. Select an article from **Group/Manufacturer/Article** going through the hierarchy as it is displayed in the Stock module.
3. Specify **quantity** (mandatory).
4. Define **colour** (optional).
5. Choose an **Audiogram** if it is needed on Order form for the manufacturer. This option is only available for **selected client** and defaults to the latest audiogram.
6. Select a **Stock type** for the initial registration of the article (within a session, this value is remembered inside the form). Opt for either of the following:
  - To in Stock
  - To Lent out to Employee (*Employee will default to the current user. When requisitioning for yourself, use this default as a fast option*).
7. Deliver by
  - When **selected client** is chosen, the next appointment appears. The 'Deliver by' date is set by the System Administrator for a specified number of days before the client's next appointment. This date can be altered manually.

- If the requisition is not created for a selected client, the 'Deliver by' date should be entered manually.
8. **Clear** removes all selections.
  9. On **Save**, the new requisition appears in the 'Requisition list' table below.
    - If more articles are required from the same manufacturer, clicking **Save** will clear the **Article, Quantity, Colour** and **Deliver by** fields which are then free to specify additional articles for the **Requisition list**.
    - *Note that **Group, Manufacturer** and **Stock type** will keep the information.*

On the *Requisition list* table, all the details of the Requisitions are shown (*Stock type, Deliver by date, Audiogram date and Patient identifier*):

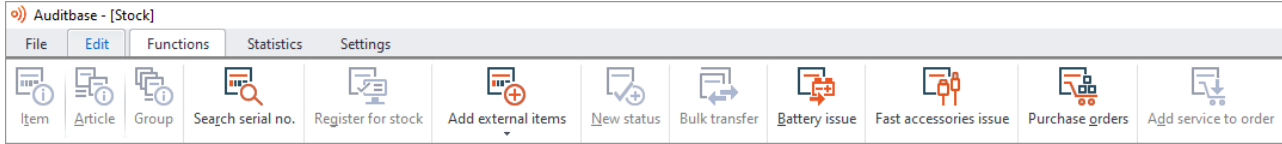
- The table can be re-ordered as usual
- Yellow highlighted quantity is editable

Delete an existing order form line (*done when ordered*) by clicking on it and then clicking **Delete**.

The **New purchase order** button will open a 'Purchase order' form for whichever requisition is selected in the table.

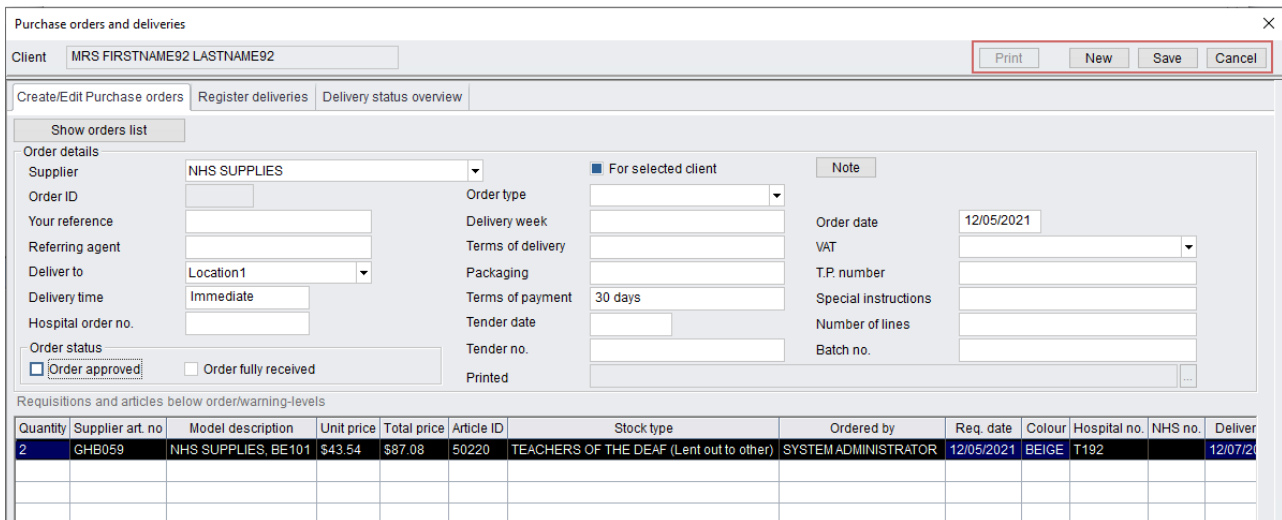
## 13.19 Purchase orders

The 'Purchase orders' dialog is used to order requested articles. To open the dialog, select **Functions -> Purchase orders** from the **Stock** module or click on 'Purchase orders' in the Navigation menu.



The dialog contains:

1. **Show orders list** button that opens the list of existing orders.
2. 'Order details' section where order information is entered.
3. 'Order status' section designed for order tracking.
4. 'Requisitions and articles' table listing requisitions that can be included in the order. For existing orders, the lower part of the dialog will show the 'Order details' table.
5. **Print, New, Save** and **Cancel** controls.



### 13.19.1 Create/edit/print a purchase order

#### Create

To create an order:

1. Click **New** on the 'Purchase orders' dialog

or **New purchase order** in the 'Requisition' form.

Quantity	Article ID	Model description	Ordered by	Stock type	Date	Deliver to	Deliver by	Colour	Hospital no
2	50220	NHS SUPPLIES, BE101	SYSTEM ADMINISTRATOR	TEACHERS OF THE DEAF (Lent out to other)	12/05/2021	SYSTEM ADMINISTRATOR	12/07/2021	BEIGE	T192
2	50265	NHS SUPPLIES, BE101G	SYSTEM ADMINISTRATOR		12/05/2021	SYSTEM ADMINISTRATOR	12/12/2021	BLUE	T110017
2	50265	NHS SUPPLIES, BE101G	SYSTEM ADMINISTRATOR		12/05/2021	SYSTEM ADMINISTRATOR			
2	50252	NHS SUPPLIES, BE105	SYSTEM ADMINISTRATOR	STOCK - GWH (In stock)	12/05/2021	STOCK - GWH (In stock)	12/24/2021	BLACK	T110017


- Select the required supplier from the drop-down list.
  - Coming from the Requisition form, the supplier and requisition will be preselected.
- Select the type of order (optional).
- '**For selected client**' filter will display requisitions for that client only.
  - This filter is only available if the global client has been selected on the main screen.
- Specify order details in the 'Order details' section.
- Choose '**Deliver to**' from the list of Locations.
- Click **Note** to enter any comments for the article.
- Highlight the requisitions to be ordered. Multiple requisitions can be highlighted by clicking and holding down **Ctrl** or **Shift**.
- Save. The order is now assigned a unique reference (DD-MM-YYYY, No.) and entered into the **Existing orders** list.
- On Save, the 'Order details' table is shown at the bottom of the 'Purchase orders' form. In the 'Order details' table, fields highlighted in yellow are editable (e.g., *Quantity*, *Received quantity*, *Requisition date*, *Colour*, *Deliver by*).
  - Change the number of articles and colour as required.
  - Changes can be made directly in the table by clicking the corresponding cell.
- Fill '*Received*' to complete the receipt of the order without triggering *Stock Registration*.
- '**Order fully received**' is ticked automatically when the received quantity matches the ordered quantity.


## Edit

Existing orders can be updated.

To update an order:

1. Click the button **Show orders list**. This will open a separate pop-up with the list of orders.
2. Use filters to quickly find your order:
  - Choose *supplier* to show orders for a certain supplier.
  - Select the relevant *order type* to display orders only of this type.
  - To view all orders, select **Include fully received orders**. Fully received orders are excluded by default.
  - If necessary, use additional column filtering on table columns (*NOTE: All Order columns can be pre-filtered*).

Refresh  if some of the list content has changed (e.g., an order received a new status or more orders have been added).

Use the  icon to dock and undock the dialog within the 'Purchase orders' form.

3. Once the order has been selected and the relevant information loaded into the 'Purchase orders' form, you can make the needed changes to your order.
  - For instance, orders can be approved and marked as received by selecting the **Order status** check boxes. When the orders are received, the received quantity can be entered in the column next to the quantity ordered.

## Print

To print an order, click **Print**.

You can choose a Standard printout template or you can configure a Word document template to be used for printing purchase orders. For more information on templates, refer to [Documents and attachments](#).

*NOTE that your order must be patient-related to use Word templates.*

To add a template to the 'Print pop-up menu'

1. Go to the Documents and attachments module.
2. Select your template in **Document type > All template documents**.
3. Go to **Functions > Properties**.
4. Tick **Available in module - Purchase order**.
5. Save.

To apply a new template

1. Go back to the **Purchase order** screen.
2. Select your order from the **Orders list** (*Navigate to the list using the Show orders list*)

button).

- From the **Print** menu, choose the newly added template.

If you do not need a certain template to be shown in the 'Print pop-up menu', follow steps 1-3 from the procedure above and remove the selection from **Available in module - Purchase order**.

If the Purchase order has been printed out as a document, this document will be attached in the **Printed** area of the 'Order details' section of the 'Purchase order' form.

- You can **open** this order printout to make changes, or **detach** if it is no longer needed.

### 13.19.2 Register deliveries

After devices have been received, they should be registered as delivered on order and registered to stock. To do so, go to the *Register deliveries* tab.

There are two ways to enter device information:

- With a barcode reader
- Manually

Purchase orders and deliveries

Client: MRS FIRSTNAME92 LASTNAME92 Cancel

Create/Edit Purchase orders | Register deliveries | Delivery status overview

Supplier: NHS SUPPLIES | Requisition date from: 10/19/2021

Manufacturer: NHS HEARING AID (Serial No.), NHS SUPPLIES | Article: BE101

Register to stock

Filter by Client or Order ID: T192

Quantity	Supplier art. no	Model description	Received	Unit price	Total price	Stock type	Ordered by	Req. date	Colour	Hospital no.	NHS no.	Order ID	Deliver by
2	GHB059	NHS SUPPLIES, BE101	1	\$43.54	\$87.08	TEACHERS OF THE DEAF	SYSTEM ADMINISTRATOR	12/05/2021	BEIGE	T192		54	12/07/2021

Register delivered requisition items to stock

Serial number(s): 333456

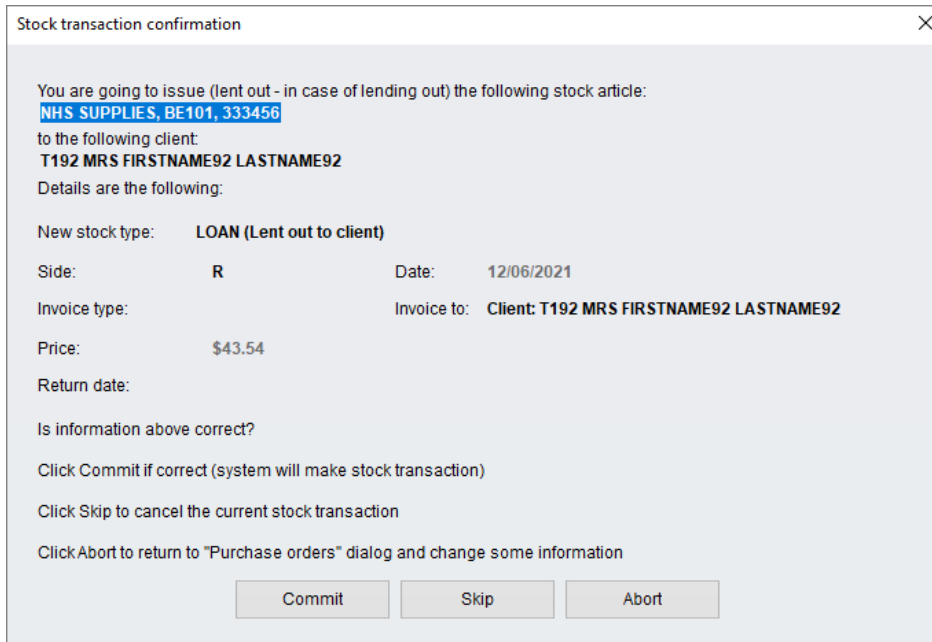
Initial registration to in-house - stock type: TEACHERS OF THE DEAF (Lent out to other) | Ear:  R  L  N/A

Employee: SYSTEM ADMINISTRATOR

Lent out to patient - stock type: LOAN (Lent out to client) | Register to stock

To register, follow these steps:

1. Search an ordered requisition by selecting **Supplier**, **Manufacturer** and **Article**. When you scan the barcode with a reader, all these fields will be filled automatically.
2. Select a requisition
  - For faster selection, filter by Client or Order ID.
3. Enter a serial number of the delivered item. Several serial numbers need to be separated by commas without additional spacing. To separate a range of numbers, use a semicolon without additional spacing.
  - Each item needs to be registered separately.
  - When using a barcode reader, the serial number of the device is filled automatically.
4. Choose 'Initial registration to in-house - stock type' and employee if registered as 'Lent out to employee'
  - For patient-related items, additionally select 'Lent out to patient - stock type' and ear side.
5. Click **Register to stock**
  - Each stock transaction needs to be confirmed if this is configured in the administration tool.
  - Additionally, information on delivered items can be attached to patient appointments and registered in journal.



### 13.19.3 Delivery status overview

The Delivery status overview can be used to review the status of existing deliveries (e.g., partial, missing, complete).

Users can filter results by:

- Supplier
- Delivery date
  - 'Delivery from ... to...' can limit the number of orders by specifying the date range when these deliveries are expected.
- Whether only a part or the entire order is missing
  - 'Show not delivered only' check box is selected by default to limit the list to outstanding deliveries. You may clear this selection to see old orders.
- Requisition date
  - 'Requisition date from' defaults to the date ONE month from the current date. It is used to remove old irrelevant records from search results.

**Purchase orders and deliveries**

Client: **MRS FIRSTNAME92 LASTNAME92** Cancel

Create/Edit Purchase orders Register deliveries **Delivery status overview**

Supplier: **NHS SUPPLIES** Requisition date from: **11/06/2021**

Delivery from: **11/30/2021** to **12/22/2021**  Show not delivered only

Quantity	Supplier art. no.	Model description	Received	Unit price	Total price	Stock type	Ordered by	Req. date	Colour	Hospital no.	NHS no.	Order I
8	GHB043	NHS SUPPLIES, BE103	0	\$33.53	\$268.24	TEACHERS OF THE DEAF (Lent out to other)	SYSTEM ADMINISTRATOR	11/30/2021	BLACK			45
2	GHB059	NHS SUPPLIES, BE101	2	\$43.54	\$87.08	STOCK - GWH (In stock)	SYSTEM ADMINISTRATOR	11/29/2021	BEIGE	T110013		41
2	GHB059	NHS SUPPLIES, BE101	2	\$43.54	\$87.08	TEACHERS OF THE DEAF (Lent out to other)	SYSTEM ADMINISTRATOR	12/05/2021	BEIGE	T192		54
7	GHB003	NHS SUPPLIES, BE18	5	\$23.95	\$167.65	STOCK - GWH (In stock)	SYSTEM ADMINISTRATOR	11/30/2021	NUDE	T110013		47
6	GHB003	NHS SUPPLIES, BE18	6	\$23.95	\$143.70	STOCK - GWH (In stock)	SYSTEM ADMINISTRATOR	12/02/2021	BEIGE			49

## 13.20 Purchase statistics

In this window, statistics of article purchases is retrieved. To open the dialog, select **Statistics - > Purchase statistics** from the **Stock** module.

Purchase statistics for serial numbers
✕

Print
Export to CSV
Close

**Search parameters**

**Group**

- G1
- NHS HEARING AID (Serial No.)
- Service-Accessory
- COMMERCIAL HEARING AID (S
- EARMOULD ACCESSORIES
- ELBOWS
- LEADS, RECEIVERS & SHOES
- MISC. HA ACCESSORIES
- SERVICES
- TINNITUS DEVICES

**Manufacturer**

NHS SUPPLIES

**Period**

From:

To:

**Mode**

Summary of articles

Summary of article groups

Detailed

Show

**Statistics**

Manufacturer	Man. code	Article group	Article	Art. code	Quantity	Total Price
NHS SUPPLIES			BEA1 (BOOKLET)		1	£0.13

In total: 
Total price:

Statistics are calculated based on registered devices in stock.

- Selecting **Group** lists the **Manufacturers** defined in this group.
- Selecting two and more groups selects all manufacturers of these groups and clears the list of manufacturers. Select or deselect a group by clicking on it in the list.
- If a single group is selected, one or more, or all, manufacturers from the list can be highlighted.
- Add or deselect manufacturer(s) by clicking in the list. Selecting none of the manufacturers implies selecting all.
- You can specify whether statistics should be done on **Summary of articles**, **Summary of article groups** or **Detailed**. **Summary** calculates totals per manufacturer/device, **Detailed** shows serial numbers.
- Specifying a purchase period in **From** and **To** limits statistics to the selected date range.
- Click **Show** to calculate the statistics. The results of the calculation are shown in the **Statistics** table. Below the table the total number of purchased devices and the total purchase price is shown.
- When statistics are calculated, you can print the results by clicking **Print**.
- Detailed statistics can be exported to a comma-separated (CSV) file by clicking **Export to CSV**.

### 13.21 Stock statistics

To open the dialog, select **Statistics -> Stock Statistics** from the **Stock** module. In this window statistics for activities in stock are retrieved.

New stock type	Manufacturer	Article	Qty.	Price	Article type
STOCK - GWH (In stock)	Manufacturer 1	Article 1	1	\$23.00	STAYE DRY TUBING
STOCK - GWH (In stock)	Manufacturer 1	Article 2	2	\$134.00	HA FITTING
STOCK - GWH (In stock)	Manufacturer 1	Article 4	1	\$0.00	REHABILITATION
BATTERIES IN STOCK (Batteries in stock)	Manufacturer 1	Article 3	1	\$0.00	PRESENTATION BOX

The leftmost list contains stock groups. Depending on the group selected, statistics are calculated for serial numbers, quantity-controlled articles or services.

It is possible to save all selections and options made on the *Stock statistics* dialog as a filter in order to run the same statistics when needed.

On the **Save filter** dialog, you can create a new filter, update and rename the current filter, or make your preferred filter the default.

### 13.21.1 Statistics for serial numbers

- Statistics for serial numbers can be calculated in total (summary statistics) or per item (detailed statistics) by selecting the corresponding option.
- Detailed statistics can be calculated with or without mention of a client by selecting or deselecting **Client reference**.
- Select **Recycled articles only** to calculate statistics for the recycled devices only. This can be calculated for current stock status or on the basis of transactions by selecting this option. If this option is selected, statistics can be restricted for a time range and user-performed transactions.
- One or more manufacturers can be selected by clicking in the **Manufacturer** list.
- All manufacturers can quickly be selected by checking the **Select all** box.
- Statistics will be filtered for the selected manufacturers.
- If a single manufacturer is selected, one or more articles of this manufacturer can be selected by clicking in the **Article** list.
- All articles can quickly be selected by checking the **Select all** box.
- Selecting more than one manufacturer implies selecting all the articles from these manufacturers.
- For **Current status** statistics, one or more stock types can be selected in the **Stock type** list.
- For statistics based on transactions, one or more stock types can be selected in the **New stock type** and **Previous stock type** lists.

### 13.21.2 Statistics for quantity-controlled articles

- Statistics for quantity-controlled articles can be calculated for current stock status or based on transactions by selecting the corresponding option.
- If the statistics are calculated based on transactions, statistics can be limited to time range and user-performed transactions.
- Individual transactions with client details can be shown by selecting **Per item with client reference**. The result will show the client's details alongside article information.
- One or more manufacturers can be selected by clicking in the **Manufacturer** list. All manufacturers can quickly be selected by checking the **Select all** box. Statistics will be filtered for the selected manufacturers.
- If a single manufacturer is selected, one or more articles of the manufacturer can be selected by clicking in the **Article** list. All articles can quickly be selected by checking the **Select all** box. Selecting more than one manufacturer implies selecting all articles from these manufacturers.
- For **Current status** statistics, one or more stock types can be selected in the **Stock type** list.
- For statistics based on transactions, one or more stock types can be selected in the **New stock type** and **Previous stock type** lists.



- The **Calculation criteria** area is used to specify the parameters for the statistical calculation. The following parameters can be specified:
- **Date range:** hearing instrument issues falling into a specified range of dates will be included in the statistics. If the field is empty the interval is unlimited.
- **Age interval:** issues to clients with their age falling into a specified interval will be included in the statistics. No value in the range means unlimited interval.
- **Client gender:** Male, Female or Not specified. Check the boxes to include in the statistics, issues to a client of a chosen gender. At least one of boxes must be checked.
- **Issue type:** the statistics calculate Monaural and Binaural issues separately, so the required issue type must be selected before calculation.
- When all the criteria have been specified, press **Calculate** to calculate the statistics. The result is shown in the result table below and includes client name, personal number, issue date and total number of issues.
- Press **Print** to print the results.
- You can also export the results to a comma-separated (CSV) file. Click **Export to file** and select the target file in the file selection dialog.



## 13.23 Financial stock report

- Select **Statistics** -> **Financial Stock Report**.

This report is generated and printed based on a selection of **Location**, **Date interval**, **Stock Groups** and price limits.

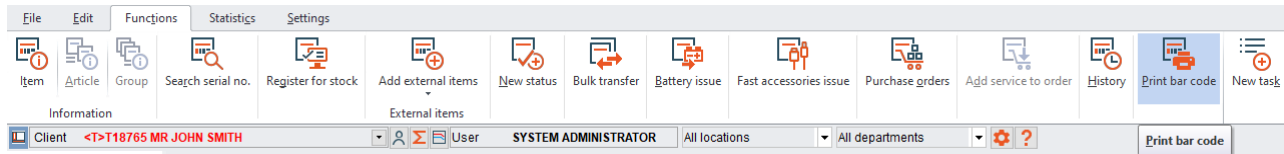
Price limit	Stock group
<input type="checkbox"/>	G1
<input checked="" type="checkbox"/>	NHS HEARING AID (Serial No.)
<input type="checkbox"/>	Service-Accessory
<input checked="" type="checkbox"/>	COMMERCIAL HEARING AID (Serial No.)
<input type="checkbox"/>	EARMOULD ACCESSORIES
<input type="checkbox"/>	ELBOWS
<input type="checkbox"/>	LEADS, RECEIVERS & SHOES
<input type="checkbox"/>	MISC. HA ACCESSORIES
<input type="checkbox"/>	SERVICES
<input type="checkbox"/>	TINNITUS DEVICES

The report lists information such as:

- Issued articles in period
- Issued recycled articles in period
- Articles on stock
- Articles lost during a period of time
- Articles taken back during a period of time

## 13.24 Bar code print

When you have selected an item from stock which is controlled by serial number, a label with the item data can be printed. Go to **Functions** -> **Print bar code**.



The layout of the barcode print depends on the type of barcode to be used. This is defined by the System Administrator. The settings for type of barcode standard, prefix and suffix are also defined by the System Administrator.

## 13.25 Articles

The **Articles** dialogue is opened by selecting **Functions** -> **Settings** -> **Articles** from the **Stock** module. You can also double-click an article in the list.

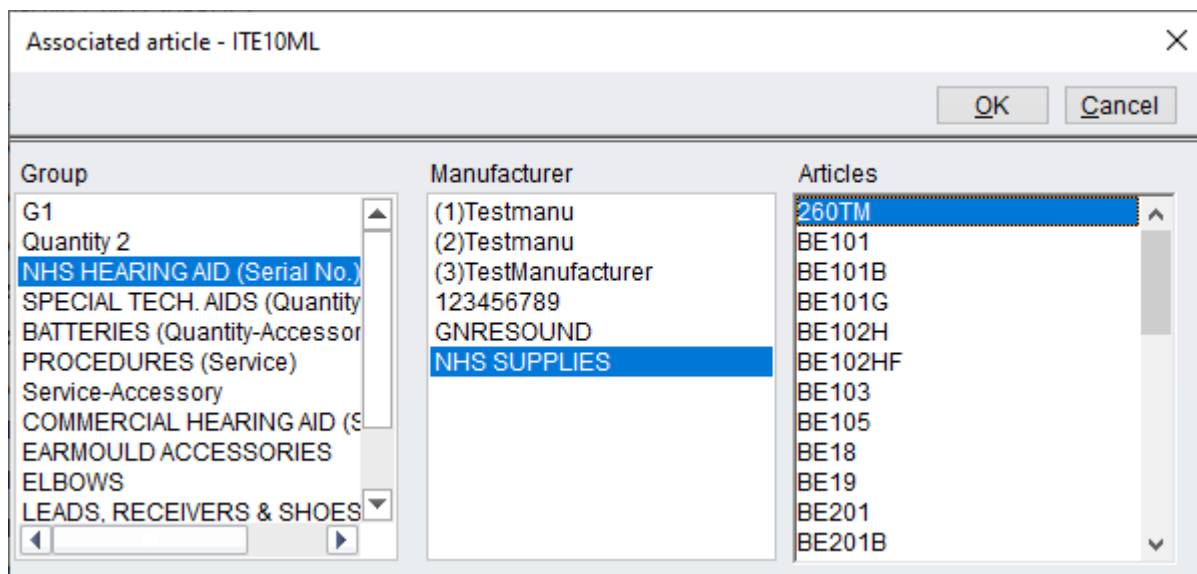
In this dialogue articles can be added to the list of the selected group or details of a selected article can be changed.

- To add a new article, click **New** and enter the information for the article.
- To edit an existing article, select it in the list and modify the record.
- The following information can be entered for an article:
- **Article:** the name of the article.
- **Article type:** the type of the article should be selected from the drop-down list.
- **Supplier:** select the supplier of the article from the drop-down list.
- **Supplier article number:** this can be the catalogue or part number of the Article.
- **Priority:** a priority can be assigned and Auditbase will list the articles by priority and then alphabetically.
- NHS article no, Colour, Battery, Type, Version, and Internal article no: these fields can be entered as any symbols.
- **Purchase price** incl. vat, **Discount on purchase**, and **Sales price** incl. vat can be added. This will help in stock taking if required. Sales price can be calculated based on article profit by pressing the **Calc.** button.
- **Warranty:** check this box and specify the number of months if the article has a warranty. A maximum of 999 months can be added.
- **Discontinued:** if this box is checked, the Article will not be listed.

- **Associated articles:** is a list of articles associated with the current article, for instance spare parts. Press **Add** to specify a new associated article, and select it in the opened dialogue (see Associate articles for details). Press **Delete** to remove the association with an article.
- **Manufacturer ID barcode:** the barcode for the specific manufacturer can be chosen here. Several barcodes might exist for the same manufacturer, if the manufacturer produces articles in different countries.
- **Product ID barcode:** a list of possible barcodes for the current article can be entered in this table. The format of the barcode is set by the system administrator. The system uses barcodes to identify articles via scanning with a scanner attached to the computer.
- **Article information:** this is a free text field for entering any required information about the Article.
- **Save** saves the current article.
- **Delete** deletes the selected article from the database.

### 13.25.1 Associated articles

In the **Associated article** dialogue, you can add a dependent article to an article being edited. To open the dialogue, click **Add** in the **Associated article** section in the **Article** dialogue.



- In the dialogue, select **Stock type**, **Manufacturer**, and **Article**.
- Click **OK** to add a selected article to the list of associated articles.

## 13.26 Edit groups of articles

You can set up groups of articles per manufacturer. This is useful if you for instance want to group articles with the same colour.

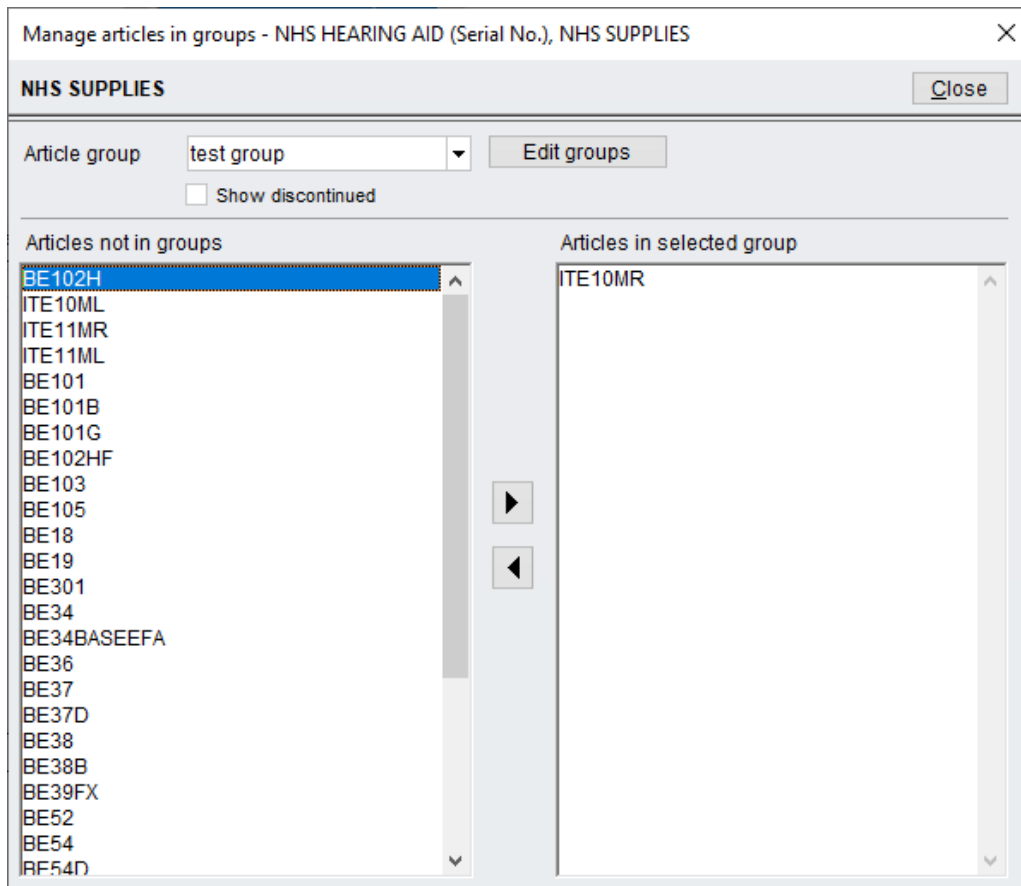
The dialog is opened by selecting **Functions -> Settings -> Edit groups of articles** from the **Stock** module.

Purchase price	Discount on purchase	Net. purchase price
£6.00	- 7.00%	= £5.58
	Basic profit	1.23%
Sales price		£5.65

- Give the group a name, type and supplier – mandatory in order to save.
- Enter other relevant information.
- Click **Save**.
- Once the group is saved it will show up in the main Stock window, when you select main group and manufacturer.
- Right-click the group to edit it directly from the main Stock window.

## 13.27 Manage articles in groups

When you have created a group of articles, you need to manage the articles in the group, which you do by selecting **Functions** -> **Settings** -> **Manage articles in groups**.



- First choose the relevant article group from the drop-down list.
- If you want to edit groups of articles, click on **Edit Groups**.
- The list to the left contains all articles that haven't been put into a group.
- The list to the right contains the articles that are currently in the selected group.
- Choose an article and use the arrows in the middle to move it either into a group or out of a group.
- Changes are automatically saved.

## 13.28 Creating a new or modifying a service

Select the service and the type and open the **Services** dialogue by selecting **Functions -> Settings -> Services** from **Stock**.

In this dialogue services pertaining to a selected manufacturer can be defined. Services are defined by name and prioritised for the list order. Additional attributes can also be specified.

- To create a new service, press **New** and enter the name of the new service.
- To edit an existing service, select a service in the list. The service number (ID) is added automatically.
- If required, specify a priority for this service.
- **Article type** can be selected from the drop-down list. The entire list of types is defined in the dialogue opened by selecting **Functions -> Settings -> Article types**.
- Enter a sales price for the service and a comment if required.
- Click **Save** to save the new or modified information to the database.
- Click **Delete** to delete a selected service from the database.

## 13.29 Suppliers

From this menu item a window is displayed in which suppliers can be defined by name, address, contact person, supplier number, etc. In **Functions -> Settings -> Suppliers:**

The screenshot shows the 'Suppliers' window with the following details:

- Supplier List (Left Pane):** ArtemTestID, NHS SUPPLIES, PURETONE, Test supplier test, newMak, test, A&M HEARING LTD, AUDIFON, AUDIMED, AUDIOMEDICAL DEVICES LTD, GNRESOUND (DANAVOX), LAVIS, **MINERVA** (selected), OTICON, P C WERTH LTD, PHONAK, RESOUND VIENNATONE LTD, SIEMENS, STARKEY.
- Supplier Details (Right Pane):**
  - Supplier: MINERVA
  - Priority: 2, Supplier no.: 0
  - Address: 1 OXFORD STREET, CARDIFF, CF24 3WY
  - Contact person: [Empty]
  - Telephone no.: [Empty]
  - Fax: [Empty]
  - Email address: [Empty]
  - External account ID: [Empty]
  - External account: [Empty]  Outdated

- Select **New** and then enter the name of the supplier in **Selected supplier**.
- A **Priority** can be assigned and Auditbase will list the suppliers by priority and then alphabetically. Each supplier must have a unique **Supplier no** assigned to it.
- The supplier's address and contact details can be added to the appropriate fields.
- Click **Save** to save new or altered information to database.
- Select **Outdated** if you want to outdate a supplier.
- Click **Delete** to delete a defined supplier from database.

## 13.30 Manufacturers

In this dialog, you can define manufacturer with name, number and priority.

To open the dialog, select **Stock -> Settings -> Manufacturers** from the Stock module.

- To add a new manufacturer, click **New** and enter the name. The manufacturer number is added automatically.
- Specify a **Priority** for the manufacturer.
- To edit a manufacturer, click an existing manufacturer and make the required changes.
- A manufacturer can be configured to include alphabetic characters in all their serial numbers. Certain alphabetic characters are never used, (see text warning for list of these) this is done according to the system used by Phonak. This allows sequences of serial numbers to be created including alphabetic characters. A text note will appear on the **Register for stock** dialog when a manufacturer with this setting is selected. Even when only numbers are used for first and last serial numbers, the alphabetic characters will be used in between.
- To mark a manufacturer **outdated**, select the corresponding checkbox
- One or several barcodes can be specified for the manufacturer. If a manufacturer produces articles in different countries, it is necessary to register more than one barcode ID.

- The name of the barcode depends on the barcode type used. This is defined by the system administrator.
- Auditbase uses barcodes to recognize an item via scanning with a barcode scanner attached to the computer.
- Click **Save** to save the new or modified record.
- Click **Delete** if you want to delete a record.

## 13.31 Article types

In the Stock module, go to **Stock** -> **Settings** -> **Article types**. From this menu item a window is retrieved in which types of articles can be defined.

The screenshot shows the 'Article types' window. The title bar is 'Article types' with a close button. Below the title bar are four buttons: 'New', 'Save', 'Delete', and 'Close'. The main area is split into two panes. The left pane, titled 'Article types', contains a list of article types: BATTERY, BEDSIDE MASKER, DIAGNOSTIC, DIGITAL BTE, HAFITTING, LIBBY HORN TUBING, LOUDSPEAKER, MODULAR ITE, NORMAL TUBING, OTOSTOP, PRESENTATION BOX, PROGRAMMABLE BTE, REHABILITATION, STAYE DRY TUBING, SYRINGE, THERAPAK, and TINNITUS BTE MASKER. 'BATTERY' is selected. The right pane, titled 'Article type', has a text input field containing 'BATTERY' and a 'Priority' field containing '1'.

- Select **New** and then enter the name of the **Article type** in **Selected article**. A **Priority** can be assigned and Auditbase will list the types by priority and then alphabetically.
- Click **Save** to save a new or changed article type in the database.
- Click **Delete** to delete a defined article type from the database.
- Click **Cancel** to close definitions of article types.

## 13.32 Order levels

In the Stock module, go to **Stock -> Settings -> Order levels**. Select this function to type ordering levels for defined articles. Two levels can be typed, urgent level and an ordering level which is used at bulk purchasing or for the purchase of more than one article from the same supplier.

Article	Stock type	Article ID
BE102H	STOCK - GWH (In stock)	50388
ITE10MR	BATTERIES IN STOCK (	
ITE10ML	HOLDING STOCK	
ITE11MR	Louisa's sorting (In stoc	
ITE11ML	STOCK - PAEDS (In stoc	
BE101	Sent to manufacturer (In	
BE101B	UNTRACEABLE (In Stoc	
BE101G	STOCK - DV BOX	
BE102HF	STOCK - OUTREACH	
BE103	STOCK - SAVERNAKE	
BE105	From repair sample	
BE18	Auto created - 1	

Article ID: 50388

Article: BE102H

Enable ordering level

Point of ordering:

Point of warning:

- Select article and stock location for article.
- Type number in the fields **Point of ordering** and **Point of warning**.
- Click **Save** to save levels in the database.
- Click **Cancel** to close this function.

## 13.33 History

By activating this function all changes made in the field Stock type for a specific serial number are displayed. Select the specific item in **Stock** and go to **Functions -> History**.

History				
Article <input type="text" value="NHS SUPPLIES, ITE11MR, 444"/>				<input type="button" value="Close"/>
Date	Stock type from	Stock type to	Client	Note
21/04/2015	STOCK - GWH (In stock)	FITTED/EXCHANGED (Issued)	MRS FIRSTNAME106 LASTNAME106	fi
21/04/2015		STOCK - GWH (In stock)		Register for stock -, fi

Date of change, new stock type and client together with the option to add a note concerning changes is shown.

## 13.34 Fast accessories issue

The “Fast accessories issue” dialog allows users to quickly select several different accessories (quantity-controlled articles) of any quantity and issue them in one step. To enable fast selection of the articles we have the traditional Stock Group and Manufacturer route plus three new fast-to-access ways that accessories are grouped together.

Lists of accessories can be created including associated articles.

### 13.34.1 Creating lists of accessories

The “Frequently used accessories lists” are the third option for populating articles on the “Fast accessory issue” dialog. They enable users to select from lists of articles that you can construct based on what you have issued in the past or on articles that you add to the list manually. You can make different lists for different groups of users or patients such as one for Hearing Aid users and one for Cochlear Implant users.

Lists of accessories can be added in the **Stock** module from **Settings -> Frequently used accessories**.

Enter a name for the new list and set a **Location** and/or **Department** if required. Select **Save**. Once you have saved the list, you can add quantity-controlled items in two different ways and combine them, from those recently issued and by manual selection. Firstly:



Search most issued accessories ✕

Stock groups

Quantity 2  
BATTERIES (Quantity-Acce  
 Service-Accessory  
 TINNITUS DEVICES

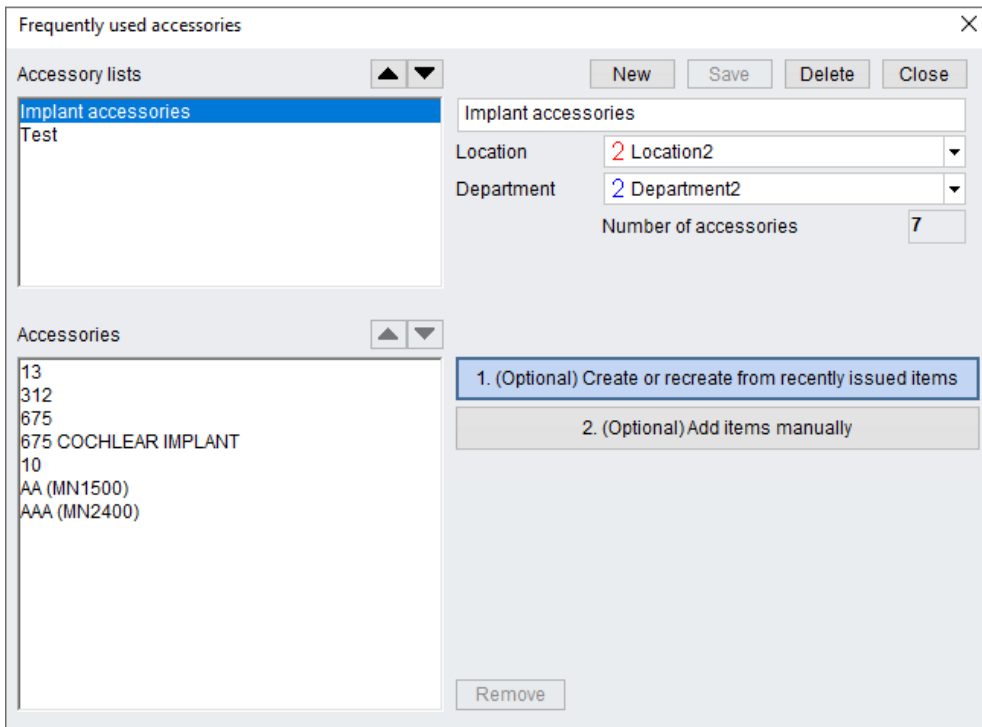
Date from  to

Maximum rows in result

Selection result  Select all

	Article name	No. of issues
<input checked="" type="checkbox"/>	13	6265
<input checked="" type="checkbox"/>	312	401
<input checked="" type="checkbox"/>	675	274
<input checked="" type="checkbox"/>	675 COCHLEAR IMPLANT	120
<input checked="" type="checkbox"/>	10	17
<input checked="" type="checkbox"/>	AA (MN1500)	11
<input checked="" type="checkbox"/>	AAA (MN2400)	5

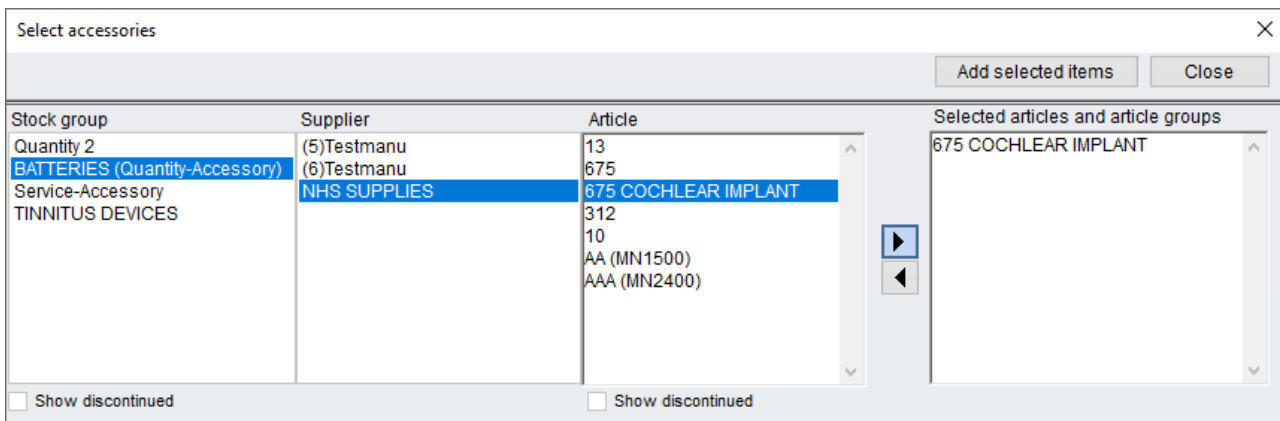
You can either **Select all** articles, which is the default setting, or select articles using the check boxes to the left of the **Article name**. Once you have selected the appropriate articles press the **Recreate list** button in the bottom right to populate or repopulate the accessory list.



Articles can also be added manually to the list using the second option.

## 2. (Optional) Add items manually.

This option opens a window where you can choose accessory articles from the stock module using the standard grouping hierarchy.



Select a **Stock group**, **Manufacturer** and **Article** and use the arrow to move the article to **Selected articles and article groups**. You can **Show discontinued** stock groups or articles by checking the appropriate box. **Add selected items** will add these articles to the previously selected list. **Close** will close the window without moving any articles and take you back to the **Frequently used accessories** window.

Once you have created your list, **Close** will close the window. **Delete** will remove the selected **Accessory list**. Another list can be created by selecting **New** and re-starting the process.

The up and down arrows in **Accessory list** and **Accessories** will move the lists and the articles in the list so that they are in your preferred order.

When articles are set as 'Discontinued' they will be removed from lists automatically but Article Groups will not, so they must be removed manually.

### 13.34.2 Opening 'Fast accessories issue'

Fast Accessory Issue dialog can be opened in a number of ways, the quickest is to press **Ctrl+F10** on your keyboard. There are also buttons in **Stock -> Functions -> Fast accessories issue** or **Device list -> Accessory issue** or **Client Information -> Devices tab -> Accessory issue**. Using these ways the same window will open with the same selection filter showing the previous **Accessories issued to the client, in date order**.

The **Issue details** on the right side of the window are similar to other stock new status functions and need to be set first. Select the **From stock type**; this selection will be remembered for the next time you issue accessories. The **To stock type** will default to the option selected in the stock type set up in the System Administration tool but can be changed manually by selecting from the drop-down list. The **Date** will default to today's date but can be adjusted if required. Select an **Invoice type** and **Reason to issue** if required and choose whether the **Invoice** should be assigned to **client** or to **customer**.

### 13.34.3 Filtering potential articles

There are three other possible filters in the **Filter articles** area to get you to the accessories you need as quickly as possible.

- **Accessories issued to the client, in date order.** This will show a list of all the accessories that have been issued to the client previously so you can quickly reissue.
- **Manufacturers of current devices and Accessories linked to current devices.** Selecting this option will display:
  - All accessories from the Manufacturer of the client’s current articles.
  - All the accessory articles which are linked, in the article set up, to devices that have been issued to the client.
- You can **Limit to Stock group** and select from the drop-down box which stock group the accessory list will be limited to. Sorting results will be in the order:
  - Accessories linked to articles
  - Article groups from suppliers
  - Articles from suppliers
- Articles that have been grouped will display the group name. If the group is expanded, the **Accessory in Group** is shown in the next column.

Accessory/Group	Accessory
<input checked="" type="checkbox"/> NHS SUPPLIES, TEST BATTERY GROUP	
└	675
└	312
NHS SUPPLIES, 13	
NHS SUPPLIES, 675 COCHLEAR IMPLANT	
NHS SUPPLIES, 10	
NHS SUPPLIES, AA (MN1500)	
NHS SUPPLIES, AAA (MN2400)	

- **Frequently used accessories from list.** Any lists of articles created in the **Frequently Used Articles** dialog will be shown in the drop-down menu and the contents of the one you select will be displayed in the **Accessory/Group** window.
- **Select by Stock group and Manufacturer.** This selection will default to **All groups** for **Stock groups** and **All** for **Manufacturers**. If you select one **Stock group** the **Manufacturer** defaults to **All in stock group** but you can also then filter on any one **Manufacturer** from that Stock Group. Sorting will be:
  - Manufacturer
  - Article group
  - Articles

### 13.34.4 Selecting the accessories to issue

Once you have selected the appropriate filter for the articles, they can be selected by highlighting the **Accessory/Group** or **Accessory in Group**, if an article has been grouped and

expanded, and using the right facing arrow or by double clicking, move the article to the right-hand side of the window. An **Ear** side can be selected before moving the article by checking the appropriate box, otherwise it will default to **N/A**.

**The fastest way to select accessories to issue without side is just to double-click on as many as you need.**

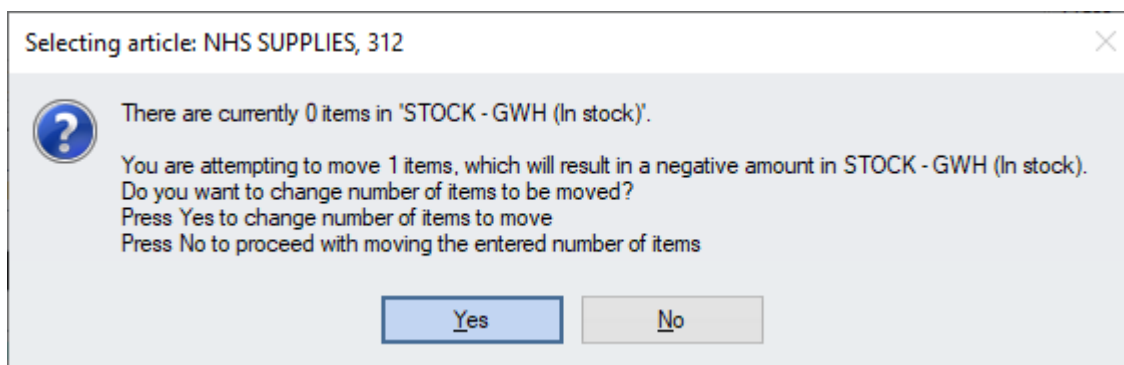
The number of articles can be adjusted by using the **Qty** selection before moving the article or after using the plus and minus buttons.

The article can be removed using the X button.

Accessory	L/R	Qty.				Stock
NHS SUPPLIES, 675 COCHLI	-	2	+	-	X	25
NHS SUPPLIES, 10	-	3	+	-	X	9
NHS SUPPLIES, AA (MN1500)	L	1	+	-	X	8

### 13.34.5 Stock level control

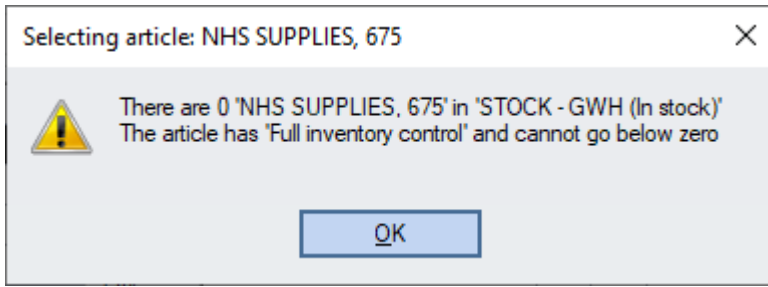
The number of articles in stock are shown in the **Stock** column. If there are no articles in stock, an information window will open.



Selecting **Yes** will enable you to change the article or number of articles being issued. The number selected will automatically change to the number of articles in stock. **No** will allow you to issue the article but will result in a negative number in the stock module and will be shown in red.

NHS SUPPLIES, 312	L	1	+	-	X	0
-------------------	---	---	---	---	---	---

If Full inventory control is set for an article, an information window will warn you that the stock article cannot go below zero.



You will only have the option to **OK** and return to the **Fast accessories issues** window and select another article. You will need to register additional articles into the stock module before you can issue a **Full inventory control** article which is at zero stock.

Using the left facing arrow will remove an article from the list to be issued to the client. The double arrow will remove all articles in the list.

### 13.34.6 Completing the issue

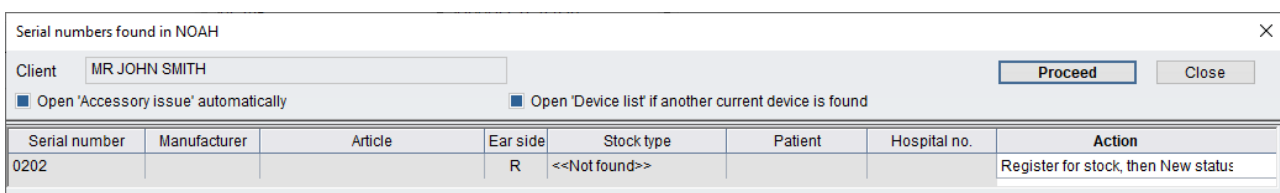
**OK** will issue the selected accessories to the client with the chosen options. If an Automatic Journal Event is set for issuing stock, a single entry will be added to the Journal which just states **Article released to client**.

If **Show confirmation request on stock article issue** is switched on for a user, this will not display if a number of accessories are issued to a client using **Fast accessories issue**.

**Close** will close the window without saving any articles to the client.

### 13.34.7 Issuing accessories from Noah

Accessories can be issued directly from the Noah stock dialogue. If **Open 'Accessory issue' automatically** is checked, once the new status for a device has been changed and any automatic journal events have been added to the Journal, the **Fast accessories issue** window will open with the filter **Manufacturers of current devices and Accessories linked to current devices**.



## 14 Journal

*Click the button below to access our training materials.*

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The Journal module is used to create and review client journal text. The main screen consists of an upper area that shows existing records and a lower area used for entering new records.

To view the **Journal** a client must first be selected. Some of the **Journal** entries are automatically entered and some must be entered manually.

Reading the complete **Journal** can be time consuming and some of the entries may not be relevant. This is where the **Search string** is used. By choosing an appropriate string, only the entries concerned with the relevant event are viewed. If all entries need to be viewed then **All** should be selected. Search strings (keywords) and date is typed for every entry made in the selected client's record to provide easy access to information and ensure that once information has been saved it cannot be changed.

To enter text manually into the **Journal**, type the required text into the **Input text** box. This text can then be formatted. When the text is formatted as required, click **Save**. Once the text has been saved it cannot be altered or deleted from the database for medico-legal reasons. If a mistake is made another entry explaining the mistake must be entered. The entered text will appear in the **Journal Text** window and is sorted by date either ascending or descending as required.

When entering text to the journal for a client, search strings should be selected so that the corresponding text is displayed in the upper part of the window while the new text is in the lower part.

**Signature** will indicate which employee is typing the text and can be changed here. The default is the logged in user.

Journal text formatting options are available from the top window bar or via right mouse clicking, when typing in text.

## 14.1 Journal overview, appearance and layouts

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- To open the module, go to **Navigation -> Journal** or press **Shift+Ctrl+J**.

The module is divided into four tabs: **View**, **List**, **Treatment summary**, and **Individual Management Plan**.

There are two tabs for journal text:

- The **View** tab shows a print layout view of the journal text.
- The **List** tab is a list of journal records ordered with time as well as date that you can select and edit, sign or delete. Unsigned journals will be deleted permanently. Signed journals will be marked deleted, but you can see the deleted signed journals by checking the deleted box. Unsigned entries appear in red. Records marked as **Deleted** are shown as crossed-out on the List tab or are marked with a text comment on the View tab.

### Journal layout

In both tabs, you can toggle between the following layouts:

- **Normal** layout is used for viewing and editing journal text at the same time. With this layout, a larger section of the screen is available for existing records and a smaller section for editing.
- **Edit** layout is also intended for viewing and editing journal text at the same time, but with this layout a larger section of the screen is available for editing.
- **View** layout is used for viewing journal text only. With this layout, the screen contains no record editing area.

To toggle the layout, use the buttons in the upper right corner of the screen.

### Zoom

The view of the journal on the screen is adjustable via the **Zoom** option. However, **Printing** the journal produces the layout of the screen without the zoom. You can change the default margins used for **Keywords** and **Text** in the **View to limit the paper consumption when printing journals**. This can be done by the System Administrator.

### Filtering

In the **View** and **List** tabs you can filter the records by checking the following boxes:

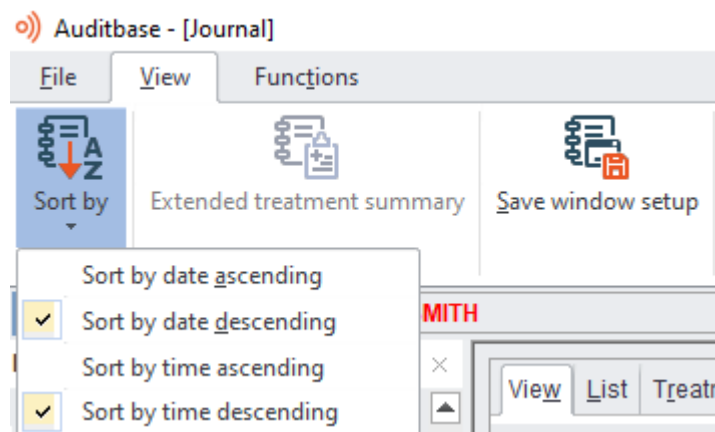
- Unsigned
- Signed
- Deleted

Filtering can also be done per keyword, which is explained in the next chapter.

The **Show all (F11)** button on the View tab forces all journal records to be shown. The System Administrator can define the settings for the whole site to make Auditbase limit the number of records to be shown automatically on the **View** tab. This may be useful where clients have a very large number of entries that may take some time to load. However, the user can select his or her specific settings in the Administration tool as well. The **Show all** button overrules these settings.

## Sorting

By choosing the **View** menu item, you can sort the journal text ascending or descending by date and time. Time can be viewed in the **List tab**, edit section.



## Date

Auditbase automatically enters today's (system) date, but this can be manually altered if required.

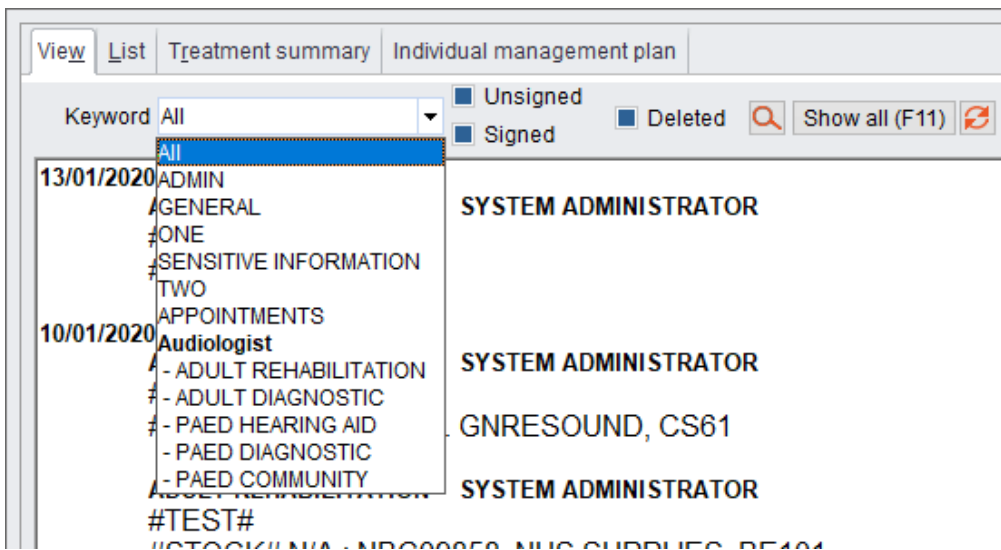
## Save window setup

- To save the window setup, choose **View -> Save window setup**.
- The saved settings are:
  - The current keyword group or keyword
  - The font on the current cursor
  - The zoom level

## 14.2 Keywords

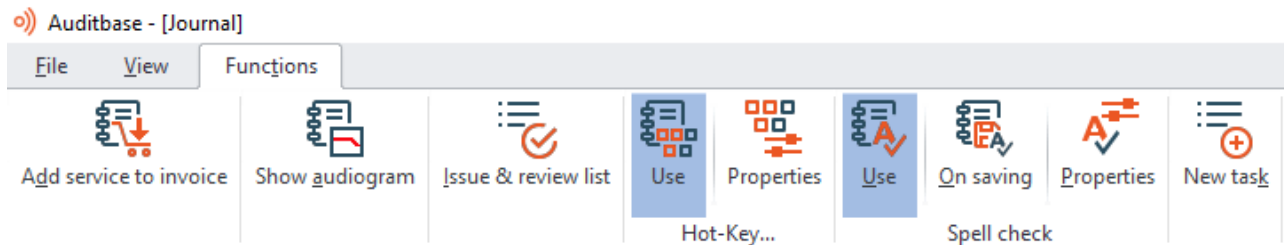
You can select a keyword from the keyword drop-down list to view a specific type of journal entry. The keywords are set up by the System administrator. All entries will be linked to a keyword and you can then view journal entries of a specific type. Keywords are linked to different keyword groups in system settings. A keyword can be part of more than one keyword group.

In System Administration settings, the administrator can define user rights linked to specific keywords, for instance the right to enter journal keyword entries and read keyword entries or the right to sign and delete specific keyword entries. If a user does not have the right to read journal entries, the user can only see the keyword header, but not the journal text.



## 14.3 Use of hot-keys

- To speed up the process of entering text into a journal, you can make use of **Hotkeys**.
- Hotkeys can also be used in auto journal event pop-ups.
- If the system administrator has provided you with extended rights for this, the hot-keys are created in the **Journal** module for the whole site.
- Select **Use hot-keys** under the **Functions** menu.



- Once the feature is selected you can enter **Hot-key properties**.

The 'Hot key properties' dialog box contains a 'Print list' button, 'New', 'Save', 'Delete', and 'Close' buttons. It features a table of hot keys and a detailed view of the selected hot key.

Number	Name
01	Repair appt
02	Earmould booking in
03	Postal repair
04	Inappropriate C&B referral
05	Battery enquiry
06	Lost aid fee - paid
07	Replacement hearing aid
08	Lost aid on Ward funds trans
09	Lost aid fit
10	D.ref
11	AGR
12	Fitting
13	Follow up

Selected hot key details:

Number: 01  
 Name: Repair appt

Text to insert:

**General info given** : went over different programs today and how to clean the mould/corda. talked about adaption to amplification  
**Batteries:**  
**Outcome:** Appointment complete / Further appointment required.

Formatting buttons: B, I, U, Blue, Red, Black

- Click on **New** to enter a new hot-key.
- First enter a **Number** for the hot-key – all numbers below 10 will have a 0 placed before them, i.e. 01, 02 etc.
- Enter a **Name** for the hot-key – not mandatory.
- Enter the **Text to insert**.
- Once you have created a whole list of hot-keys, you can print the list by clicking on **Print list** – this will give you easy access to all hot-keys instead of having to look them up in the system.

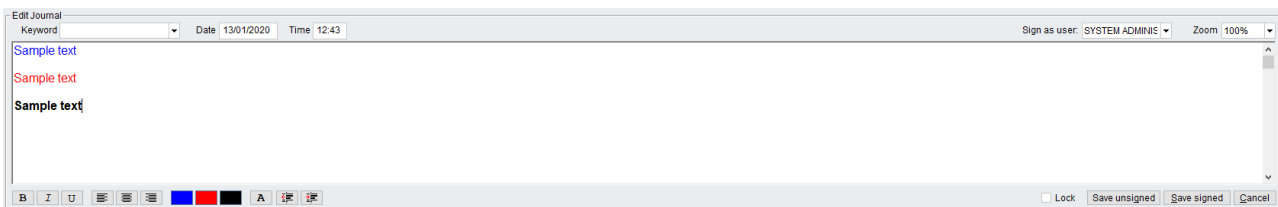
- Once back in the journal, the hot-keys are accessed by placing the cursor in the text field and pressing **Ctrl+Shift+[number]**.
- Example: For the hot-key created in the screen shot above, the short cut would be **Ctrl+Shift+03** (not just Ctrl+Shift+3).
- The text is then displayed in the text field.

## 14.4 Entering journal text

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **View** or **List** tab.
- Select an appropriate keyword from the drop-down list for the journal entry.
- Enter the required text in the text box.
- The text can be formatted to bold, italics, black, blue or red, and it can be aligned to the right, centre or left via the formatting buttons. Text font can be changed as well.
- The Users default font settings can be saved using the **View** -> **Save window setup** – make sure the font is selected in the **Edit** window beforehand.
- Click **Save unsigned** to save the entry unsigned. You can also lock the new record from being signed by checking the **Lock** box.

OR

- **Save signed** Sign as user drop-down list



- The **Date** and **Time** that a journal entry is saved is locked by default unless the user has the extended right to choose date/time of record.

*Your System Administrator decides whether or not you have the right to save a journal unsigned, so you may experience that the button **Save unsigned** is disabled if you do not have the extended user right to save unsigned.*

*It is important to check the client's name regularly to make sure you are working with the correct client.*

*On PCs in slower networks your System Administrator can configure a checkmark to not 'Refresh Journal view after saving' to prevent you having to wait while the Journal refreshes.*

## 14.5 Editing a journal entry

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- To open the module, go to **Navigation -> Journal** or press **Shift+Ctrl+J**.
- Select the **List** tab.
- Mark the check box for the record you wish to edit. Note that only unsigned records can be edited.
- Edit the text in the text box at the bottom of the screen.
- Click **Save unsigned** to save the entry unsigned. You can also lock the new record from being signed by checking the **Lock** box. If the journal record was created by another user, the system will overwrite the value of the **Created by** column with your name.

OR

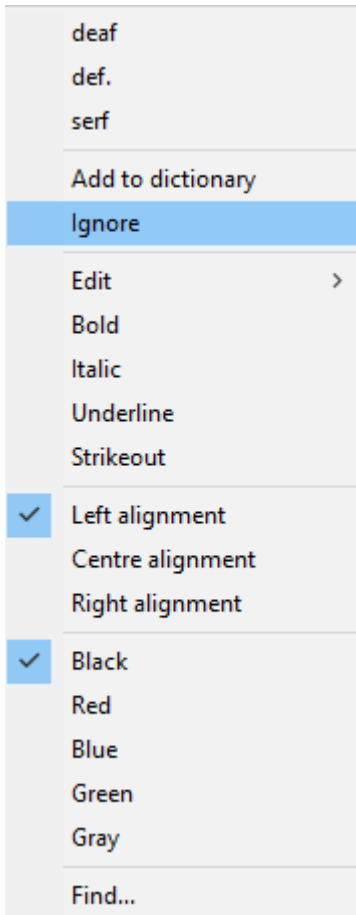
- Click **Save signed** to both save and sign the entry at the same time. You may select user signature in **Sign as user** drop-down list (logged in user is selected by default). The system will put your name to the **Signed by** column of the list.

The screenshot displays the Auditbase Journal application window. At the top, there is a menu bar with 'File', 'View', and 'Functions'. Below the menu bar is a toolbar with various icons for actions like 'Add service to invoice', 'Show audiogram', 'Issue & review list', 'Use', 'Properties', 'On saving', 'Properties', and 'New task'. The main area shows a client selection dropdown set to '<T>T18765 MR JOHN SMITH' and a user dropdown set to 'SYSTEM ADMINISTRATOR'. Below this is a table of journal entries with columns for 'Create date', 'Keyword', 'Created by', 'Signed by', and 'Lock'. One entry is selected with a checkmark. At the bottom, there is an 'Edit Journal' form with fields for 'Keyword' (APPOINTMENTS), 'Date' (10/01/2020), and 'Time' (10:56). The form contains the text: 'Appointment PHAC new patient mould- with Res109 on 10/01/2020 13:15 - 13:30 was moved to cancellation history having a status of Q/ Cancelled'. There are also buttons for 'Sign', 'Delete', 'Print', 'Lock', 'Save unsigned', 'Save signed', and 'Cancel'.

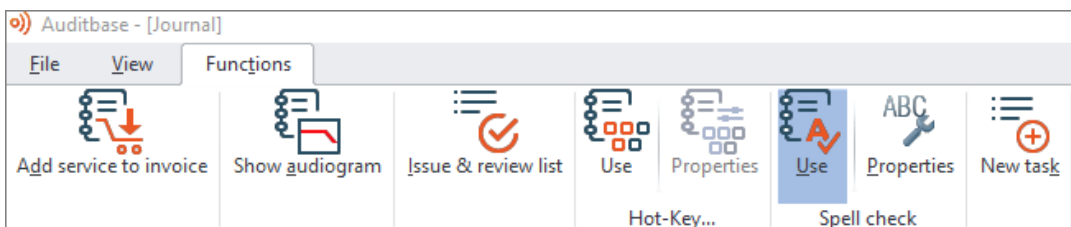
	Create date	Keyword	Created by	Signed by	Lock
<input type="checkbox"/>	13/01/2020 12:37	ADULT REHABILITATION	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 17:05	ADULT REHABILITATION	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 16:51	ADULT REHABILITATION	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 11:25	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 10:56	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input checked="" type="checkbox"/>	10/01/2020 10:56	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 10:52	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 10:50	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 10:47	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	
<input type="checkbox"/>	10/01/2020 09:20	APPOINTMENTS	iryna skladana	iryna skladana	
<input type="checkbox"/>	10/01/2020 09:13	APPOINTMENTS	iryna skladana	iryna skladana	
<input type="checkbox"/>	10/01/2020 08:51	APPOINTMENTS	iryna skladana	iryna skladana	
<input type="checkbox"/>	09/01/2020 17:42	APPOINTMENTS	SYSTEM ADMINISTRATOR	SYSTEM ADMINISTRATOR	

## 14.6 Use of spell checking

Another feature of the journal is the spell checking tool, activated while typing text to the input window. This works in a very similar manner to Word. Incorrectly spelt words will either be auto corrected if the word is already in the dictionary or will be highlighted. It will suggest spelling options when the highlighted word is right clicked. A window will appear giving spelling options to choose from. The misspelt word can be ignored or added to the spell check dictionary.

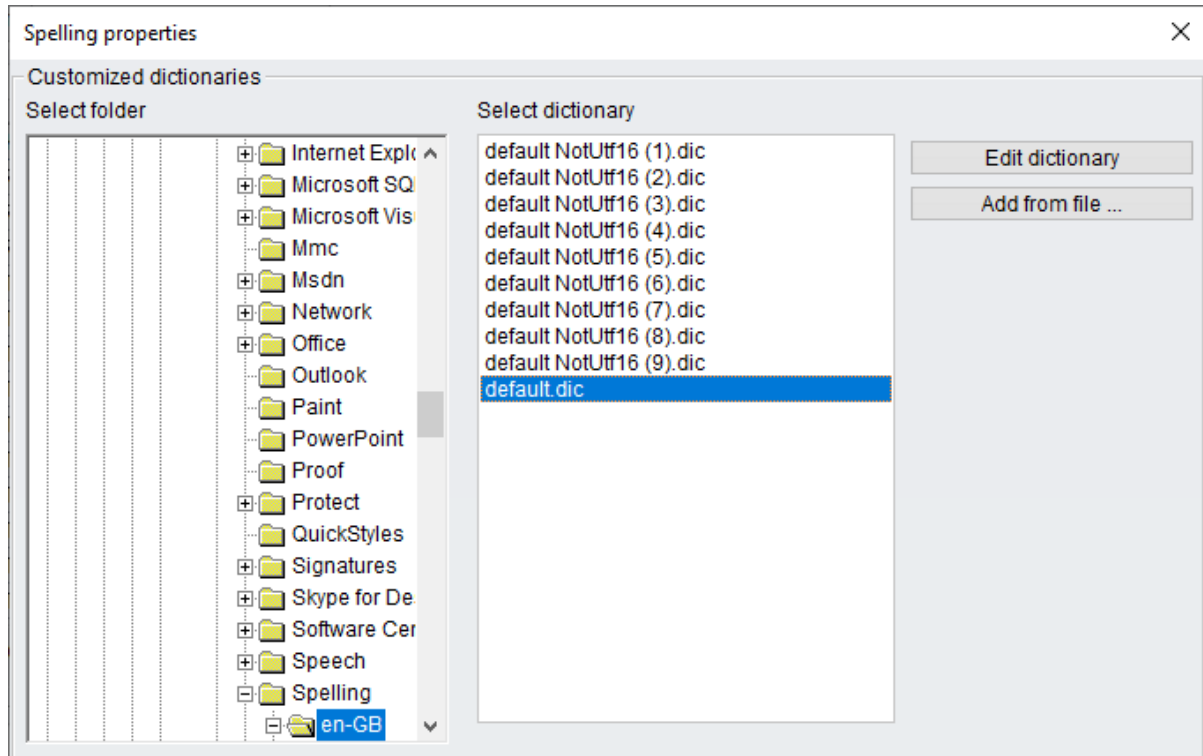


- Spell checking is disabled /enabled by right clicking and choosing **Disable spelling/Enable spelling** or via the **Functions** menu -> **Spell check** -> **Use**



### 14.6.1 Customising the spell check dictionary

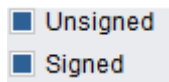
- As well as adding words to the dictionary as you type, the dictionaries that are used by the spell check can be adjusted by using **Properties**. A window opens where the default dictionary can be edited if required. Words that have been added to the dictionary will be displayed in the default.dic.



- Selecting a dictionary and then **Edit dictionary** will open a note pad where the words in the dictionary can be edited or added to.

## 14.7 Signing a journal entry

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- To open the module, **Navigation -> Journal** or press **Shift+Ctrl+J**.
- Select the **List** tab.
- All journal records are either unsigned or signed.
- An unsigned record can be modified and is shown in red. A signed record cannot be modified. However, you can mark it as deleted. A signed record is shown in black.
- You can view the signed records, the unsigned records or both kinds by checking the



boxes **Unsigned** and **Signed**.

*Signing the record also means saving it. If a mistake is made, another entry explaining the mistake must be entered.*

- Check the boxes for the records you wish to sign. You can sign more than a single record at a time.
- The system automatically signs with the name of the logged in user, but this can be manually altered if required in the **Sign as user** drop-down list.
- Click **Sign**.
- The records are now shown as signed in black on the list.
- If unsigned journal text is included in a treatment summary, this text can be signed along with the summary, if this operation is allowed by the system administrator.

*Any unsigned journal record can be locked to avoid it being signed until the text is finalized. To lock a record, check the **Lock** box in the edit area and save it unsigned.*

## 14.8 Finding unsigned journal entries

- To find unsigned journal entries, go to **Navigation -> User Tasks -> Attention list** and choose the **Unsigned journal** tab.

Attention list
✕

Do not show a warning message   
 D-Alert selection method: PAS alert

Referrals   
 Journal   
 Unsigned journal   
 Unsigned summaries   
 Deceased alerts   
 Electronic submission

Unsigned journal records

Date	Hospital no.	NHS no.	Client name	User	Keyword
11/11/2010	T146023		MR FIRSTNAME46023 LASTNAME46023	USER NAME88	ADULT REHABILITATION
26/11/2010	T11194		MR FIRSTNAME1194 LASTNAME1194	USER NAME11..	ADULT REHABILITATION
10/12/2010	T134576		MR FIRSTNAME34576 LASTNAME34576	USER NAME88	ADULT REHABILITATION
12/01/2011	T146604		MST FIRSTNAME46604 LASTNAME46604	USER NAME49..	PAED DIAGNOSTIC
20/01/2011	T13646		MR FIRSTNAME3646 LASTNAME3646	USER NAME89	ADULT REHABILITATION
25/01/2011	T146523		MRS FIRSTNAME46523 LASTNAME46523	Mårten	ADULT REHABILITATION
25/01/2011	T145198		MRS FIRSTNAME45198 LASTNAME45198	Mårten	ADULT REHABILITATION
26/01/2011	T146646		MRS FIRSTNAME46646 LASTNAME46646	USER NAME14	ADULT REHABILITATION
26/01/2011	T145288		MR. FIRSTNAME45288 LASTNAME45288	USER NAME89	ADULT REHABILITATION
26/01/2011	T15809		MRS FIRSTNAME5809 LASTNAME5809	USER NAME93	ADULT REHABILITATION
27/01/2011	T146183		MRS FIRSTNAME46183 LASTNAME46183	USER NAME71	ADULT REHABILITATION
27/01/2011	T146077		MRS FIRSTNAME46077 LASTNAME46077	USER NAME88	ADULT REHABILITATION
01/02/2011	T12569		MRS FIRSTNAME2569 LASTNAME2569	USER NAME29.	ADULT REHABILITATION
30/09/2013	T1106	555554444	MRS FIRSTNAME106 LASTNAME106	full name tests???	ADULT REHABILITATION
30/09/2013	T1106	555554444	MRS FIRSTNAME106 LASTNAME106	full name tests???	ADMIN
30/09/2013	T1106	555554444	MRS FIRSTNAME106 LASTNAME106	full name tests???	ADMIN
02/10/2013	T1106	555554444	MRS FIRSTNAME106 LASTNAME106	full name tests???	ADMIN
17/07/2014	T999911	111222211	Father åæø2 åæø1	full name tests???	GENERAL

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## 14.9 Deleting a journal entry

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- To open the module, go to **Navigation -> Journal** or press **Shift+Ctrl+J**.
- Select the **List** tab.
- Mark the check boxes for the records you wish to delete. You can delete more than a single record at a time.
- Click **Delete**.
- Deleted text is shown by date of creation, with search string and an indication in RED by whom and the date and time when the text was deleted.
- On the **List** tab, signed deleted text is shown as crossed out.
- Unsigned deleted records can either be shown as crossed out, or disappear from the list. This depends on the rights defined by the system administrator.
- If deleted records were filtered out, they are not shown in the list.

*Note that only unsigned text can be physically deleted from the journal. Deletion of signed text only marks the text as deleted. Deleted signed text can be viewed again when you check the **Deleted** box.*

*The system will not allow deleting signed text if the text is included in a treatment summary. To delete the text, exclude it from the summary first.*

## 14.10 Printing and previewing the journal

To print or preview the entire journal for the client's:

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **View** tab.
- Select **File** -> **Print journal** to print a copy of the report on the default printer.
- Select **File** -> **Print preview** to display the report on the screen.

To print selected records only:

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **List** tab.
- Check the boxes for the records you wish to print and click **Print**.

Crystal Reports is the program presenting the preview and from here, the journal can be printed or exported in a selectable format and to the relevant path.

Closing down the preview on the screen is done by clicking **X** in the upper right corner returning to Auditbase Journal.

### 14.11 Issue & review checklist

This function displays a window where you can add more information about a fitting.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Journal** or press **Shift+Ctrl+J**.
- Select **Functions -> Issue & review check list**.
- Click **New**.
- Clicking in the various fields will produce a Y, N or blank.
- Click **Save**.

Issue & review check list
✕

Date	Mould comfort	Aid adjustment	Controls	Batteries	Fitting	Tubing	Maintenance	Progression of use	Use of telephone	Use of telecoil
13/01/2020	Y	Y	Y	N	Y	N	Y	N	N	Y

## 14.12 Individual Management Plan (IMP)

In the Journal module, there is a tab on which you can create an IMP for a client including **Needs, Actions** and **Outcomes**; which can be printed out and an automatic journal event created. A ‘snapshot’ of the IMP can be taken and stored for future reference.

Information documents can be easily printed from the IMP once they have been set up in **Documents and Attachments**. You can choose to store these information documents either as complete documents or by title only.

All columns in all of the tables on the IMP have configurable width set ups. Make adjustments to the column and then right click and **Save user view**. See Section 1.7 for further information.

Your System Administrator can set up the required default fields.

IMP: 26/05/2020, HA issue Client name COLONEL CHARLIE HARPER Refresh Cancel

Print and Store Print information documents New Save Delete

Selected IMP

Started on 26/05/2020 At appointment

IMP type HA issue Created by SYSTEM Admin Audiogram

Referral 12/06/2019, DR HAASSESS Treatment type DR HA ASSESS Referral handling

Agreed needs: Remove

#	Need	Categories	Outdated	Comment
1	Hear TV better	Personal,Public	<input type="checkbox"/>	
2	Hear family better	Public	<input type="checkbox"/>	
3	Hear phone better	Personal	<input checked="" type="checkbox"/>	
4			<input type="checkbox"/>	
5			<input type="checkbox"/>	
6			<input type="checkbox"/>	
7			<input type="checkbox"/>	

Agreed and completed actions: Attach Detach Complete Un-complete Remove

Need	Action	Comment	Compl. date	Appointment
<input type="checkbox"/> 1	Fit two hearing aids		26/05/2020	20/05/2020, SWITCH ON
<input type="checkbox"/>	Position TV better			
<input type="checkbox"/>	Use assisstive device			
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				


Next appointment Book Search and book

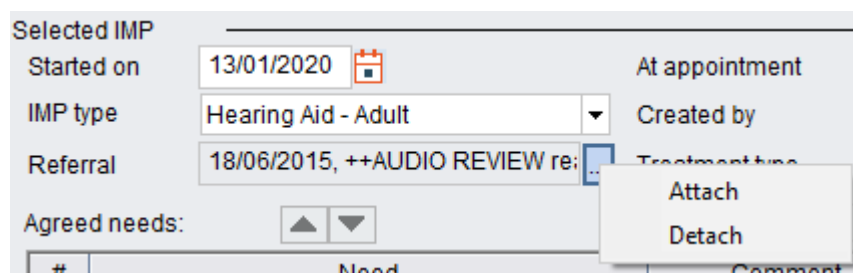
Outcomes: Remove

Need	Outcome	Score	Date
1	All sorted	45	26/05/2020

Shared with patient on IMP finished and patient discharged on:


### 14.12.1 To create an IMP

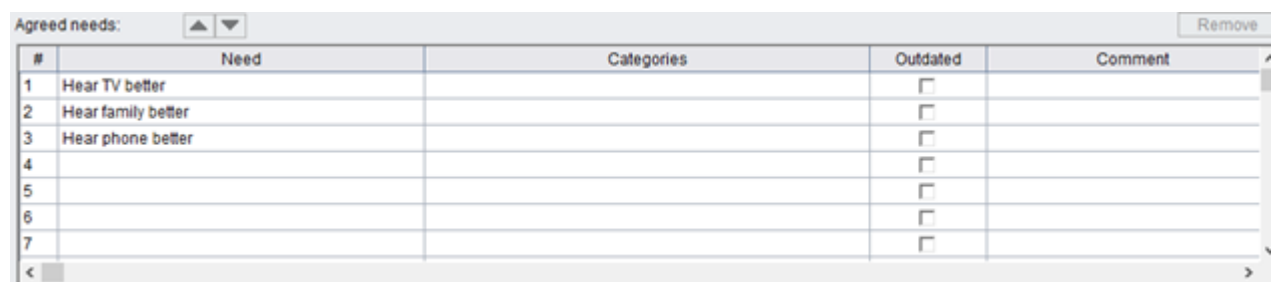
- Choose a Referral using the  icon and click **Attach**.



The screenshot shows the 'Selected IMP' form with the following fields and values:

- Started on:** 13/01/2020 (with a calendar icon)
- At appointment:** At appointment
- IMP type:** Hearing Aid - Adult (with a drop-down arrow)
- Created by:** (empty)
- Referral:** 18/06/2015, ++AUDIO REVIEW re: (with a blue selection box and a context menu open showing 'Attach' and 'Detach' options)
- Treatment type:** (empty)
- Agreed needs:** (with up and down arrow icons)

- The date that the IMP was **Started on** will default to today's date but can be changed manually.
- The **IMP type** will use the default type set by the System Administrator. This can be changed using the drop-down list.
- Created by** will show the logged-on user. This can be changed, only if the user has the extended user right.
- An **Audiogram** for the IMP can be attached by selecting from the icon . Once the audiogram is attached, it can be shown by selecting the preview icon.
- The appointment that the IMP was started on will be shown in the **At appointment** field. If no appointment is shown in this field, one can be added in the same way as adding a referral above. If the appointment is not attached to a referral or attached to a different referral, you will see an information window asking if you wish to link the appointment to the IMP rather than the selected referral.
- Agreed needs** will default to those set by your System Administrator.



The screenshot shows the 'Agreed needs' table with the following data:

#	Need	Categories	Outdated	Comment
1	Hear TV better		<input type="checkbox"/>	
2	Hear family better		<input type="checkbox"/>	
3	Hear phone better		<input type="checkbox"/>	
4			<input type="checkbox"/>	
5			<input type="checkbox"/>	
6			<input type="checkbox"/>	
7			<input type="checkbox"/>	

- Further needs can be added by either:
- Clicking in the **Need** column and selecting from the drop-down menu.

OR

- Clicking in the **Need** column and typing in free text.
- A category for the **Need** can be selected from the **Categories** drop-down menu. Multiple categories can be used by selecting the **Multiple categories...** option. A window opens where you can **Select IMP category**.

Select IMP category
✕

	Name
<input checked="" type="checkbox"/>	Personal
<input checked="" type="checkbox"/>	Public
<input type="checkbox"/>	

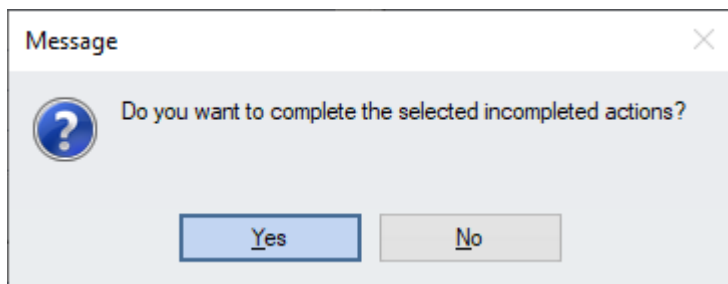
- Check the appropriate categories and then **Select**. The categories will be shown separated by a comma.

Categories
Personal,Public

- The **Need** can be outdated if it is no longer required by selecting the **Outdated** check box. Outdated Needs remain in the list, but they are greyed out.
- A free text **Comment** can be added to Needs by clicking in the **Comment** column and adding text.
- The order of **Needs** can be altered by highlighting an item and using the up and down arrows to move it.
- Needs are linked to actions by clicking in the **Need** column of the **Agreed and completed actions** table and selecting the appropriate need number.

Agreed and completed actions:		▲ ▼
	Need	Action
<input type="checkbox"/>	1	Fit two hearing aids
<input type="checkbox"/>		Position TV better
<input type="checkbox"/>		Use assisstive device
<input type="checkbox"/>		

- If the **Need** in the **Agreed needs** table is re-prioritised, then the **Need** in the Actions table will automatically re-number.
- To remove a **Need**, highlight the text and click **Remove**.
- Actions are added in same way as **Needs**.
- To remove an **Action**, ensure the **Action** is highlighted with the box on the left side checked and then click **Remove**.
- To complete an **Action**, ensure that the box on the left side of the **Action** is checked. Select **Complete** and an information message will ask if you wish to complete the action. Select **Yes**. Selecting **No** will cancel the operation.



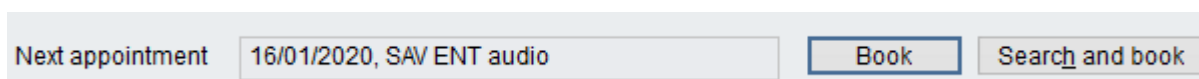
Once an **Action** has been completed, it will be highlighted in green text. The date of completion defaults to the current date, but can be edited by clicking in the **Compl. date** column and typing in the required date.

Agreed and completed actions:						Attach	Detach	Complete	Un-complete	Remove
Need	Action	Comment	Compl. date	Appointment						
<input checked="" type="checkbox"/>	1	Fit two hearing aids	26/05/2020	20/05/2020, SWITCH ON	BERTA					
<input type="checkbox"/>		Position TV better								
<input type="checkbox"/>		Use assisstive device								
<input type="checkbox"/>										

- If only one appointment occurs for the client that day, and the appointment start time is earlier than the current time, then the action will be attached to that appointment. If this is not the correct appointment, it can be removed by checking the relevant box and selecting the **Detach** button. The correct appointment can be added by selecting **Attach** and choosing the correct appointment. If the appointment is attached to a referral, the **Referral** field will be filled in automatically.
- If the incorrect Action was completed, select **Un-complete** to remove the Action from the **Completed actions** table.

The next appointment can be booked using the **Book** or **Search and Book** facilities in the same way as for Referrals. See Section 3 for further details.

If a future appointment exists, this will be shown in the **Next appointment** window.



### 14.12.2 To add Outcomes to an IMP

- Choose a **Need** number.

Outcomes:					Remove
Need	Outcome	Score	Date		
1					
2					
3					

- Input any outcome text by clicking in the **Outcome** column.
- Click in the **Score** column to add a free text score. The limits for the score are set by the System Administrator.

- Double-click in the **Date** column to add the current date. This can be edited if required.
- Click in the **Need status** column and select from the drop-down menu of pre-defined need statuses.
- If an **Outcome** should be removed, highlight the **Outcome** and select **Remove**.

Outcomes: Remove

Need	Outcome	Date	Need status
2	Bin fir 6070	14/01/2020	Met partially

Once the IMP has been completed, it can be printed. A snapshot of the IMP can be taken at any time. Both of these actions are performed by selecting **Print and Store**.

**Print and Store**
Print information documents

**Selected IMP**

Started on: 13/01/2020

IMP type: Hearing Aid - Adult ▼

Referral: 18/06/2015, ++AUDIO REVIEW re: ...

- Once **Print and Store** has been selected, a window opens giving you three options.
- **Print** – Will print the full IMP.
- **Snapshot and AJE** – Will take a snapshot of the IMP as it is on the current day. A snapshot is a locked version of the IMP taken on that date, so that the current IMP can be compared to what the earlier state was. The information from the snapshot can be added to the **Journal** as an Automatic Journal Event (AJE) if this is set up by the System Administrator.
- **at appointment** – you can attach the snapshot to an appointment by clicking the button to the right of the field. The button will be disabled if you have not selected **Snapshot and AJE**.
- **IMP has been Shared with patient on (date)** – This will indicate on the main IMP page that the IMP has been shared with the client. The text for this is configurable by the System Administrator.

**Print and Store IMP** ✕

OK Cancel

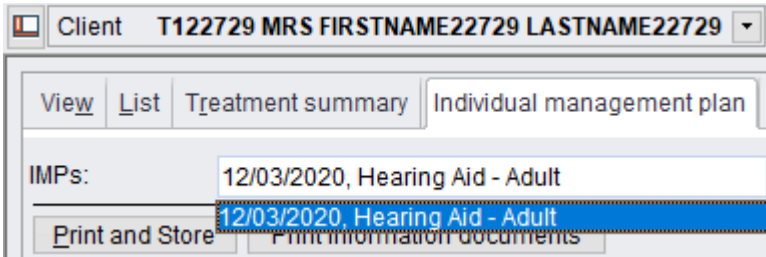
Print

Snapshot and AJE  
at appointment ...

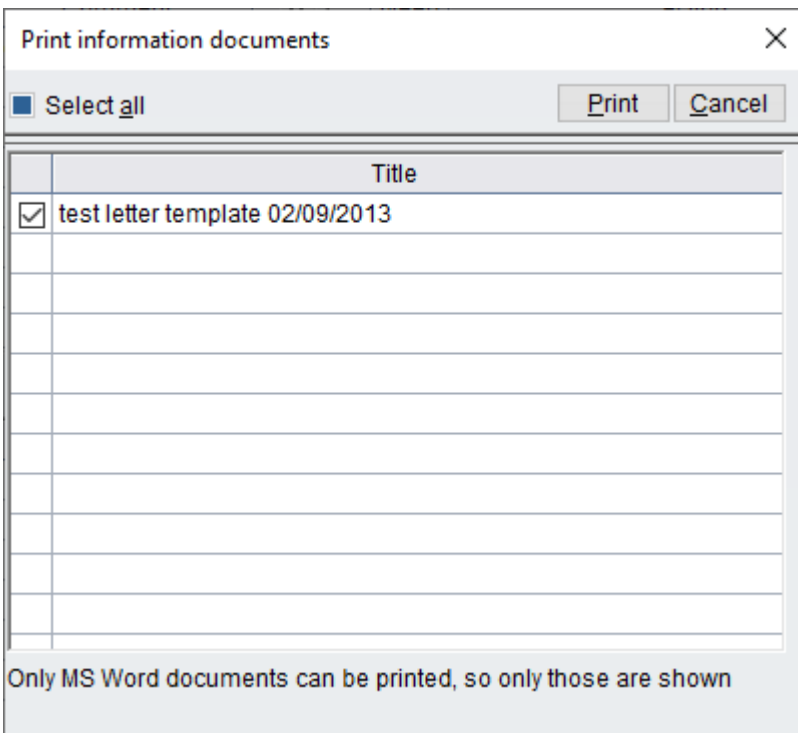
IMP has been Shared with patient on 26/05/2020 ...

Attach  
Detach

- Check or un-check the relevant boxes to choose which action to undertake.
- If a snapshot is taken, the IMP can be seen in the **IMPs** list as a folder item with the snapshot attached to it. The folder icon indicates that an IMP has attached snapshots. If the snapshot is attached to an appointment, it appears under the appointment it is attached to, but not under the appointment the original IMP is linked to.
- If **Print and Store** is selected for a snapshot, only the **Print** option will be active.



- Information documents can be printed out for the client by selecting the **Print information documents** button.
- A window will open with a list of the available documents. These are set by the System Administrator.



- All the documents can be selected by checking the **Select all** box. Individual documents can be selected by un-checking this box and checking the box of the relevant document.
- **Print** will send the document to your default printer.
- **Cancel** will close the window without printing.

Once the IMP is completed, the date of this can be added to the **IMP finished and patient discharged on (date)** field. Double clicking in the box will add the current date or the calendar can be used to add another date.

### 14.12.3 Adding IMP to offline databases


IMPs are copied to the laptop database. However, referrals are not copied, and not all appointments are copied.

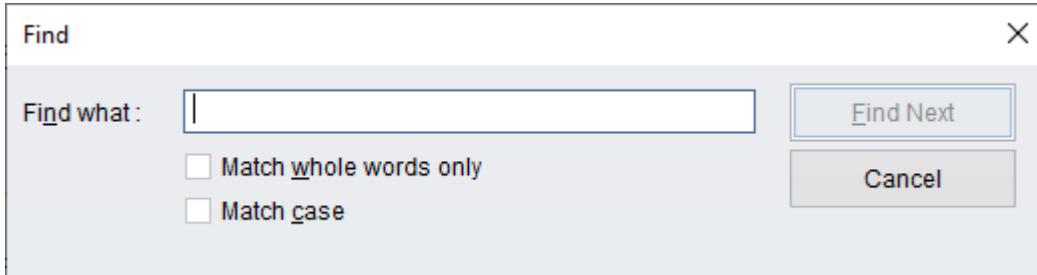
An IMP appears in the offline database as not attached to a referral, and potentially not attached to the appointment it was started at.

Similarly, IMP completed actions can be detached from appointments during copying to the offline database.

However, for IMP snapshots copied to the laptop database, appointment information is copied as well.

## 14.13 Searching the Journal text

The text in a Journal can be searched using the  icon in the upper window or by right clicking in the lower window. A box will open where you can insert the text to be searched.



Depending on which are you are searching, the box will be labeled **Find in upper text** or **Find in lower text**. There are two choices which are selected by checking the box; **Match whole words only** or **Match case**. **Find Next** will search the journal and highlight the searched for word.

**APPOINTMENTS - SYSTEM ADMINISTRATOR**

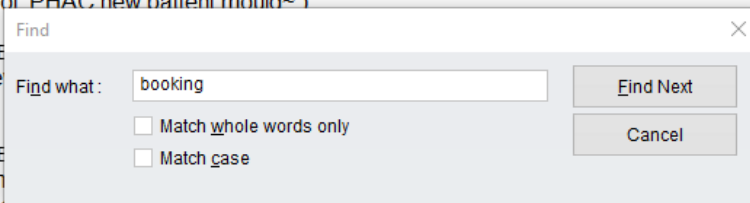
The appointment was movedClient appointment moved: Date: 10/01/2020; **Booking** resource(s): Charlie ( start time: 14:00 - end time: 15:15; Symbol: PHAC.new patient mould~ )

**APPOINTMENTS - SYSTEM ADMINISTRATOR**

Appointment PHAC new patient mould~ status of Q/ Cancelled

**APPOINTMENTS - SYSTEM ADMINISTRATOR**

The appointment was movedClient appointment moved: Date: 10/01/2020; Booking resource(s): Charlie ( start time: 14:00 - end time: 15:15; Symbol: PHAC.new patient mould~ )



cancellation history having a

Res109 ( start time: 13:15 -

**Cancel** will close the box.

## 15 Treatment summary

*Click the button below to access our training materials.*

eLearning

To view treatment summaries for a client, select the client, select the **Journal module** and click the **Treatment summary** tab.


**Treatment summary** consists of two sections. The upper section is a list of existing client's summaries. The lower section is for viewing and entering details about a specific treatment summary.

The lower section can be in either brief or extended form, i.e. showing standard or extended data. This can be toggled on/off by the **View -> Extended treatment summary** menu.

As for journal text, treatment summary can be signed or unsigned. A signed summary cannot be changed, whereas an unsigned summary can be edited. Signed summaries are shown in black in the upper table; unsigned summaries are shown in red.

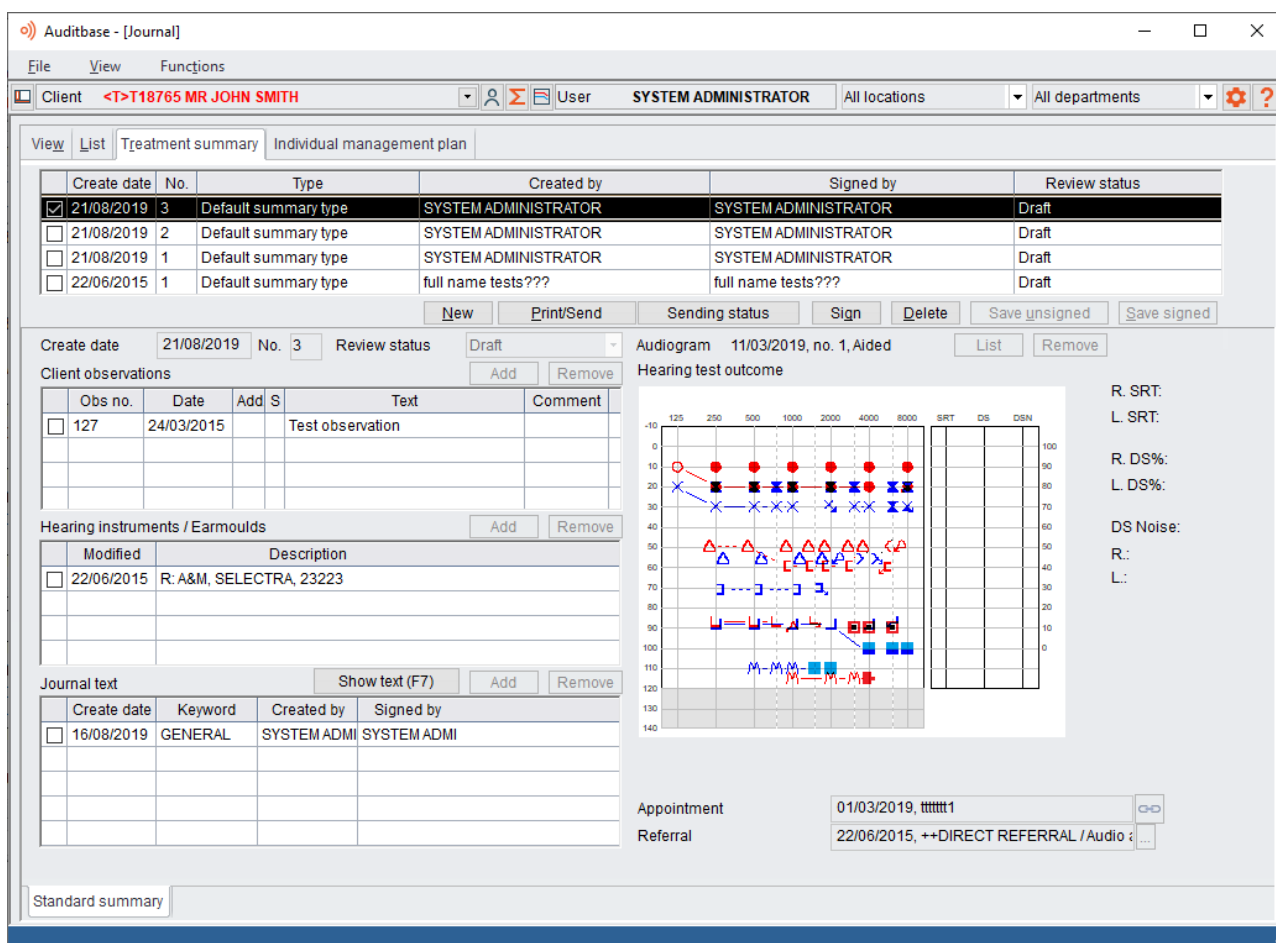
**Be aware:** *Before proceeding, please make sure the correct client is selected to avoid making an incorrect summary.*

## 15.1 Treatment summary overview

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **Treatment summary** tab.
- A shortcut is available in the menu bar. This can be selected from any module .

A treatment summary can contain links to the following data for the client:

- Observations
- Hearing instruments and earmoulds
- Journal text
- Audiogram
- Referrals
- Waiting list entries
- Appointments
- Clinical history
- Tympanometry information



The screenshot displays the 'Treatment summary' interface for client 'MR JOHN SMITH'. At the top, there is a menu bar with 'File', 'View', and 'Functions'. Below the menu bar, the client name and user information are shown. The main area contains several sections:

- Treatment summary table:** A table with columns for 'Create date', 'No.', 'Type', 'Created by', 'Signed by', and 'Review status'. It lists three entries, all of which are 'Draft'.
- Client observations table:** A table with columns for 'Obs no.', 'Date', 'Add', 'S', 'Text', and 'Comment'. It shows one observation on 24/03/2015 with the text 'Test observation'.
- Hearing instruments / Earmoulds table:** A table with columns for 'Modified' and 'Description'. It shows one entry from 22/06/2015: 'R: A&M, SELECTRA, 23223'.
- Journal text table:** A table with columns for 'Create date', 'Keyword', 'Created by', and 'Signed by'. It shows one entry from 16/08/2019 with the keyword 'GENERAL'.
- Audiogram plot:** A graph showing hearing levels and thresholds. The x-axis represents frequency in Hz (125, 250, 500, 1000, 2000, 4000, 8000) and the y-axis represents decibels (-10 to 140). The plot includes data points for Right (R) and Left (L) ears, with lines connecting the points for each ear. There are also markers for SRT, DS, and DSN.
- Appointment and Referral information:** Two fields at the bottom right showing dates and descriptions: '01/03/2019, tttttt1' and '22/06/2015, ++DIRECT REFERRAL / Audio'.

Since a summary contains only links, adding information in the summary only creates a link, and removing information from the summary only deletes a link, but not the information itself.

A summary can be signed or unsigned. Only unsigned summaries can be modified or deleted.

Unsigned summaries are shown in red in the upper table of the summary window; signed summaries are shown in black.

*A treatment summary cannot be signed when it contains no journal text, or unsigned journal text, or an unsigned audiogram, or any data in extra details.*

The **Preview** and **Print** buttons will take you to a selection window, where you chose which recipient to preview or print the summary for.

The lower part of the window contains details of the summary selected using the check box. This lower part is intended for the creation and/or editing of summary details.

The detailed part consequently consists of two further parts. The upper part stores observations, Hearing Instruments and earmoulds, journal text and audiogram.

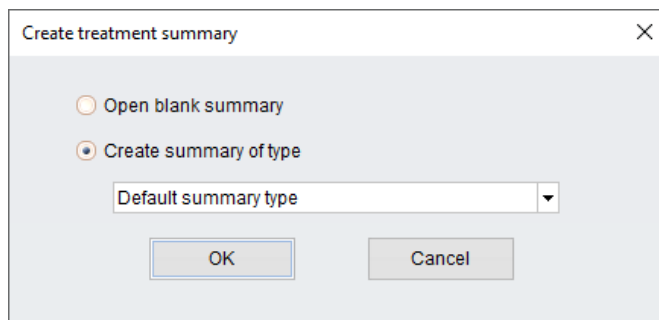
The extra part is visible when **View -> Extended treatment summary** menu is flagged from the menu item **View -> Extended treatment summary**, and contains the tabs **Contact history**, **Clinical history** and **Tympanometry information**.

The screenshot shows the 'Auditbase - [Journal]' application window. The main area displays a table of summaries with columns for 'Create date', 'No.', 'Type', 'Created by', 'Signed by', and 'Review status'. The selected row (No. 1, 01/05/2015) is highlighted in black, while others are in red. Below the table are buttons for 'New', 'Print/Send', 'Sending status', 'Sign', 'Delete', 'Save unsigned', and 'Save signed'. The lower section is divided into several panels: 'Client observations' with a table of observations, 'Hearing instruments / Earmoulds' with a table of modifications, 'Journal text' with a table of entries, and an 'Audiogram' plot showing frequency (125-8000 Hz) vs. dB (0-140). The plot shows hearing levels for Right (R) and Left (L) ears, with 'SRT' and 'DS' values indicated. The 'Appointment' field is empty.

Under **Contact history** you will find referrals, waiting list entries and appointments. The Clinical history will show medical history and questionnaires. **Tympanometry** includes tympanograms with values.


## 15.2 Creating a summary

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation->Journal** or press **Shift+Ctrl+J**.
- Select the **Treatment summary** tab.
- Click **New**.
- In the opened window, click either **Open blank summary** or **Create summary of type** and select a type in the drop-down list.



- Click **OK**.
- The system shows a blank summary or one filled with some details independent of the above selection.

OR

- From any module, click the  toolbar button. The system will create a summary pre-filled with details as configured by the system administrator. The automatically filled details for a new summary can be modified as required.

In the summary details area:

- In both cases the system assigns a number for a new summary and shows any pre-filled summary details in the lower part of the screen, where the details may be modified if required to add client observations or procedures, click **Add** above the table.
- To add client hearing instruments and/or earmoulds, click **Add** above the table.
- To add journal entries, click **Add** above the table.
- To add an audiogram, click **List** above the table.
- In the corresponding windows, select the entry to add.
- In Treatment summary, click **Save unsigned**.

OR

- Click **Save signed** to both save and sign.

*Please note that lower screen section view may show standard or extended details depending on the setting in **View -> Show extended treatment summary** (checked/unchecked).*

## 15.3 Editing a summary

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **Treatment summary** tab.
- Mark the check box for the summary you wish to edit.

In the summary details area:

- Modify the summary date if required.
- To add a client observation or procedure, click **Add** above the table. To remove an observation or procedure, click **Remove**.
- To add a client's hearing instruments and/or earmoulds, click **Add** above the table. To remove an instrument or earmould, click **Remove**.
- To add a journal text, click **Add** above the table. To remove a journal text, click **Remove**.
- To review journal text included in a summary, select the records you want to see in the **Journal text** table by checking the box, and press **Show text**. The system shows a dialog where the text is seen.
- To add an audiogram, click **List** above the graph. To remove an audiogram, click **Remove**.
- To include referrals, check the **Show referrals** box.
- To include waiting list entries, check the **Show waiting list entries** box.
- To include appointments, enter Number of appointments in the past and Number of future appointments.
- Click **Save unsigned**.

Or

- Click **Save signed** to both save and sign.

*Note that only one audiogram can be included in a summary, whereas more than one observation, hearing instrument, earmould and journal record is allowed.*

*Extended summary details can include the client's referrals, waiting list entries and appointments.*

*The summary contains references to already existing data for the client. Therefore, when adding a record to a summary, for instance an observation or procedure or hearing instrument, only a link to the existing data is established, but no new data is created. Likewise, removing a record from a summary only removes the link.*

*Changes made to a summary detail remain only on the screen until the summary is saved.*

## 15.4 Signing a summary

Signing means "locking" a summary and protecting it from changes.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **Treatment summary** tab.
- Check the boxes for the unsigned summaries you wish to sign. You can sign multiple summaries at the same time.
- If defined by the system administrator, any unsigned journal text included in the summary may be signed along with the summary.
- Click **Sign**.
- The selected summaries will become signed and show in black in the table.

## 15.5 Deleting a summary

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Journal** or press **Shift+Ctrl+J**.
- Select the **Treatment summary** tab.
- Check the boxes for the summaries you wish to delete. You can delete multiple summaries at the same time.
- Click **Delete**.
- The selected summaries will disappear from the table.

## 15.6 Printing or previewing a summary

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Journal** or press **Shift+Ctrl+J**.
- Select the **Treatment summary** tab.
- There are two ways of printing a summary:
- Select one or more summaries in the upper table and press **Print**.
- If you just want to print one summary, press the **Print** button below the details area.
- Either way, the **Print summary** dialog opens. In the dialog you can select who the summary should be printed for and the number of copies.
- You can preview the print layout before printing. Please note that the layout for a single summary only can be previewed.
- To preview, select a summary by checking the mark in upper table and press **Preview**. The **Print summary** dialog opens and you can define the recipients.

Print summary
✕

Add recipient   Print   Preview   Send electronically   Close

Summary recipients

	Name	Copies
<input checked="" type="checkbox"/>	GP	1
<input checked="" type="checkbox"/>	DR AALLEN, 3 VALE AVENUE, WANTAGE, OXON, PC:6376	1
<input checked="" type="checkbox"/>	Client	1
<input checked="" type="checkbox"/>	CF ANDERSON, MERCHISTON SURGERY, HIGHWORTH ROAD, STRA	1
<input type="checkbox"/>	ENT	1
<input type="checkbox"/>	DR ASH, KINGSWOOD SURGERY, KINGSWOOD AVENUE, PARK NOR	0
<input type="checkbox"/>	Journal	2
<input type="checkbox"/>		

Print to other recipient

Copies

Name  Postcode

Address

*Please note that a summary print layout can depend on the summary type. This is defined by the system administrator. The system administrator can also define that an unsigned treatment summary is marked with additional text on the print layout.*

## 15.7 Sending status of summary review

There is a possibility of sending the status of the treatment summary electronically instead of printing it:

1. Make sure that the necessary client is selected.
2. Open the **Journal** module and go to the **Treatment summary** tab.
3. In the list of treatment summaries, double-click the summary to open it.
4. Under the audiogram, select the appropriate summary review status.
5. Under the treatment summary list, click the **Print** button.
6. In the **Print summary** dialogue box, select the necessary recipients and click **Send electronically**.

The system will collect submitted summaries and will reflect the acknowledgement status in the treatment summary list.

To review the submission status of the treatment summary, please follow these steps:

1. In the treatment summary list, double-click the necessary summary to open it.
2. Under the treatment summary list, click the **Sending status** button.
3. The **Treatment summary submission status** dialogue box opens. Use the **Edit** and **Delete** buttons to edit or delete the treatment summary status correspondingly.

# 16 Invoice

The invoice module is divided into two tabs; **Postings** and **Invoice**. Postings are orders which are not yet invoiced. When you open the invoice module the postings view is shown by default.

The top part of the screen is a filter. You can use a user defined filter or use filter criteria such as date interval, customer, for instance an insurance company, or invoice type.

The screenshot shows the 'Auditbase - [Invoice]' window. At the top, there's a menu bar with 'File', 'View', and 'Functions'. Below that, the client information is displayed as 'Client T1106 MRS FIRSTNAME106 LASTNAME106'. The user is identified as 'SYSTEM ADMINISTRATOR'. There are dropdowns for 'All locations' and 'All departments'. The main area has two tabs: 'Postings' (selected) and 'Invoice'. Below the tabs is a filter section with a 'Filter' dropdown and a 'Search' area containing fields for 'Cust. group', 'Customer', 'Date from', 'Invoice type', 'User', and 'Show postings'. Below the search area are buttons for 'Save' and 'Refresh'. A table of invoice postings is shown below, with columns for Date, Serial No, Group, Manufacturer, Article, Side, Hospital no., NHS no., Invoice type, Customer, and full name. At the bottom right, there are summary statistics: 'Total price: 1,042.82' and 'Postings count: 43'. A 'NUM' button is visible at the bottom right corner of the window.

Date	Serial No	Group	Manufacturer	Article	Side	Hospital no.	NHS no.	Invoice type	Customer	full name
10/03/2020		PROCEDURES (Service)	ADULT	1		T1106		Invoice type 1		Oleksand
10/03/2020		PROCEDURES (Service)	ADULT	1		T1106		Invoice type 1		Oleksand
18/02/2020	908765432101234	NHS HEARING AID (Serial No.)	NHS SUPPLIES	ITE10ML	L	T1106		Invoice type 1	BRISTOL PCT	SYSTEM /
21/10/2016		PROCEDURES	ADULT	PTA1		T1106		Invoice type 1		full name
21/10/2016		PROCEDURES	ADULT	1		T1106		Invoice type 1		full name
21/10/2016		PROCEDURES	ADULT	2		T1106		Invoice type 1		full name
21/10/2016		PROCEDURES	ADULT	1		T1106		Invoice type 1		full name
18/10/2016		PROCEDURES	ADULT	PTA1		T1106		Invoice type 1		full name
18/10/2016	925104	NHS HEARING AID	NHS SUPPLIES	ITE10ML	-	T1106		Invoice type 1	SWINDON PCT	full name
18/10/2016		PROCEDURES	ADULT	2		T1106		Invoice type 1		full name
18/10/2016		PROCEDURES	ADULT	1		T1106		Invoice type 1		full name
18/10/2016		PROCEDURES	ADULT	10		T1106		Invoice type 1	SWINDON PCT	full name
18/10/2016		PROCEDURES	ADULT	1		T1106		Invoice type 1		full name
06/07/2016		PROCEDURES	PAEDIATRIC	COMMUNITY		T1106		Invoice type 1	SWINDON PCT	full name
05/03/2016		BATTERIES	NHS SUPPLIES	13	-	T1106		Invoice type 1	UNKNOWN PCT	full name
05/03/2016		BATTERIES	NHS SUPPLIES	13	-	T1106		Invoice type 1	UNKNOWN PCT	full name

## 16.1 Symbols



Invoice, in the list



Credit note, in the list



At least one invoice has been credited



All of the invoices have been credited



Invoice, in the Invoice window



Credit note, in the Credit note window

## 16.2 Set up filters

You can apply a filter to the list of postings or invoices.

Two filters are pre-defined for both **Postings** and **Invoices**, **Client** and **All**. These filters are shown and accessed via buttons above the table containing the list of postings and invoices. By default, when entering the invoice module, all postings and invoices for the selected client are listed. If you change the client, the list is updated. If you check the **All** button, all postings or invoices are listed.

You can also create more complex filtering criteria such as pre-defined date range or a specific customer, by setting up a user-defined filter.

If you want to use an existing filter, the filter can be applied by selecting the Filter from the drop-down list.

If you want to create a new filter, first create the filter parameters in the section **Search**. You can filter the list by customer, customer group, date range, payment method, invoice type or the user who created the posting or invoice. Note that you can leave one of the date fields empty. If you leave the **From** field empty, the date interval indicates less than or equal.

The screenshot shows a 'Setup filters' dialog box. At the top, there are buttons for 'New', 'Save', 'Delete', and 'Close'. The dialog is split into two main areas. On the left, under the heading 'Filters', there are two radio buttons: 'Posting filter' (which is selected) and 'Invoice and credit filter'. Below these is a list box containing 'Filter 1' and 'Filter 2', with up and down arrow buttons to its right. On the right side, under the heading 'Filter info', there is a 'Name' label and an empty text input field.

For invoices, two more criteria are available. If you wish to see invoices as well as credit notes select both in the **View** drop-down list. Otherwise, select either invoice or credit note. You can also specify invoice number.

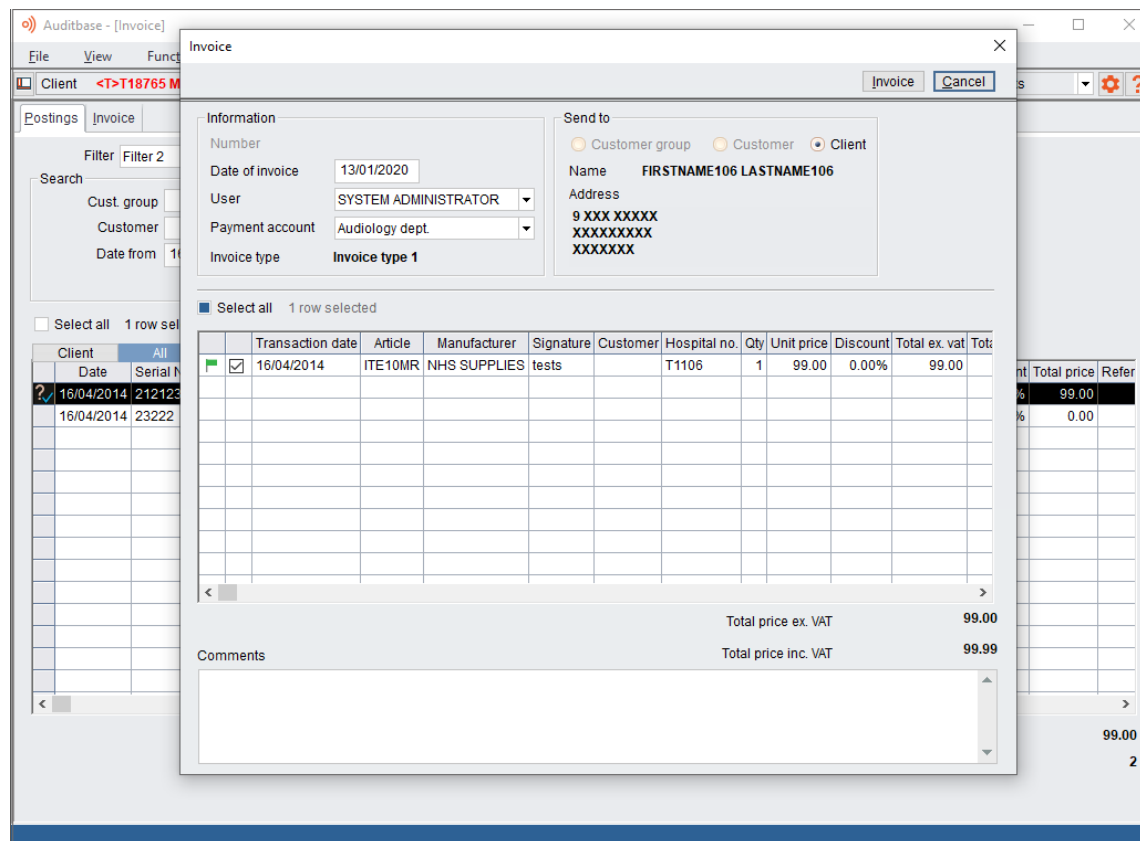
Next, save the defined filter by pressing **Save**. In the opened **Setup filters** dialog, select a filter type, **Posting** or **Invoice** and enter a name for the new filter. If you want to overwrite an existing filter, select its name in the list and press **Save**.

From now on the new filter can be applied by selecting in the **Filter** drop-down list.

Alternatively, you can start by creating a name for the new filter in the **Filter setup** dialog. Then, specify parameters and save the filter.

## 16.3 Creating an invoice

An invoice is created from postings. A posting is a row describing a number of articles of the same type which have been issued to a client.



- Select **Modules** -> **Invoice** or press **Shift+Ctrl+I**.
- From the stock module, you can access the invoice module directly by clicking the invoice button.
- Select the **Postings** tab.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Postings for the selected **Client** are displayed or select postings for **All**.
- Choose the posting(s) and click on the **Invoice** button. You can only select one type of posting.
- Specify the payment accounts and submit the invoice by clicking **Invoice**.
- The invoice module creates and saves the invoice.
- The postings are transferred to one single line with the same invoice number and are no longer listed in the postings tab.
- The Invoice module returns and displays the remaining postings.
- If the invoice addressee is a customer or group, the system requires customer code.
- Depending on the setting made by the System Administrator, if the customer has no code specified, the system either show a warning or prohibits the invoice saving.

## 16.4 Payment accounts

- Select **Functions** -> **Payment accounts** to view accounts listed.

Payment account

New Save Delete Close

Accounts:

Audiology dept.  
General treatment

Information

Name:

Number:

Description:

Default

- Press **New** to initiate the creation of a new account.
- Enter **Name**, **Number** and **Description** of a new payment account.
- Set the default payment account by checking the default box.
- Press **Save** to save the account.
- To edit an account, select the account in the list and modify the details. Then press **Save**.
- Press **Delete** to delete an account selected in list.

*Note that the system does not allow for deleting an account referenced by an invoice.*

## 16.5 Customer groups

Creating a Customer or Customer group has now been moved to the Administration portion of Auditbase and is now an extended right for users.

Information on how this is done can be found in the Administration User Guide.

## 16.6 Creating a credit note

A credit note is created from the invoice view in the invoice module.

- Go to **Navigation** -> **Invoice** or press **Shift+Ctrl+I**.
- Select the **Invoice** tab.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Invoices for the selected client are displayed. You can also select invoices for **All**.
- Double-click on the invoice. If the invoice contains several postings, select the invoice(s) you wish to credit and click on **Credit note**.

OR:

- Select the invoice and click **Credit note** from the invoice tab.
- Click **Yes** on the appeared warning.
- Click **Print** to print the credit note.

*Only users who have been granted rights to create notes can create the credit notes.*

*You cannot cancel a credit note when you have pressed the credit note button.*

The screenshot displays the 'Invoice' view in the Auditbase software. At the top, there are tabs for 'Postings' and 'Invoice'. Below the tabs, there is a search area with fields for 'Filter', 'Cust. group', 'Customer', 'Invoice type', 'User', 'Date from', 'to', 'View', and 'No.'. There are 'Save' and 'Refresh' buttons. Below the search area, there are buttons for 'Credit note', 'Open', and 'Cancel invoice'. A table is visible with columns: Client, Date, Number, Invoice type, Receiver type, Rec, User, C/L, Hospital no., NHS no. The table shows two rows of data for the date 27/03/2015. A warning dialog box is overlaid on the table, containing a warning icon and the text: 'Remember to make any relevant stock transactions, for postings included in this credit note.' Below the dialog box is an 'OK' button.

Client	Date	Number	Invoice type	Receiver type	Rec	User	C/L	Hospital no.	NHS no.
	27/03/2015	15	OTHER	Client	SMITH	ame tests???	L	T18765	88888888
	27/03/2015	16	OTHER	Client	SMITH	ame tests???	L	T18765	88888888

## 16.7 Editing postings

Sometimes you need to modify a posting before invoicing, e.g. change customer or price.

- Go to **Navigation** -> **Invoice** or press **Shift+Ctrl+I**.
- Select the **Postings** tab.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Postings for the selected client are displayed or select postings for **All**.
- Highlight the posting and click **Edit** button.

In the opened **Edit posting** dialog, the following data can be modified:

- **Invoice type** may be selected in the drop-down list.
- Price.
- Invoice payer.
- The “**to customer**” option must be selected along with **Customer** in the drop-down list if the payer is a customer.
- An **Invoice without client reference** can be made by selecting the corresponding check box.
- The “**to client**” option must be selected if the payer is a client.
- Click **Save** or **Cancel** to close without saving.

Dialog box: Edit posting: ADULT, 1

Buttons: Receipts, Label, Print, Save, Cancel

Client: MR JOHN SMITH

Date: 13/01/2020

Referral: ...

Price: £0.00

Invoice type: Invoice type 2

Invoice:

- to customer
- to client

Annual card number: [ ]

Annual card date due: [ ]

Preferred payment method: Card payment

Receipt ID: [ ]

Card request status: [ ]

Transaction submission status: [ ]

Transaction ID: [ ]

- If **Visit charge features** are enabled in the Administration tool there will be a section in the bottom of the dialog referring to visit charges. Here you can read or enter **Annual card number**, **Annual card date due**, **Preferred Payment method**, **Receipt ID**, **Card request status**, **Transaction submission status** and **Transaction ID** which are options that refer to managing visit charges, primarily used in Sweden.

In this case you will also see a **Receipts** key in the top part of the dialog. **Receipts** allows the user to select and print one or more of the following documents: Anonymous number, Roadmap or route directions from present location to selected waiting room, and Payment receipt.

## 16.8 Deleting postings

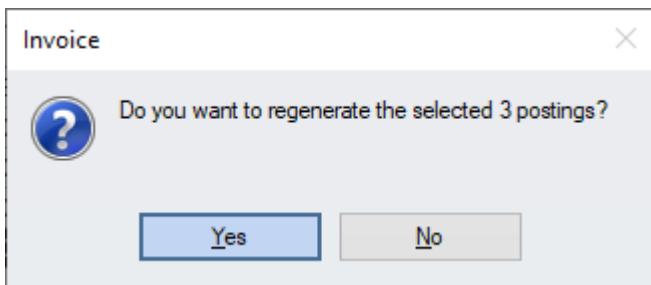
- Go to **Navigation** -> **Invoice** or press **Shift+Ctrl+I**.
- Select the **Postings** tab.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Postings for the selected client are displayed, or select postings for **All**.
- Select one or more postings and click on the **Delete** button.

*User rights to perform this action are set up by the System Administrator.*

## 16.9 Regenerating postings

Postings can only be regenerated if they have been created from services, not from stock articles. This is set by the System Administrator.

- Go to **Navigation -> Invoice** or press **Shift+Ctrl+I**.
- Select the **Postings** tab.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Postings for the selected client are displayed, or select postings for **All**.
- Select one or more postings by clicking on the far-left hand box and click on the **Regenerate** button. An information box will appear asking for permission to continue.



- The postings will then be copied but one year will be added to the date of the postings.

Postings Invoice

Filter Filter 1

Search

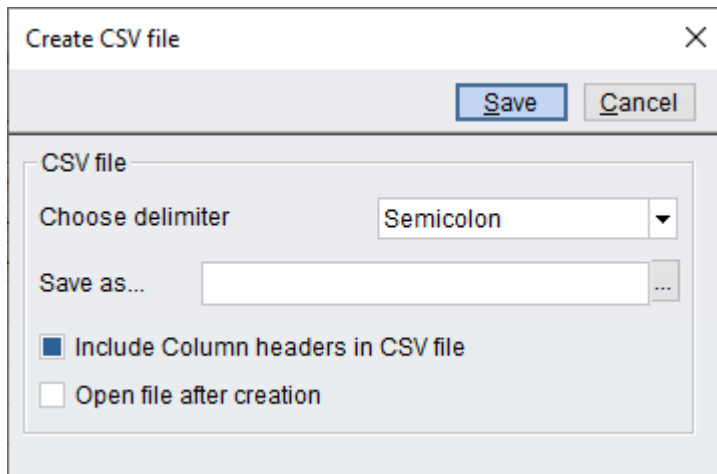
Cust. group [dropdown] Invoice type [dropdown]  
 Customer [dropdown] User [dropdown]  
 Date from [ ] to [ ] Show postings Not invoiced [dropdown]  
 Payment method [dropdown] Save Refresh

Select all 1 row selected Invoice Delete Copy Regenerate Edit

Client		All							
Date	Serial No	Group	Manufacturer	Article	Side	Hospital no.	NHS no.	Invoice type	Cus ^
10/01/2022		PROCEDURES (Service)	ADULT	DAV		T18765	88888888	Invoice type 1	
10/01/2022		PROCEDURES (Service)	ADULT	3		T18765	88888888	Invoice type 2	
10/01/2022		PROCEDURES (Service)	ADULT	3		T18765	88888888	Invoice type 2	
10/01/2021		PROCEDURES (Service)	ADULT	TYMP		T18765	88888888	Invoice type 1	
10/01/2021		PROCEDURES (Service)	ADULT	2		T18765	88888888	Invoice type 2	
10/01/2021		PROCEDURES (Service)	ADULT	2		T18765	88888888	Invoice type 2	

## 16.10 Export invoices to CSV file

A list of invoices can be exported to a CSV file by selecting **Functions -> Export to CSV file** from the **Invoice** tab.



- In the opened dialog, select a delimiter to use from the drop-down list. Semicolon is the default setting.
- Choose a file name by pressing the ‘...’ button near the **Save as** field or enter a file name manually.
- Check **Include column headers in CSV file** if the data should be created with headers.
- Check **Open file after creation** if you want to view or edit the file after creation.
- **Save** performs the export.

## 16.11 Cancelling an invoice

- Go to **Navigation** -> **Invoice** or press **Shift+Ctrl+I**.
- Select the **Invoice** tab.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Invoices for the selected client are displayed, or select invoices for **All**.
- Select the invoice and click on the **Cancel invoice** button.
- The system asks the user to confirm the invoice cancellation.
- Once an invoice has been cancelled, an Automatic Journal Event can be created if this has been set up by your System Administrator.

The screenshot shows the Auditbase application window titled 'Auditbase - [Invoice]'. The client is set to '<T>T18765 MR JOHN SMITH'. The 'Invoice' tab is active. A search filter is applied. A confirmation dialog box is open, asking 'Are you sure you want to cancel the selected invoice?' with 'Yes' and 'No' buttons. The background table shows the following data:

Date	Number	Invoice type	Receiver type	Rec	User	CIL	Hospital no.	NHS no.
13/01/2020	73	OTHER	Client	SMITH	SYSTEM ADMINISTRATOR	L	T18765	88888888
27/03/2015	15	OTHER	Client	SMITH	ame tests???	L	T18765	88888888
27/03/2015	16	OTHER	Client	SMITH	ame tests???	L	T18765	88888888

Summary statistics at the bottom right:

- Total price ex. VAT: 0.00
- Total price inc. VAT: 0.00
- Invoice count: 3

- To view cancelled invoices, select **View** -> **Show cancelled invoices**.

*Note: Only users who have been granted rights to cancel invoices can perform the cancel action.*

*It is only possible to cancel one invoice at a time.*

# 17 Repair

The repair module keeps track of on-going and closed repair tasks in a hearing clinic. The main screen in the repair module shows a list of on-going and closed repair tasks.

When the module is opened, the number of displayed tasks is limited by the system administrator. Click on the **More** button to show all tasks. The actual task is described in a repair task.

The repair task contains a description of the task to be conducted and elements and parts (articles) used to fulfil the task. The repair task will automatically calculate the repair price and update stock, based on elements and parts used. Each repair task is linked to a client or a stock item. The repair task is identified by a unique number, and holds information about how it is handled in the clinic work process.

The repair task is divided into a description of the work to be done (the **Order** tab) and a list of actual parts and services used to do the job (the **Workflow** tab).

Order No.	Serial No.	Created	Completed	Client name	Postcode	Order type	Status	Assigned to	Additional not
12	414697	08/10/2015		MRSå BANG1å BENG123å	ABC 1234	Sample order type	Assigned	USER NAME44.	
15	2221	28/10/2015		MRS FIRSTNAME106 LASTNAME106	PC:4347	Test order 2	Assigned	USER NAME32	
16	1121	28/10/2015		MRS FIRSTNAME106 LASTNAME106	PC:4347	Test order	Invoicing	USER NAME32	
17		22/05/2018		MISS FIRSTNAME23089 LASTNAME23089	PC:3192	Sample order type	Registered		
18		07/06/2018		Dr. Test 5 Test 5	111	Sample order type	Registered		
19		07/06/2018		MISS FIRSTNAME23089 LASTNAME23089	PC:3192	Test order 2	Registered		
20		07/06/2018		MISS FIRSTNAME23089 LASTNAME23089	PC:3192	Sample order type	Registered		
21		07/06/2018		Dr. Test 5 Test 5	111	Sample order type	Registered		
22		07/06/2018		Dr. Test 5 Test 5	111	Sample order type	Registered		
23		07/06/2018		Dr. Test 5 Test 5	111	Sample order type	Registered		
24		07/06/2018		Dr. Test 5 Test 5	111	Sample order type	Registered		
25		11/06/2018		MRSå BANG1å BENG123å	ABC 1234	Sample order type	Registered		
26		02/07/2018		MISS FIRSTNAME23089 LASTNAME23089	PC:3192	Test order 2	Registered		
27		04/07/2018		MRS FIRSTNAME106 LASTNAME106	PC:4347	Test order 2	Registered		
28		04/07/2018		MRS FIRSTNAME106 LASTNAME106	PC:4347	Sample order type	Registered		
29		22/11/2019		Professor 20-111FIRSTNAME32991 15-LASTNAME32991	PC:2861	Test order 2	Registered		
30		22/11/2019		Professor 20-111FIRSTNAME32991 15-LASTNAME32991	PC:2861	Sample order type	Registered		

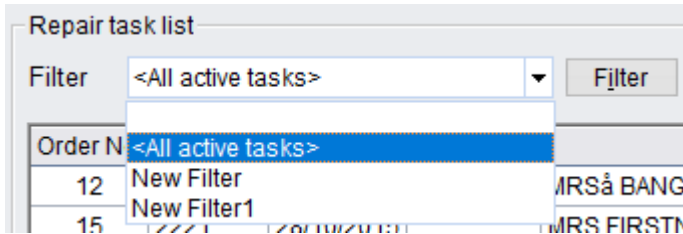
The Repair Task list can be printed out.

- Click **Print** or select **File -> Print list**.

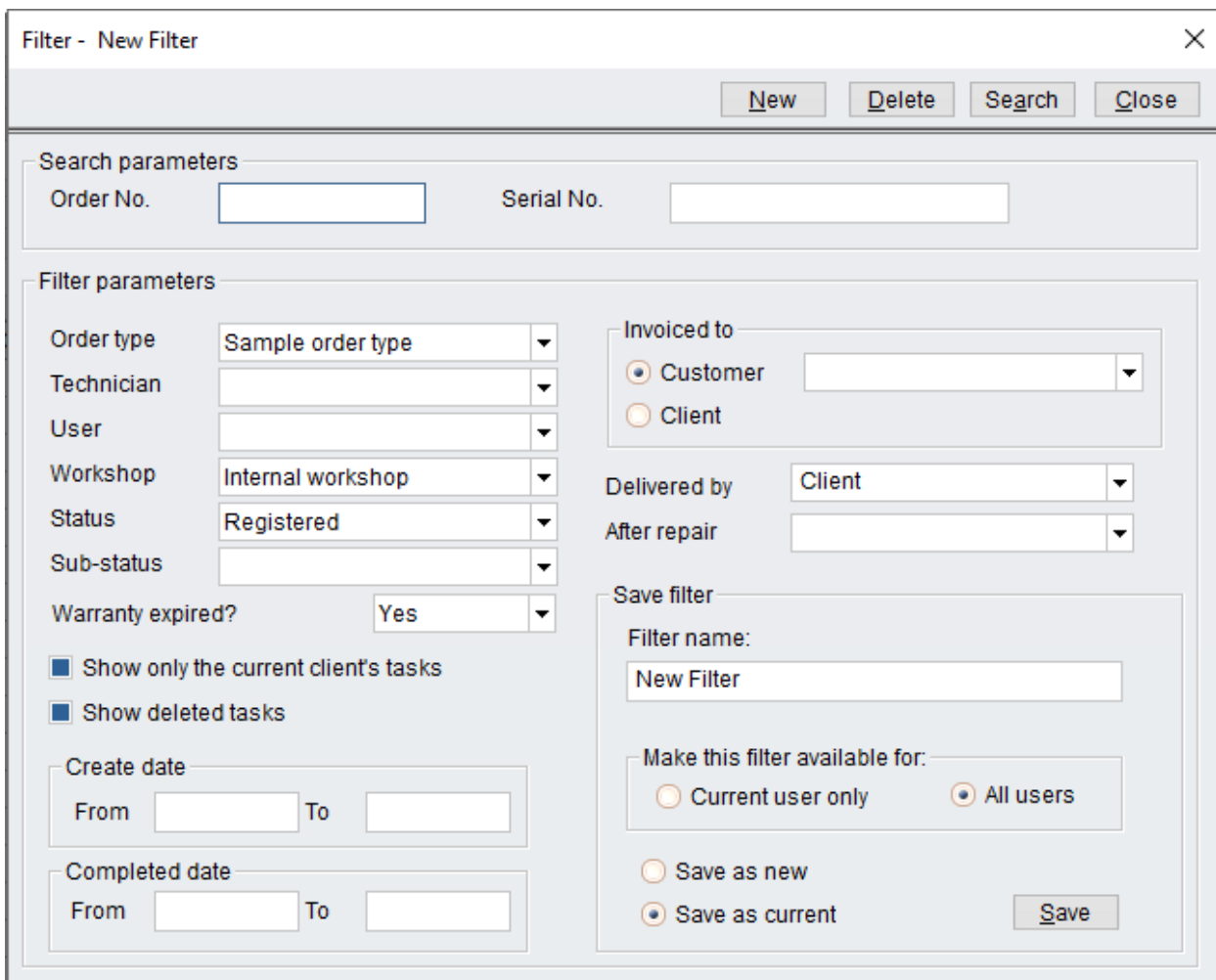
## 17.1 Repair task list filter

You can apply a filter to the list of repair orders.

- To modify criteria of an existing filter, select the filter from the **Filter** drop-down list and click **Filter**.



- If you need a new filter, select **Functions -> Search**, or with "<All active tasks>" selected in the **Filter** drop-down list, click **Filter**.



- Enter criteria for a new filter. You can combine the filter criteria in many different ways, using repair task status and label, date, workshop used, warranty, etc.

- Enter a filter name and decide whether this filter should be available for all users or only for the current user.
- Click **Save**.

The filter is now saved and available from the drop-down list in the Repair task list on the main screen in the repair module.

You can then edit the user-defined repair list filter.

- Select a filter to be edited in the **Filter** drop-down list, and click on the **Filter** button or select **Functions -> Search**.
- Modify the criteria you wish to use for this specific filter.
- Modify the filter name if required.
- Select the **Save as current** option.
- Click **Save**.

## 17.2 Repair order

The repair module is designed to handle different types of orders. The repair orders are defined by the system administrator. Each order has three subcategories. Two repair order types could be Repair and Service issue.

### **Repair**

The order type Repair is used for physical repairs of hearing instruments and other serial number controlled items. This repair takes place in the hearing clinic or the item is sent for repair to an external workshop.

### **Service issue**

The order type Service issue is used for service tasks and repairs of items without a serial number. A Service issue could be a repair or installation of hearing accessories in the home of the hearing impaired.

### 17.3 Creating a new repair task

A new repair task is created from the main screen in the repair module. Either the repair task is created for the selected client or the repair task will be created based on a hearing instrument serial number.

- Go to **Navigation** -> **Repair list** or press **Shift+Ctrl+R**.
- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Click on **New** or select **Functions** -> **New repair task** -> **Create for current client**.

OR:

- **Create new repair task by serial number.** Enter the serial number of the hearing instrument and click on **New** or select **Functions** -> **New repair task** -> **Create by article s/n**. To create a new repair task by serial number; the article must be on stock.
- Select order type from the drop-down list and select details in **Breakages description**. Group is linked to **Type** in **Order information** (pre-defined by the administrator), whereas **Details** and **Second details** are articles in stock.

*Once you have selected Type, you cannot undo or change the record.*

The Order types are defined by your System Administrator. Additionally, some types require selection of a device to be repaired. Each order type has three sub-categories: Group, Details and Second details.

Update repair task
✕

Label Print Save Close

Order Workflow

**Information**  
 Client **Test 5 Test 5**      Hospital no. **\$432516**      Device list Repair log  
 Audiogram **01/06/2018, 5, Aided, AuditBase audiogram**      Show Deleted

**Order information**  
 Type **Sample order type**  
 Order No. **18**  
 Create date **07/06/2018**  
 Status **Invoicing**

**Invoice to**  
 Customer **SWINDON PCT**  
 Client     No client reference  
**Customer**  
 Delivered by **Client**  
 After repair **Post to client**

**Internal**  
 User **SYSTEM ADMINISTRATOR**  
 Workshop **Internal workshop**  
 Message

**Breakages description**  
**Details**       Show discontinued
 

Group	Details	Second details
BATTERIES (Quantity-Accessory)	(5)Testmanu	312
	(6)Testmanu	10
	NHS SUPPLIES	AA(MN1500)
		AAA(MN2400)

Units **1**
Repair type
Note
Add

Headline	Details	Second details	Units	Repair type	Note
BATTERIES (Quantity-Accessory)	NHS SUPPLIES	675 COCHLEAR IMPLANT	1		
BATTERIES (Quantity-Accessory)	NHS SUPPLIES	312	1		
BATTERIES (Quantity-Accessory)	NHS SUPPLIES	AA(MN1500)	1		

Delete

**Additional notes**

- The repair task identifier number is automatically generated by the repair module. You can type the number manually, e.g. a number that reflects the year and the month.
- Select who to send the **Invoice to**. The clients default customer is defined in the client module. The customer can be a person or an organisation pre-defined by the administrator.
- Enter **Customer** and **Internal data** or select from the drop-down lists.
- Enter the appropriate data or select from the drop-down list **Delivered by**.
- Enter the appropriate data or select from the drop-down list **After repair**. Note that the content of the **After repair** list is defined by the system administrator.
- If you wish, select the **Workshop** to perform the repair and write a message to that particular workshop, e.g. internal workshop, cleaning. The workshops are predefined by your System Administrator, who can also configure the order they appear in the drop-down menu and a default workshop.
- Click the **Device list** button. Select the device that needs to be repaired. The **Device list** shows all devices restricted to a specific client divided into serial number controlled articles, amount controlled articles and ear moulds.
- If a hearing instrument is not listed in the device list, click the **Add external article** button, select the device and **Save**. You typically need to add a hearing instrument to the device list if a client has been provided with the instrument from another hospital.
- When accessing the device list outside the repair module, the list will also contain a list of the clients pending and closed work orders.
- By default, only not discontinued articles will be shown. To also show discontinued articles tick the **Show discontinued** checkbox.
- **Save** the repair order.
- If the warranty has expired, the warranty date will turn red.
- You can now print the repair task by clicking the **Print** button.
- **Close** the repair order.

*NOTE: Creating a repair task creates a clinical action. If you attach it to an appropriate appointment. it will be seen in the **Clinical actions** tab of the **Referral** module.*

## 17.4 Finding a repair task

You can find a repair task either by entering the serial no. of a hearing instrument or by entering the task no. of the repair order.

### 17.4.1 Find by article

- Go to **Navigation** -> **Repair** list or press **Shift+Ctrl+R**.
- Enter Serial No. in the Quick select repair task field.
- Click on **Find** or select **Functions** -> **Find repair task** -> **Find by article s/n**.

### 17.4.2 Find by Repair task number

- Go to **Navigation** -> **Repair list** or press **Shift+Ctrl+R**.
- Enter Repair task no. in the Quick select repair task field.
- Click on **Find** or select **Functions** -> **Find repair task** -> **Find by repair task number**.

## 17.5 Repair task status

The status of the repair task is either **Registered**, **Assigned**, **Invoicing**, or **Completed**.

**Registered** - When an order is created and saved, it will automatically be set to the status Registered. You can change the status manually to **Assigned** or the repair task can stay as **Registered** until **Completed**.

**Assigned** - If the repair cannot be performed now, you can set the status manually to Assigned. Use a repair task status label to specify why the task is not completed, for instance waiting for spare parts or external repair. The Assigned status is used together with a status label to detail the repair process.

**Assigned** and all further statuses require a technician to be specified for order.

**Invoicing** - Set task status to Invoicing when the repair of a device is completed, but the task cannot be closed yet because third parties have not yet issued invoices.

**Completed** - When the repair task is completed, set the status to Completed manually. An invoice will be issued and stock will be updated. If the repair price is set to 0, the system will ask if you wish to issue an invoice

*Note: The system administrator can configure the system to automatically set the Completed status for a task right after creation. This may be useful for tasks requiring no action.*

### Repair task status label

The Repair task sub-status provides additional details for the repair task status. Each repair task status can have different user-defined additional sub-statuses.

An assigned task could for instance have the sub-status **waiting for spare parts**. The repair task sub-statuses are predefined by the system administrator.



- Click on the **Articles shortcut** button to select from a list of the 10 most often used components. The 10 shortcuts are pre-defined by the administrator.
- Open up the article's information by right clicking on the article under **Details**.
- Specify **Repair type** (pre-defined by system administrator) and number of units.
- Adding a **Repair type** can be made mandatory by your System Administrator.
- Click on **Add**.
- Once the article has been added, you can also open up the article's information by right clicking on the article in the bottom table.
- Complete the repair task by changing the **Status** to **Completed** and click **Save**.  
A dialog box stating the price is shown. You now have the possibility to change the price of the invoice. If the total price of the invoice is zero, you will be prompted to accept or reject the invoice.
- Once the repair task has been saved, stock is immediately updated.
- You can now **Print** the repair task.
- **Close** the repair task.
- When a repair task is completed an invoice will be generated based on the articles used to perform the repair.
- The repair module generates postings to the invoice module.

### Workflow article

Workflow articles are items used during a repair process. The article is either a part of a hearing instrument or a device to be repaired/changed, such as a microphone or a job to be done, such as cleaning up and final assembling of the device. Based on the workflow article used in the repair process, stock will be updated and a repair price will be calculated automatically.

By default, only not discontinued articles will be shown. To also show discontinued articles, tick the **Show discontinued** checkbox.

### Repair type

The repair type details how the Workflow article will be used. This could be a used spare part (article) to be exchanged or cleaned. The repair types are predefined by the administrator, for instance exchange, cleaning or used part.

Each repair type can be marked under stock control, i.e. under full stock control or amount controlled, see Repair task status. If a repair type with stock control is selected for a Workflow article, the stock is updated (reduced) with the parts used for the repair.

The repair type factor is pre-defined by the administrator e.g. a cleaning could be defined as 30% of the full price.

## 18 Questionnaires

*Click the button below to access our training materials.*

eLearning

A number of questionnaires are available from Auditbase. They are all accessible from anywhere in Auditbase System via **Navigation -> Questionnaires**. When working with questionnaires, a client should be selected.

When the required information has been entered, you can save the questionnaire with the client's record and view it later.

## 18.1 HI satisfaction questionnaire

The **HI satisfaction questionnaire** window is called via **Navigation -> HI satisfaction questionnaire**. The window handles and processes HI satisfaction questionnaires automatically generated by the system.

The window consists of two parts: one for searching for a questionnaire, and one for editing the retrieved and selected questionnaire.

### 18.1.1 Search

The following search criteria are available:

**Label.** You can search for a specific questionnaire by entering its label number.

**Client.** You can search for all questionnaires for a specific client by entering the Client number.

**For selected client.** You can mark this check box to copy the number of the current global client into the Client number.

You can also perform a search without specifying any criteria, but the system will issue a warning that the search result can be large.

- Press **Find** to search using the specified criteria. Questionnaires meeting the criteria will be filled into the **Found** drop-down list.
- Once questionnaires have been retrieved, you can select any of the questionnaires in the **Found** drop-down list.
- The system shows details of the selected questionnaire in the **HI satisfaction questionnaire** area, and changes a global client to one the selected questionnaire belongs to.

### 18.1.2 Edit

The following data can be reviewed and/or changed:

- Client name, personal number, questionnaire label number and creation date are shown in read-only mode.
- **Questionnaire sent** check box and **Date**: Reflects whether the questionnaire is sent to a client. You cannot check this box manually; you can un-check it if you want to resend the questionnaire.
- **Questionnaire received** check box and **Date**: This is used to register a client's reply to a questionnaire.
- **Questionnaire cancelled** check box and **Date**: Used to register if a questionnaire has been cancelled.
- Press **Save** to save the changes made to the questionnaire.
- **Send** initiates the window for storing unsent questionnaires in a file. See [Send questionnaire](#) for details.

### Send questionnaire



- Click **Send** from **HI satisfaction questionnaire** to open this window. This window produces a list of unsent and un-cancelled questionnaires to a file according to parameters specified in the window.
- In **Send questionnaire registered not later ... days ago** specify the minimum age of questionnaire to be included into a file. **Age** is specified in days. The default value for this parameter is defined by the system administrator. When creating the list, the system calculates the questionnaire age from the creation date.
- In **Limited or unlimited number of questionnaires per file** specify whether the file should include an unlimited number of questionnaires, or limit the amount to a specified number.
- In **File name** enter the name of the file to be created.
- Click **Send** to start the scanning of the database for questionnaires meeting the entered age criteria and creation of the file.
- For each questionnaire included in the file, the system sets a send date. Note that only one questionnaire per client is included, and if a questionnaire for a client is included in the file, the system cancels all other questionnaires for that client.

## 18.2 Medical History Questionnaire

The Medical History questionnaire window is called via **Navigation -> Medical History questionnaire**.

- For details, refer to the Section below ([19. Medical History](#)).

## 18.3 Completing a Glasgow Hearing Aid Benefit Profile

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Click **Navigation -> Questionnaires**, and then click **Glasgow Hearing Aid Benefit Profile**.
- Fill in **First part date**. To enter the current date, double-click.
- Fill in **First part user**. To enter the current user, double-click.
- Special buttons are available for attaching the questionnaire parts to or detaching them from appointments. The buttons have a picture which reflects the state of the questionnaire part: either attached () or not attached (). In addition, the buttons have a tooltip that displays detailed information about the questionnaire linking.
- Click **Before Fitting**.
- If you want the client to consider additional situations, click **Yes**.
- Select answers to the questions.
- When the client considers his own situations, type these in and click **Finish** to ask about these situations.
- Click **OK** when the questionnaire window is complete.
- Click Show stats.
- To view the results, click **OK** and view **Raw scores** and **Percentiles** as required.

Glasgow Hearing Aid Questionnaire - GHABP ✕

Questionnaires

First part date  
 First part user

Second part date  
 Second part user



Situation	Exists	Q1	Q2	Q3	Q4	Q5	Q6
Listening to the television with other family or friends when the volume is adjusted to suit other people	<input checked="" type="checkbox"/>						
Having a conversation with one other person when there is no background noise	<input checked="" type="checkbox"/>						
Carrying on a conversation in a busy street or shop	<input checked="" type="checkbox"/>						
Having a conversation with several people in a group	<input checked="" type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						

Does this situation happen in your life?

- The Glasgow Hearing Aid Questionnaire can also be used offline.


## 18.4 Dizziness Handicap Inventory

The Dizziness Handicap Inventory (DHI) can be completed and saved for a client. To access the DHI, select a client and then select **Navigation** -> **Questionnaires** -> **Dizziness Handicap Inventory**.

- A **New** DHI can be created.
- **History** will show all previous DHI for the selected client.
- The date the DHI was completed is shown in the Date field.
- Special buttons are available for attaching the questionnaire parts to or detaching them from appointments. The buttons have a picture which reflects the state of the questionnaire part: either attached () or not attached (). In addition, the buttons have a tooltip that displays detailed information about the questionnaire linking.
- **Phase** can be selected from the drop-down list.
- As each **Answer** (Yes, No, Sometimes) is selected, the **Total score for questions** is completed automatically.
- The DHI can be saved or printed by selecting the appropriate button.
- **Delete** will remove the selected DHI from the database.
- Once changes have been made, **Close** will shut the page.

Dizziness Handicap Inventory ✕

Client: FIRSTNAME106 LASTNAME106 Print New Save Delete Close

History: [Dropdown] Date: 13/01/2020  Phase: [Dropdown]

NN	Question	Answer
P1	Does looking up worsen your balance problem?	
E2	Because of your balance do you feel frustrated?	
F3	Because of your balance problem do you restrict travel for business or recreation?	
P4	Does walking down the aisle of a supermarket increase your balance problem?	
F5	Because of your balance problem do you have difficulty getting into or out of your bed?	
F6	Does your balance problem significantly restrict your participation in social activities?	
F7	Because of your balance problem do you have difficulty reading?	
P8	Does performing activities like sports, dancing, household chores such as sweeping or putting dishes away make your balance problem worse?	
E9	Because of your balance problem are you afraid to leave home without having someone accompany you?	
E10	Because of your balance problem do you feel embarrassed in front of others?	
P11	Do quick movements of your head increase your balance problem?	
F12	Because of your balance problem, do you avoid heights?	
P13	Does turning over in bed worsen your balance problem?	
F14	Because of your balance problem is it difficult for you to do strenuous work around the house or garden?	
E15	Because of your balance problem are you afraid people might think you are drunk?	
F16	Because of your balance problem, is it difficult for you to go for a walk by yourself?	
P17	Does walking down the pavement increase your balance problem?	
E18	Because of your balance problem is it difficult to concentrate?	
F19	Because of your balance problem is it difficult for you to walk around the house in the dark?	
E20	Because of your balance problem are you afraid to stay home alone?	
E21	Because of your balance problem do you feel handicapped?	
E22	Has your balance problem placed stress on your relationships with your family or friends?	
E23	Because of your balance problem are you depressed?	
F24	Does your balance problem interfere with your job or household responsibilities?	
P25	Does bending over increase your balance problem?	

**Total score for questions**

Total score for Physical (P) questions  /28

Total score for Emotional (E) questions  /36

Total score for Functional (F) questions  /36

Total score for all questions  /100

## 18.5 Custom questionnaires

Auditbase users can create their own customized questionnaires using this feature found in Auditbase rather than the System Administration tool. No additional user rights are required to save the questionnaire for a client, but there is a required extended user right to be able to create or edit questionnaires. The questionnaire that is created can become a clinical action and can be seen on the **Client Pathway Overview**. Questionnaires that have been designed or saved for a client can be found in **Navigation -> Questionnaires -> Custom Questionnaires**. They can be moved to **Favourites** in the usual way.

### 18.5.1 Questionnaire design

Select **Navigation -> Questionnaires -> Custom questionnaires -> Questionnaires design**.

Previously designed questionnaires are shown in the drop-down menu labelled **Questionnaires**. Selecting a previously designed will allow it to be edited.

To create a new questionnaire, select **New** and give the questionnaire a **Name**. Once the questionnaire has been saved, an **ID (internal)** number will be automatically created which will be needed when designing a Crystal Report.

If the questionnaire is to be attached to forms in the Implant module, the **Available for attaching to implant forms** box should be checked.

A questionnaire can be hidden from view by checking the **Outdated** box.





A copy of a current questionnaire can be made by selecting a questionnaire and then select **Copy**. You will be asked if you want to make a copy of the selected questionnaire. Select **Yes** and the name of the questionnaire will have - **Copy** added to the end of it. This can then be edited.

Questionnaires can be saved or deleted by selecting the appropriate button. In each case you will be asked for confirmation. Deletion is only permitted if no questionnaires have been completed for clients, in that case outdating should be used.

The design of a particular questionnaire can be exported by selecting a questionnaire from the drop-down menu and then **Export**. The **Save file** window will open and you can select where to save the resultant XML file.

The design of a questionnaire can be imported from a file using the **Import** button. Once this has been selected, a **Save file** window opens where you can navigate to where the file has been stored. Select the **File name** and click **Open**. The new questionnaire will then be saved if the name of the questionnaire does not match any you have already saved.

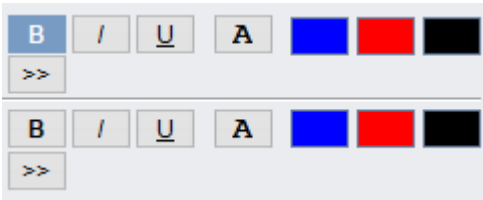
A questionnaire can be previewed at any stage by selecting the **Preview** button. This will show the questionnaire as a user will see it.

The components of the questionnaire are known as **Attributes** and can be added, removed, copied and re-ordered. To create a new attribute, select  and a **New attribute** will appear in the **Attributes** window. To remove an attribute, select  and you will be asked if you want to save the questionnaire. Select **Yes** and you will then be asked to confirm that you want to delete the selected attribute. The order that attributes appear can be changed using the up and down arrows  . Highlight an attribute then use these arrows to change the position of the attribute in the questionnaire.

The **Name** of the attribute is displayed as well as the **Type** of attribute and any **Value(s)** associated with that **Type**.

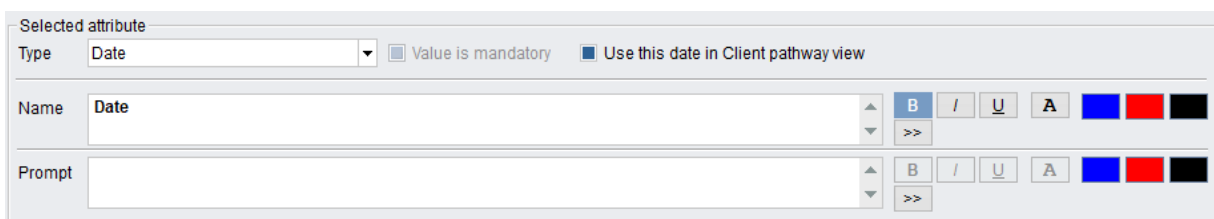
There are a number of different predefined attributes that can be added to a questionnaire. Selecting different attributes from the **Type** drop down menu will show information relevant to that attribute. The system will request you to save the design between making each attribute.

Text can be formatted using the format icons at the end of each line. Additional parameters can be shown by selecting the double arrow icon. This will display a box labelled **Height** (px) where the height of the attribute box can be changed. This is the number of pixels in height for the attribute box. The system attempts to auto-size each control to fit the content, but you can fine tune it with this feature.

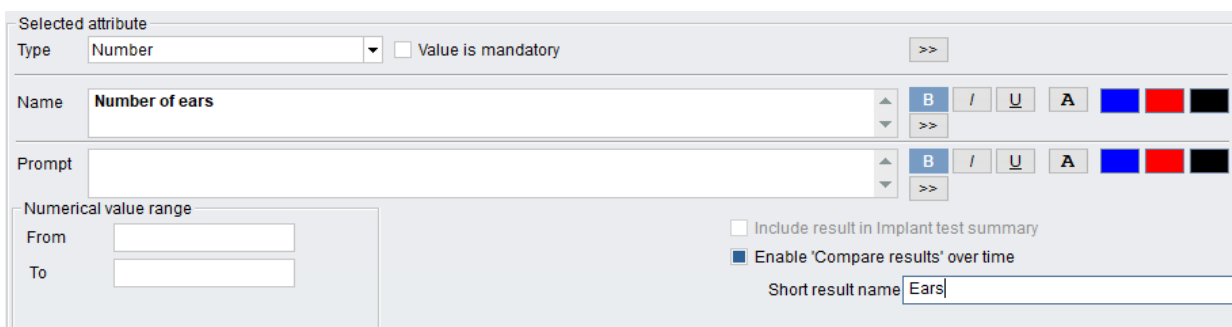


Each questionnaire must have one Date attribute which is mandatory for displaying on the **Client Pathway View**. One such field will be created automatically with each questionnaire

**Date** - This attribute will display a date and can be made mandatory by checking the box **Value is mandatory**. If you want to see the date in the **Client Pathway View**, check the box labelled Use this date in Client pathway view. A Name can be given to the date and text to Prompt the user can be added.



**Number** - This attribute will display number values and can be made mandatory by checking the box **Value is mandatory**. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the **Date** attribute, text can be added to **Prompt** the user and the text can be formatted. A **Numerical** value range can be added to restrict the numbers that can be entered. Entering the **From** value and the **To** value means that users will only be able to enter values between these two numbers. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. Once a number of questionnaires have been saved for a client, you can compare the results over a time period by selecting the box **Enable 'Compare results' over time**. This will enable a further box where you can add a **Short result name** which will appear in the compare results.



**Slider** - This attribute will display a sliding scale and can be made mandatory by checking the box **Value is mandatory**. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the Date attribute, text can be added to **Prompt** the user and the text can be formatted. A **Numerical value range** must be added to display the numbers that can be entered. Entering the **From** value and the **To** value means that users will only be able to move

the slide between these two numbers. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. Once a number of questionnaires have been saved for a client, you can compare the results over a time period by selecting the box **Enable 'Compare results' over time**. This will enable a further box where you can add a **Short result name** which will appear in the compare results.

The screenshot shows the configuration window for a 'Slider' attribute. The 'Type' is set to 'Slider' and 'Value is mandatory' is unchecked. The 'Name' field contains 'New attribute'. The 'Prompt' field is empty. The 'Numerical value range' section has 'From' set to -10 and 'To' set to 10. On the right, the 'Include result in Implant test summary' and 'Enable 'Compare results' over time' checkboxes are both checked. Below these, the 'Short result name' field contains the text 'slider'.

**Text** - This attribute will display a box where free text can be added and can be made mandatory by checking the box **Value is mandatory**. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the Date attribute, text can be added to **Prompt** the user and the text can be formatted. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. This will enable a further box where you can add a **Short result name** which will appear in the compare results.

The screenshot shows the configuration window for a 'Number' attribute. The 'Type' is set to 'Number' and 'Value is mandatory' is unchecked. The 'Name' field contains 'Number of ears'. The 'Prompt' field is empty. The 'Numerical value range' section has empty 'From' and 'To' fields. On the right, the 'Include result in Implant test summary' checkbox is checked, and the 'Enable 'Compare results' over time' checkbox is unchecked. Below these, the 'Short result name' field contains the text 'Ears'.

**Drop-down list** - This attribute will display a drop-down list of items that can be added and can be made mandatory by checking the box **Value is mandatory**. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the Date attribute, text can be added to **Prompt** the user and the text can be formatted. **Option values** are added using + sign and removed using -. Selecting + will create a **New value** which will be highlighted. This value can be edited and more added to build up the list. The position of each value can be adjusted using the up and down arrows. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. This will enable a further box where you can add a **Short result name** which will appear in the compare results.

Selected attribute

Type: Drop-down list  Value is mandatory

Name: New attribute

Prompt:

ID (internal)	Value
514	Red
515	White
516	Blue

Include result in Implant test summary

Enable 'Compare results' over time

Short result name:

**Radio buttons** - This attribute will display a series of radio buttons. This attribute cannot be made mandatory as it will default to the value at the top of the list. If a negative response is required then a list item called “Not responded” or “Not answered” can be added as the first item in the list which will then be the default. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the Date attribute, text can be added to **Prompt** the user and the text can be formatted. **Option values** are added using + sign and removed using -. Selecting + will create a **New value** which will be highlighted. This value can be edited and more added to build up the list. The position of each value can be adjusted using the up and down arrows. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. This will enable a further box where you can add a **Short result name** which will appear in the compare results.

Selected attribute

Type: Radio buttons

Name: New attribute

Prompt:

ID (internal)	Value
	Left
	Right
	Both

Include result in Implant test summary

Enable 'Compare results' over time

Short result name:

**Checkbox** - This attribute will display a check box. Checkboxes cannot be made mandatory as the desired option could be unchecked. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the Date attribute, text can be added to Prompt the user and the text can be formatted. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. This will

enable a further box where you can add a **Short result name** which will appear in the compare results.

**Multi-selection list** - This attribute will display a box from which a series of options can be selected and can be made mandatory by checking the box **Value is mandatory**. The **Name** for the new attribute will default to **New attribute**, but this can be changed. As with the Date attribute, text can be added to **Prompt** the user and the text can be formatted. Option values are added using + sign and removed using - sign. Selecting + will create a **New value** which will be highlighted. This value can be edited and more added to build up the list. The position of each value can be adjusted using the up and down arrows. If the result needs to be shown in the Implant module test summary, the **Include result in Implant test summary** box needs to be checked. This will enable a further box where you can add a **Short result name** which will appear in the compare results.

ID (internal)	Value
521	New value1
522	New value6
523	New value2
524	New value3
525	New value4
526	New value5

**Fixed comment text** - This attribute will display a box where fixed text is displayed and cannot be edited by the user. The **Name** for the new attribute will default to **New attribute**, but this can be changed and formatted as before.

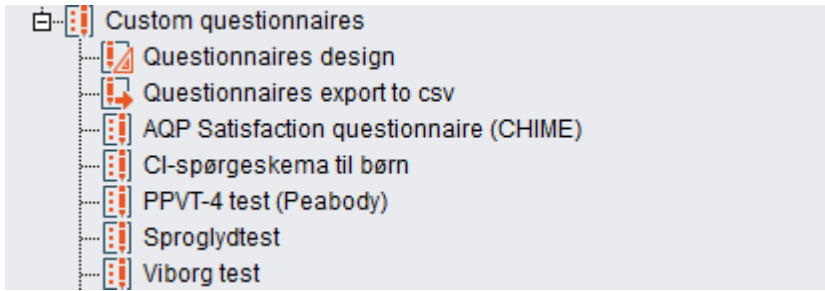
**Separator line** – Inserts a line into the questionnaire to separate sections. No formatting or editing can be performed.

Once the questionnaire has been created, it can be previewed so that you can see the attributes with their values.


The screenshot shows a 'Test quest' window with the following fields and controls:

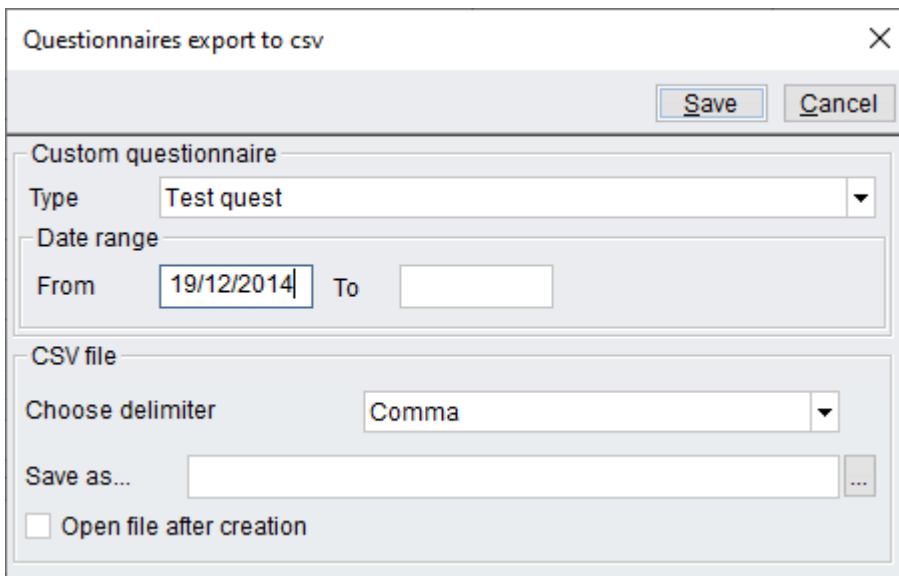
- Client:** A text input field.
- Buttons:** 'New', 'Save', 'Delete', and 'Close' buttons.
- Questionnaires:** A dropdown menu.
- Created by:** A dropdown menu showing 'SYSTEM ADMINISTRATOR'.
- Date:** A text input field with '13/01/2020'.
- Age at test:** A text input field with '0y 0m'.
- Referral stage:** A dropdown menu showing 'Not linked to appointment'.
- New attribute:** A text input field.
- New attribute 1:** A dropdown menu.
- New attribute 2:** A group of radio buttons with options: 'New value1' (selected), 'New value2', 'New value3', and 'New value4'.
- New attribute 4:** A slider control with the value '2'.
- New attribute 5:** A list of 'Available items' (1, 2, 3) with navigation arrows and an empty input field.
- Buttons:** 'Add All' and 'Remove All' buttons.
- This is fixed text:** A text input field.
- New attribute 3:** A checkbox.

A re-start of Auditbase is required to display the newly created questionnaires in the Navigation window.



### 18.5.2 Questionnaires export to csv

Once information has been entered into a questionnaire for a number of clients, the data can be extracted by selecting **Navigation -> Custom Questionnaires -> Questionnaires export to csv**. A window will open where the required Type or name of the questionnaire can be selected. A **Date range** can be selected by typing in a date in the format dd/mm/yy or by right clicking and choosing a date from the calendar. A delimiter can be chosen by selecting one of the options from the **Choose delimiter** drop down menu. Semicolon or comma are commonly used for this field. The location to save the file can be selected by typing in the path in the **Save as ...** box or by using  at the end of the field. This will open a Windows explorer window and the save location can be browsed for.



If you want to view the file that is created, check **Open file after creation** and Microsoft Excel will open and will display the data from the questionnaire.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Hosp No.	NHS No.	First name	Last name	Customer code	Customer name	Date	Number	Slider	Text box	A drop down	Shoe side		Multiselect
3		EVELYN	HARPER			13/10/2014	24	51		Red	Both shoes		1
T000002		KAROLINA	PAC	7HG2	WEST COUNTY	13/10/2014	25	61		White	Left shoe		2
T000007		TEDDY	TED			13/10/2014	67	99		White	Both shoes		1;2;3

## 19 Medical History

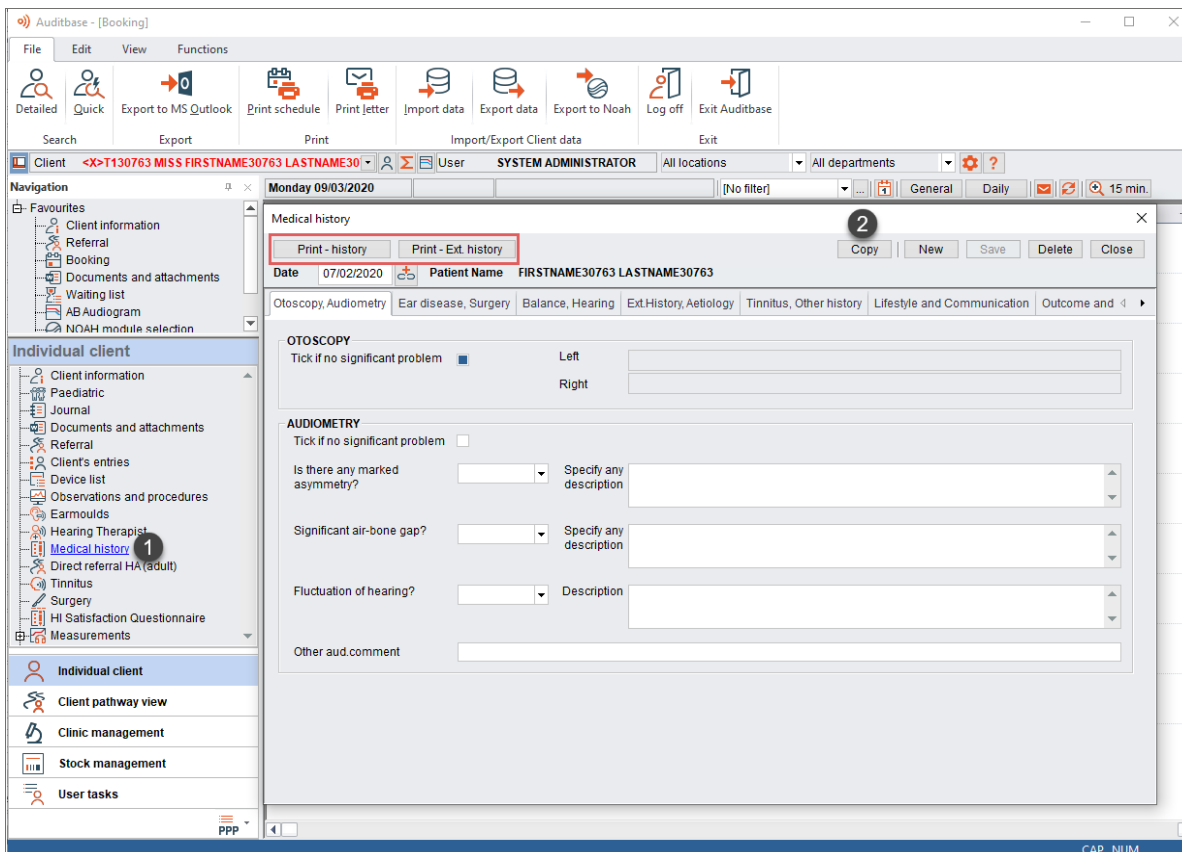
Medical History is now available as a separate module that may contain the current medical data of the client and/or the client's history of medical issues, including:

- Otoscopy, Audiometry
- Ear disease, Surgery
- Balance, Hearing
- Ext.History, Aetiology
- Tinnitus, Other history
- Lifestyle and Communication
- Outcome and Other data

The Medical History window is called from the **Navigation pane**. If it has been added to **Favourites**, it can be accessed from the *Favourites section*.

The **Copy** option allows reusing Medical History questionnaires. An existing instance of the Medical History can be saved with a new date.

The copied questionnaire becomes available when the Medical History window is called again. Users can then apply and save the required changes.



The Medical History questionnaire can also be printed by employing the corresponding controls.

## 20 Other Features

## 20.1 Client's entries

Click the button below to access our training materials.



Client's entries presents an overview of a client's appointments and waiting list entries.

Client's appointments and waiting lists ✕

Client **MR JOHN SMITH** Close

Appointments list - 42 item(s)

[History of changes](#)
[Attached actions](#)
[Delete from history](#)
[Show in appt.book](#)

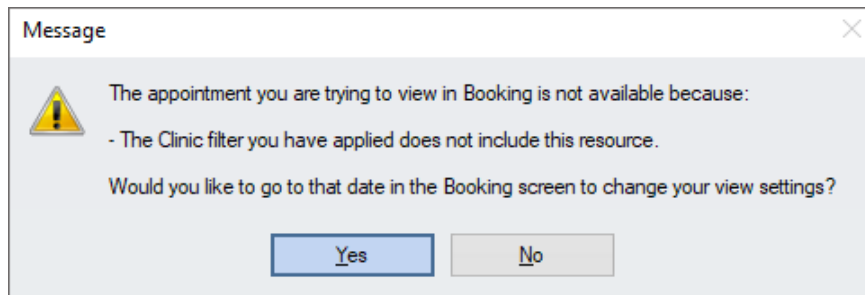
Date	Time	Loc.	Dept.	Appt.	Status	Resource	Reason	SMS1	SMS2	Declined offer	Symbol
13/01/2020	11:15			1	*	Res46					from1
13/01/2020	09:00			2	*	Charlie					2
10/01/2020	09:00			1	*	Charlie					1
09/01/2020	16:30			5	A	Stassy					GWH 1 st
09/01/2020	13:45			1	*	Stassy					PHAC new patient
09/01/2020	13:15	3	3	1	*	Res54					1
09/01/2020	13:15	3	3	1	*	Res109	++GP direct referral				PHAC new patient
09/01/2020	12:45			1	A	Travy					PHAC new patient

Waiting list entries - 7 item(s)

[Add](#)
[Edit](#)
[Show in waiting list](#)

Wait time	Date	Waiting list	Information
-186	18/06	TGW - PHA	
8	06/03	TGW - AUD	
-14	06/03	TGW - CAL	
-21	16/08	TGW - Audi	
9	16/08	TGW - CAL	
13	09/01	TGW - DOM	
20	09/01	TGW - CAL	

- Go to **Navigation-> Client's entries** or press **Shift+Ctrl+Q** or from the **Booking screen Functions -> Client's entries**.
- If in the Booking module, click **Show in appt. book** to go directly to the appointment in the appointment book.
- If a clinic view has been applied to the Booking screen and the appointment you want to look at is not available due to this filter, you will receive a message that you will need to change the clinic filter before you can view the appointment.



- Select **Yes** and you will be taken to the appropriate date. Once the clinic filter has been changed, the required appointment will be highlighted.
- **No** will return you to Client's entries
- To view any clinical actions, documents or IMPs attached to the appointment, click the **Attached actions** button. A list of attached clinical and other actions will open in a separate dialogue box where you can detach them from the appointment if needed.
- You can **Add** and **Edit** waiting list entries directly from here and jump to the Waiting list module by pressing **Show in waiting list**.
- To delete cancelled actions—they appear in grey—from the history, select them in the list and click the **Delete from history** button.
- Navigate fast between the two lists by using TAB or the keyboard shortcuts **Alt+p** for Appointments and **Alt+t** for Waiting list entries. Use the keyboard arrows to navigate inside the list.

## 20.2 Day view

Day view represents an overview of a booking day. The default setting of the Day view is today's date, but you can change the date manually if you wish to see a list of appointments for another day.

- Go to **Navigation** -> **Day view** or press **Shift+Ctrl+F3**.

The system updates the view automatically with the timeout set by the System Administrator.

You can filter the day view by:

- **View:** All appointments, client bookings, reservations or workflow (see below for more information).
- **Date**
- **Symbol:** If you only wish to view appointments with a specific symbol including outdated symbols.
- **Status:** If you only wish to view appointments with a specific appointment status e.g. DNA, Finished. The statuses can be selected by clicking on the ... icon at the end of the field and then checking the box next to the required status. Multiple statuses can be selected by checking multiple boxes. **Select** will then filter the view showing the selected appointment statuses. The selection can be cleared by clicking on **Reset**. If multiple selections are chosen, their code will display in the **Status** field. The full description of the status can be seen resting the mouse cursor on the Status field and a tool tip will display the code and description for the appointment statuses.
- **Resource:** If you only wish to view appointments associated with a specific resource.
- You can navigate between the filters by using the TAB button and select specific filters by using the keyboard arrows or the mouse wheel.
- You can choose to view appointments for all locations and departments, individual locations/departments or several specific locations/departments.
- Right-clicking on an appointment initiates the **Booking information** window where you can modify e.g. the appointment Information or enter Outcome status.
- Double-clicking on an appointment initiates the **Edit booking** window, so you can edit the booking directly from Day view.
- Clicking on the **Save window setup** button saves the currently selected view plus column order, columns width and the table sort order. The next time you run the **Day view** window, the saved table configuration will automatically be used.
- The system refreshes the **Day view** with the data currently present in the database. The interval is defined by the System Administrator.

### 20.2.1 Appointments / Reservation view

- Select the **View** drop-down list.
- Select either **All appointments**, **Client bookings**, **Workflow** or **Reservations**.

The screenshot shows the 'Auditbase - [Day view]' window. At the top, there are filters for Client (MR JOHN SMITH), User (SYSTEM ADMINISTRATOR), All locations, and All departments. Below these are buttons for 'Save window setup', 'Restore default layout', and 'Print'. The main area contains a table with columns: Time, Hospital no., NHS no., Name, Resource, Status, Reason, Information, Symbol, Referenced by, and Location. The table lists three appointments: 08:00-08:15, 09:00-10:30, and 14:00-15:15.

Time	Hospital no.	NHS no.	Name	Resource	Status	Reason	Information	Symbol	Referenced by	Locati
08:00 - 08:15	T1110		MRS FIRSTNAME110 LASTNAME110	Res46	D			1 1		All
09:00 - 10:30	T18765	88888888	MR JOHN SMITH	Charlie	*			1 1		All
14:00 - 15:15	T18765	88888888	MR JOHN SMITH	Charlie	*	++GP direct referral		PHAC new patient mould		All

- The appointments of the selected type are shown in the table.
- Select an appointment by highlighting it.
- If you right-click anywhere in the appointment, the **Booking information** opens up, where you can edit appointment status and outcome status.

The 'Booking information' dialog box displays details for an appointment. It includes fields for Client (MR JOHN SMITH), Time (09/01/2020 16:30 - 17:30), Appointment (GWH 1 ST), Location (All (no location)), and Department (All (no department)). A status dropdown menu is open, showing options: [no status], \*, Appt arranged, Q, Cancelled, A, Arrived (highlighted), and B, Being seen. Below this is a 'Stages condition' section with four stages (Stage 1 to Stage 4) each with a red square indicator. A 'Status change' section shows a history of changes: '\*, Appt arranged' on 09/01/2020 at 16:57 [17m] and 'A, Arrived' on 09/01/2020 at 17:13 by SYSTEM ADMINISTRATOR. At the bottom, there is a table for 'Client observation or procedure' with columns for Obs no., SNOMED code, ICD10 code, Date, Add, S, Text, and Comment.

- If you double click on the appointment, the **Edit booking** window opens up, so you can edit the appointment directly from Day view.

### 20.2.2 Workflow view

- Select the **View** drop-down list.
- Select **Workflow**.

This view is used for tracking client appointments flow via observation and changing of appointment stage conditions.

The table shows client appointments and their stages.

- A grey square means that the appointment does not include a specific stage.
- Red square means that the appointment includes a stage but no condition has been set yet.
- Right-click on the stage cell to set a condition for the stage.

Auditbase - [Day view]

File View Edit

Client <T>T18765 MR JOHN SMITH User SYSTEM ADMINISTRATOR All locations All departments

Save window setup Restore default layout Print

View: Workflow Date: 10/01/2020 Symbol: All Status: Resource: All

Information	Time	Symbol	Stage 1	Stage 2	Stage 3	Stage 4	Referenced by	Location	Departm	Booking cod	Waiting room
	15:47	1 1						All	All	2310	
	15:00	1 1						All	All	3208	
	17:39	PHAC new patient mould						All	All		

- Pending
- In Process
- Completed
- Clear stage condition

## 20.3 Device list

Use this module to review devices, accessories, earmoulds and repair tasks for a client.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation** -> **Device list** or press **Shift+Ctrl+D**.
- Only Serial number controlled articles are shown on the **Devices** tab. Quantity controlled articles can be shown on the **Accessories** tab, if configured so by your System Administrator.
- For **Devices** and **Accessories** the current situation or the historical situation can be shown by clicking **Present** or **History**.
- Devices are listed with stock type, the date when the device entered this stock type, the name of the device, quantity, status of left/right along with the signature of the user logged in to the system when the new status was given to the device. Left/right status is presented by symbols defined by the system administrator.
- Accessories are listed with **Created date** (the date the article was first added to the client's device list), **Latest issue date** (showing the last time one of these articles were added to the device list), Stock type and Stock Group, the Article name, status of left/right and quantity along with the signature of the user logged in to the system when the new status was given to the accessory. When this information is viewed in **Client Information**, **Devices** tab, only the **Created date** is shown NOT the **Latest issue date**. This is for performance reasons.
- Devices and accessories can be attached to or detached from an appointment by clicking **Attach** or **Detach**, respectively.
- The Device tab also shows the serial number of the device and a version number.
- Item information is shown where it has been added for a particular article.
- You can change the status of an item marked in the listing by clicking **New status** or **Alt+N**.

*NOTE: Changes in device status create clinical actions. If you have attached them to appropriate appointments, they can be seen on the **Clinical actions** tab of the **Referral** module.*

- For devices, you can view the selected device in the **Stock** module by pressing **Show in stock**, or **Alt+S**, or show information for a device by pressing **Information** or **Alt+I**. You can view the **History** of a particular Serial number controlled article by pressing the **History** button or pressing **Alt+T**.
- **Earmoulds** list shows the date of impression, date of sending to manufacturer, ready date, types of left and right mould and comments.
- **Repair list** shows which devices are being repaired. The information shown is the information from the Order tab in the Repair module. Depending on how the **Order type** has been set up by the System Administrator, breakage details can be shown over several lines.
- Double-click on a post to open the post.
- Click **Print** to get the listing on paper.

- You can print a receipt from the Device list by selecting one or more articles and pressing **Print receipt**.

The screenshot shows the 'Device list' window with the following data:

	Modified date	Stock type to	Article	L/R	User	Serial number	Item information	Version	R
<input checked="" type="checkbox"/>	10/01/2020	FITTED/EXCHANGED (Issued)	NHS SUPPLIES, BE101	-	SYSTEM ADMINISTRATOR	NBG09858			
<input checked="" type="checkbox"/>	10/01/2020	FITTED/EXCHANGED (Issued)	GNRESOUND, CS61	R	SYSTEM ADMINISTRATOR	5345345			
<input type="checkbox"/>	25/09/2015	FITTED/EXCHANGED (Issued)	NHS SUPPLIES, ITE10MR	R	full name tests???	1234432		3	
<input type="checkbox"/>	25/09/2015	RECONDITIONED (Issued)	BERNAFON, test	L	full name tests???	1234433		aa	
<input type="checkbox"/>	22/06/2015	RECONDITIONED (Issued)	A&M, SELECTRA	R	full name tests???	23223			

- An appointment associated with when an article was modified can be attached to the Device list by selecting **Attach**. This will display all the client's appointments. The appropriate appointment can be selected by highlighting it and selecting **Attach**. **Close** will shut the window without selecting. If the clinical action for issuing an article is set up by your System Administrator, an appointment on the same day as a modified article event will automatically link the event with that appointment, if the appointment start time is earlier than the current time. The appointment can be unlinked from the event by selecting the article in the list and choosing **Detach**.

The screenshot shows the 'Attach appointment to stock transaction' dialog box with the following data:

Date	Symbol	Description	Resource	Status
16/01/2020	📅	SAV ENT aud	Charlie	*
13/01/2020	📅	from1	Res46	*
13/01/2020	📅	2	Charlie	*
10/01/2020	📅	PHAC new p	Charlie	*
10/01/2020	📅	1	Charlie	*
09/01/2020	📅	PHAC new p	Stassy	*



## 20.4 Client observations and procedures

Click the button below to access our training materials.

eLearning

Use this function to add a predefined observation or procedure to a client.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Observations and procedures**.

The screenshot shows a window titled "Observations and procedures" with a close button (X) in the top right. At the top left is an "Add to client" button, and at the top right are "Save", "Delete", and "Close" buttons. Below these are radio buttons for "Current" and "All", and checkboxes for "Observations" and "Procedures".

The "Observation list" table has columns: Obs no., ICD10 code, SNOMED code, Add., and Text. It contains the following data:

Obs no.	ICD10 code	SNOMED code	Add.	Text
125	125			Presbyacosis
126	126			Otoscleros
127	127			Test observation
128	128			Test procedure

Below this is the "Client observations" table with columns: Obs no., ICD10 code, SNOMED code, Date, Add., S, Side, Text, and Comment. It contains the following data:

Obs no.	ICD10 code	SNOMED code	Date	Add.	S	Side	Text	Comment
127	127		09/01/2020				Test observation	
125	125		09/01/2020				Presbyacosis	
127	127		09/01/2020				Test observation	
125	125		01/05/2015	1	r	Right	Presbyacosis OCCUPATIONAL Right	123abcd#%\$%123abcd#%\$%123abcd#%\$%123abcd123abcd
125	125		21/04/2015	1	L	Left	Presbyacosis OCCUPATIONAL Left	2
128	128		22/02/2015	4	B	bilat	Test procedure code no 4 bilat	ahrc&aa123!@#%&*!()ahrc&aa123!@#%&*!()ahrc&aa123!@#%

- Select the **Current** or **All** location to filter the observations.
- Select **Observations** and/or **Procedures** to filter the observations.
- To add an observation or procedure to a client record, highlight the observation or procedure in the upper table and click **Add to client** or double-click. Repeat this process until all required observations/procedures are displayed in the lower table. Click **Save**.

**Be aware:** Be careful when adding observations and procedures; ensure the Client is correct. Entering an incorrect observation or procedure can cause incorrect treatment.

- To remove an observation or procedure from a client record, highlight it in the lower table and click **Delete**.
- In the lower table, you can type in a number in the **Add.** column (Additional code) and a preconfigured text created by your system administrator is added to the **Text** field.
- Enter L, R or B in the **S** column for left, right and bilateral or use the **Side** box to select it.
- To edit the **Comment** column, double-click in the lower table and the **Edit client's observations and procedures** window appears.

Edit client's observations and procedures

Date: 09/01/2020

Observation or procedure: 125, Presbyacusicis

ICD10 code: 125

Add. code:

Side:

Comments: Some comments

- Enter your comments and click **Save**.
- You can also add a comment to the observation directly in the list by clicking in the Comment's field and entering your comment.

Observations and procedures

Observation list In location and department:  Current  All  Observations  Procedures

Obs no.	ICD10 code	SNOMED code	Add.	Text
125	125			Presbyacusicis
126	126			Otoscleros
127	127			Test observation
128	128			Test procedure

Client observations

Obs no.	ICD10 code	SNOMED code	Date	Add.	S	Side	Text	Comment	Appt.	Appt.date	Appt.name
125	125		13/01/2020				Presbyacusicis	Some comments			

- Once saved, you can also attach the observation or procedure to an appointment by selecting the observation or procedure in the lower table and click **Attach appointment**.

Attach observation or procedure to appointment

Date	Symbol	Description	Resource	Status
28/12/2018	📄	MALMESBUJ Alan		*
28/12/2018	📄	MALMESBUJ Charlie		*
28/12/2018	📄	MALMESBUJ Res70		*
10/12/2018	📄	SAV ENT au Charlie		*
10/12/2018	📄	PHAC new p Alan		*
05/07/2018	1	1	Travy	*

- Choose an appointment from the list of appointments and click **Attach**.
- If you wish to detach the observation or procedure from an appointment, you simply select the observation or procedure in the lower table and click **Detach appointment**.

*If you choose to detach the observation or procedure from the appointment, it will still remain on the client's record.*

- Once an observation or procedure is attached to an appointment, it will show up on the **Booking information** dialogue box, from where an observation or procedure can also be attached, edited or deleted.

X
Booking information

Client: MRS FIRSTNAME106 LASTNAME106
Time: 28/12/2018 08:00 - 08:30
Attached actions
Close

Appointment <input checked="" type="checkbox"/>	MALMESBURY ENT AUDIO	Location	All (no location)	Letter:	
Timetable	2 2	Department	All (no department)	Verbal:	X
Made by:	YULIAMAUKHA on 28/12/2018	Attn. with		Status	
Resource(s):	ALAN				

<input checked="" type="checkbox"/> 08:00 Charlie <input checked="" type="checkbox"/> 08:00 Res70	<div style="border: 1px solid #ccc; padding: 2px;"> <span>[no status]</span>  <span>* Appt arranged</span>  <span>Q, Cancelled</span>  <span>A, Arrived</span>  <span>B, Being seen</span> </div> Stages condition: <hr/> Status change <span style="float: right;">Delete</span> *, Appt arranged 28/12/2018 14:38
--	---

Referred by	
Reason	
Outcome status	
Current outcome	Appointment not linked to referral
Linked Waiting list	

Details Hospital no.: T1106; NHS no.: 5555554444 MRS FIRSTNAME106 LASTNAME106 9 XXX XXXXX XXXXXXXXX XXXXXXXX	Information <span style="float: right;">History of changes</span>
---	---

Client observation or procedure	Add / Edit / Delete	Edit	Delete
---------------------------------	---------------------	------	--------

Obs no.	SNOMED code	ICD10 code	Date	Add.	S	Text	Comment
125		125	13/01/2020			Presbycusis	Some comments

- Back in the **Observations and procedures** window, everything from the observation or procedure will be written to the journal when you save, including full text and comments as well as appointment information if the observation or procedure was attached to an appointment.
- You will also find the observation or procedure in the Referral module with the option of editing the observation or procedure from the Referral module.
- Further, all changes are reflected in the Paediatric module on the Clinical information tab.

## 20.5 Hearing Therapist

The Hearing Therapist module contains a number of check boxes and free text fields used to store specific Hearing Therapy data for the selected client.

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Hearing Therapist**.
- Previous reports can be viewed by selecting the required date from the **Therapist Reports** drop-down list.
- When a previous report is selected, the button **Progress report** becomes active and brief comments on specific areas of Therapy can be added such as date and note to training, visits, etc., to get an overview of the client's progress.
- Comments can be added and saved with the signature of the Auditbase System user logged in at the time.
- **New** clears the details so a new report can be added.
- Click **Save**.
- **Print** the report if required.

Hearing Therapist

Progress report    New    Save    Delete    Print    Close

Therapist reports 1, 04/07/2016

Client MRS FIRSTNAME106 LASTNAME106

Progress report

Signature full name tests???

	Date	Note
Hearing instrument adj.	04/07/2016	
Functional training	04/07/2016	2
Training	04/07/2016	344
Hearing damage treatment		
Intensive course		
Education		
Home visit		

Comments

Comments

Hearing Therapist
✕

Progress report
New
Save
Delete
Print
Close

Therapist reports 1, 04/07/2016 ▼

---

Client MRS FIRSTNAME106 LASTNAME106

Date 04/07/2016      User full name tests??? ▼

Pocket   
  BTE   
  ITE   
  Canal   
 Previous hearing aid?   
  Yes   
  No

Difficulty walking   
  Sight damage   
 Manufacturer

**Serious HNS**   
 Work/phone no.

Technical aids:

Acoustic signal   
  door   
  phone

Optic signal   
  door   
  phone   
  at TV

TV/radio   
  telecoil room   
  telecoil chair   
  HP-set

Other   
  wake up call   
 other

Technical aids at work   
  Yes   
  No

Mould handling   
  Good   
  Medium   
  Bad

Previous contact with therapist   
  Yes   
  No   
  Advised

Audiologist's notes

## 20.6 Direct Referral HI (adult)

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Direct referral HA (adult)**.
- **GP** and **ENT** are selected from lists using the button at the end of the fields.
- Choose reason for ENT referral from the drop-down lists if required.
- You can right-click on the drop-down boxes to edit the list of reasons for ENT referral.
- Choose **Priority of referral** from the drop-down list.
- Click **Save**.

When this referral page is completed the Direct Referral box in the Details tab of the Client Information module is automatically checked.

This referral form is a shorter version of the **Direct Referral – Medical/audiological history – DR-Med** questionnaire covering the TTSA guidelines for Direct Referral.

Direct Referral HA (Adult)
✕

GP	DR S RATNANDAN, NORTHLANDS SURGERY, T ...
ENT	MRS ANNAN, 222 STR, HOME CITY ...
Date referral received	<input type="text"/>
Referral correct?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
<hr/>	
Date of DR clinic visit	<input type="text"/>
Clear of wax?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
ENT referral advised?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If yes, reason(s)	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
<hr/>	
Priority of referral?	<input type="text"/>
Impression(s) for hearing aid provision?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Referral for advice/counselling?	<input type="checkbox"/> Yes <input type="checkbox"/> No

## 20.7 Tinnitus

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Tinnitus**.
- Fill in the required details using the tabs to view each screen.
- The **Audiogram list** will show a list of the client's audiograms. Double-click the date of the audiogram to view it; no adjustments can be made to the audiogram.
- Click **New** to create a new form for tinnitus analysis and type in the relevant information.
- **Save** the report when finished.

The **Tinnitus Analysis** drop-down field lists any previous tinnitus reports for the selected client.

You can also delete a tinnitus report and print the reports using the buttons at the top of the page.

- Under Inventory, you can either manually enter the percentage score from a pre, post or current Tinnitus Handicap Inventory questionnaire or you can attach a score from a questionnaire by clicking the **Browse** button next to the percentage field and choosing from a list of questionnaires.

## 20.8 Run an external application

- Go to **Navigation->Run an external application.**

The external application configured by your Administrator will be launched with the parameters configured.

## 20.9 Attention list

Click the button below to access our training materials.



When opening the **Attention list** the system will check the database for issues requiring special attention. The **Attention list** consists of several lists, including - **Referrals, Journal, Unsigned journal, Unsigned summaries, Deceased alerts, Electronic submission, Interface notifications**. Each time you open the **Attention list**, the system automatically generates the list. Progress is shown at the bottom of the window. You can start to work on the top rows while others are populating. To cancel this, just select another tab. The text below the tab names describes the reason why clients are shown.

If a user has a **Location** or **Multiple locations** selected, the results will be further filtered by the client's **Location** and they will not see all records.

When location is selected globally, a corresponding message will appear informing that *"The List is filtered by Client's Location"*.

The screenshot shows the 'Attention list' window with the following elements:

- Buttons: Do not show a warning message, D-Alert selection method (PAS alert), Print, Show in Journal, Close.
- Tabs: Referrals, Journal, Unsigned journal, Unsigned summaries, Deceased alerts, Electronic submission, Unsubmitted postings, Interface notifications.
- Text: Active referrals (not Closed or Nullified) that have not been booked or put on the Waiting list - The list is filtered by clients' location
- Table with columns: Date, Number, Hospital no., NHS no., Client name, Treatment type.
- Footer: Populating: - /30, The list is filtered by clients' location (with a red arrow pointing to it), NUM

Date	Number	Hospital no.	NHS no.	Client name	Treatment type
3/7/2000	30700	T12639		MISS FIRSTNAME2639 LASTNAME2639	SWINDON EARLY SUPPOR
3/8/2000	282	T19296		MR FIRSTNAME9296 LASTNAME9296	++DIRECT REFERRAL /Audio assessment DR MILEUSNIC Z , THE KIP
4/17/2000	30701	T13758		MISS FIRSTNAME3758 LASTNAME3758	
5/19/2000	30704	T14118		FIRSTNAME4118 LASTNAME4118	
5/19/2000	30705	T14119		FIRSTNAME4119 LASTNAME4119	
5/19/2000	30706	T14109		MISS FIRSTNAME4109 LASTNAME4109	HASSAN
5/23/2000	30707	T14132		FIRSTNAME4132 LASTNAME4132	SWINDON EARLY SUPPOR
5/23/2000	30708	T14131		FIRSTNAME4131 LASTNAME4131	SWINDON EARLY SUPPOR
6/2/2000	30709	T12094		MST FIRSTNAME2094 LASTNAME2094	HASSAN
6/2/2000	30710	T14179		FIRSTNAME4179 LASTNAME4179	Health Visitor
6/14/2000	30711	T14405		MISS FIRSTNAME4405 LASTNAME4405	DR ZENGEYA
6/14/2000	30712	T14116		FIRSTNAME4116 LASTNAME4116	DR ZENGEYA
6/14/2000	30714	T14389		MISS FIRSTNAME4389 LASTNAME4389	SWINDON EARLY SUPPOR
6/14/2000	30715	T14628		MISS FIRSTNAME4628 LASTNAME4628	SWINDON EARLY SUPPOR
6/16/2000	30716	T14441		MISS FIRSTNAME4441 LASTNAME4441	DR ZENGEYA
6/16/2000	30718	T1466		MISS FIRSTNAME466 LASTNAME466	
6/16/2000	30719	T14470		MST FIRSTNAME4470 LASTNAME4470	PAEDIATRICS

If they want to see all clients, they should change to **All Locations**. There will be a message to users on the first time they do this which they can then check to prevent it showing again.

Attention list X

Do not show a warning message    D-Alert selection method: PAS alert Print    Show in Journal    Close

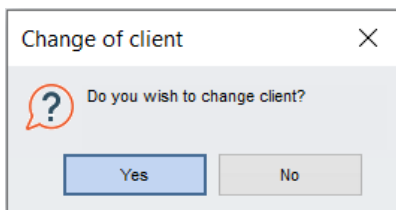
Referrals | Journal | Unsigned journal | Unsigned summaries | Deceased alerts | Electronic submission | Unsubmitted postings | Interface notifications

Active referrals (not Closed or Nullified) that have not been booked or put on the Waiting list

Date	Number	Hospital no.	NHS no.	Client name	Treatment type	
3/7/2000	30700	T12639		MISS FIRSTNAME2639 LASTNAME2639		SWINDON EARLY SUPPOR
3/8/2000	282	T19296		MR FIRSTNAME9296 LASTNAME9296	++DIRECT REFERRAL / Audio assessment	DR MILEUSNIC Z , THE KIP
4/17/2000	30701	T13758		MISS FIRSTNAME3758 LASTNAME3758		
5/19/2000	30702	T14181		MST FIRSTNAME4181 LASTNAME4181		
5/19/2000	30704	T14118		FIRSTNAME4118 LASTNAME4118		
5/19/2000	30705	T14119		FIRSTNAME4119 LASTNAME4119		
5/19/2000	30706	T14109		MISS FIRSTNAME4109 LASTNAME4109		HASSAN
5/23/2000	30707	T14132		FIRSTNAME4132 LASTNAME4132		SWINDON EARLY SUPPOR
5/23/2000	30708	T14131		FIRSTNAME4131 LASTNAME4131		SWINDON EARLY SUPPOR
6/2/2000	30709	T12094		MST FIRSTNAME2094 LASTNAME2094		HASSAN
6/2/2000	30710	T14179		FIRSTNAME4179 LASTNAME4179		Health Visitor
6/14/2000	30711	T14405		MISS FIRSTNAME4405 LASTNAME4405		DR ZENGEYA
6/14/2000	30712	T14116		FIRSTNAME4116 LASTNAME4116		DR ZENGEYA
6/14/2000	30713	T14122		MISS FIRSTNAME4122 LASTNAME4122		SWINDON EARLY SUPPOR
6/14/2000	30714	T14389		MISS FIRSTNAME4389 LASTNAME4389		SWINDON EARLY SUPPOR
6/14/2000	30715	T14628		MISS FIRSTNAME4628 LASTNAME4628		SWINDON EARLY SUPPOR
6/16/2000	30716	T14441		MISS FIRSTNAME4441 LASTNAME4441		DR ZENGEYA

Populating: - /31 NUM

If configured in Auditbase Administration (General settings > Options), the warning on changing the global client will be applied.



### Referrals

Lists all clients with a referral which has not been followed up by an appointment or put on a waiting list from the referral page. This list makes sure that no referred clients are left without attention. It is possible to see the Referral Treatment Type on the list of Referrals:

Attention list X

Do not show a warning message    D-Alert selection method: PAS alert Print    Show in Journal    Close

Referrals | Journal | Unsigned journal | Unsigned summaries | Deceased alerts | Electronic submission | Unsubmitted postings | Interface notifications

Active referrals (not Closed or Nullified) that have not been booked or put on the Waiting list

Date	Number	Hospital no.	NHS no.	Client name	Treatment type	
3/7/2000	30700	T12639		MISS FIRSTNAME2639 LASTNAME2639		SWINDON EARLY SUPPOR
3/8/2000	282	T19296		MR FIRSTNAME9296 LASTNAME9296	++DIRECT REFERRAL / Audio assessment	DR MILEUSNIC Z , THE KIP
4/17/2000	30701	T13758		MISS FIRSTNAME3758 LASTNAME3758		
5/19/2000	30702	T14181		MST FIRSTNAME4181 LASTNAME4181		
5/19/2000	30704	T14118		FIRSTNAME4118 LASTNAME4118		
5/19/2000	30705	T14119		FIRSTNAME4119 LASTNAME4119		
5/19/2000	30706	T14109		MISS FIRSTNAME4109 LASTNAME4109		HASSAN
5/23/2000	30707	T14132		FIRSTNAME4132 LASTNAME4132		SWINDON EARLY SUPPOR
5/23/2000	30708	T14131		FIRSTNAME4131 LASTNAME4131		SWINDON EARLY SUPPOR
6/2/2000	30709	T12094		MST FIRSTNAME2094 LASTNAME2094		HASSAN

## Journal

Lists all client appointments which have not been followed up by journal entries during the last month. This list makes sure that there is a journal entry for each appointment.

## Unsigned journal

Lists all clients with journal texts which have been saved unsigned. This list makes sure that no journal text is left unsigned.

To select a client, click on the row in the list. The client now becomes the global selected client. When you have taken care of the issue, the client is automatically removed from the list.

The columns in the list can be sorted by clicking on the column header.

## Unsigned summaries

Lists all clients with unsigned treatment summaries. This list makes sure that no summary is left unsigned.

- To select a client, click on the row in the list. The client now becomes the global selected client.  
When you have taken care of the summary, the client is automatically removed from the list.

The columns in the list can be sorted by clicking on the column header.

## Deceased alert

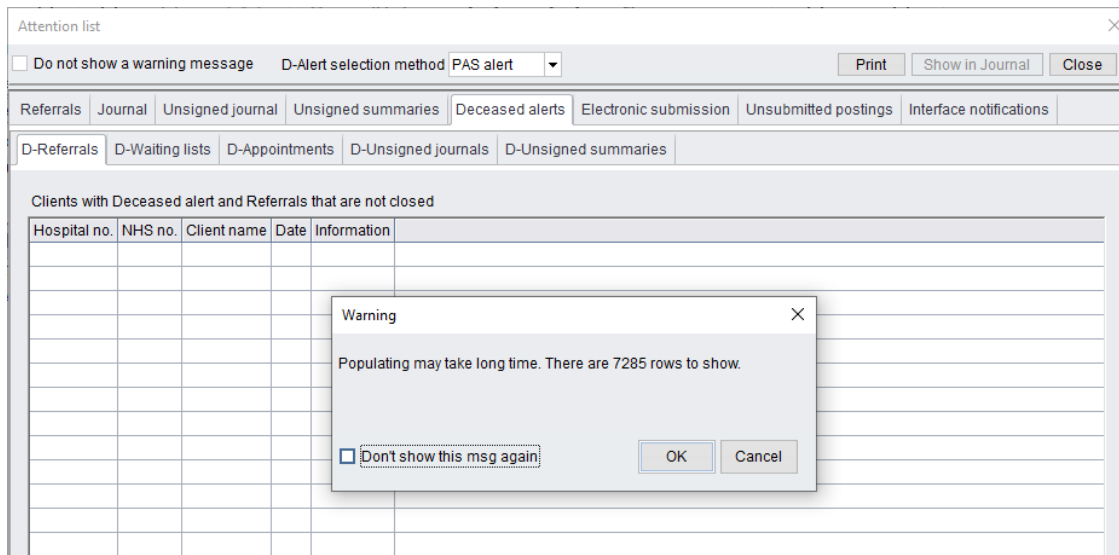
Lists uncompleted activities for clients with Deceased alert. Separate tabs show each kind of open record that a deceased client could have. The text below the tabs describes why a client is shown on that particular tab.

- To select a client, click on the row in the list. The client now becomes the global selected client.  
When you have taken care of the issue, the client is automatically removed from the list.

The columns in the list can be sorted by clicking on the column header.

Deceased alerts can be searched for in two separate places to make the results populate quicker. The user must select either **PAS alert** or **Alert** in the **D-Alert Selection method** drop down list depending how deceased alerts are normally entered.

Auditbase will retain the **D-Alert Selection method** chosen by the user for any future lists to be populated. Any subsequent change to the selection method will be retained for the user.



A warning is shown when there are a lot of deceased records. If the user does not wish to see the message each time the Deceased attention tab is selected the box **Don't show this message again** can be checked to disable the message.

Within the Deceased attention tab there are further tabs to identify clients with a Deceased alert whose Referrals are not closed, are still on a Waiting list, have Appointments booked in the future, have unsigned journal entries and have unsigned treatment summaries.

In the bottom left corner of the Attention list is an indication the current state of the search and once populated will indicate how many records are specific to the tab selected.

## Electronic submission

This is intended for reviewing all **Electronic Submission events** and for dealing with **Treatment Summary submissions**. These could be for optional interfaces of clinical documents with Hospital Electronic Patient Record Systems or of appointment details for patient arrival or Hospital appointment systems.

Depending on the option set in Administration under **Event Settings-> General settings** some of the controls may not be available. If the option is checked to not show Treatment Summary submission controls then only the **Data type** filter will be available and should be set to **All** or to one of the configured event types. In the case of event driven automatic Electronic Submission events will only be shown in the list between the action being performed on the client and the regular scanning work of the server components. Users have the ability to Show data to show a Treatment Summary, Audiogram or Document (document Properties dialog) whose submission was rejected. The **Delete** button can be used with supporter assistance in the case of serious failure but the event will not then be resent.

Treatment Summary electronic submissions will remain in the list after they are actively submitted by a user. The following filtering options are available for displaying Treatment Summary electronic submissions:

- Data type
- Detail type - shows the sub-type of the event
- Ready for submission
- Submitted
- Rejected
- Signed not submitted
- Status date. A range of dates can be added. Double clicking in the field will add today's date. The Status date is only relevant for Treatment Summaries where the record of Submitted is kept.

When an option changes, you have to press the **Refresh** button to update the list of electronic submissions.

The screenshot shows a software window titled "Attention list" with a close button (X) in the top right corner. Below the title bar is a toolbar with a checkbox "Do not show a warning message", a dropdown menu "D-Alert selection method" set to "PAS alert", and buttons for "Edit recipient", "Edit", "Delete", "Print", "Show data", and "Close".

Below the toolbar are several tabs: "Referrals", "Journal", "Unsigned journal", "Unsigned summaries", "Deceased alerts", "Electronic submission" (which is selected), "Unsubmitted postings", and "Interface notifications".

The main content area is titled "List of electronically submitted documents". It contains a filter section with two dropdown menus: "Data type" (set to "Treatment summary") and "Detail type" (set to "All"). There are also checkboxes for "Ready for submission", "Rejected", "Submitted", and "Signed not submitted". A "Status date:" field with a refresh icon is also present.

Below the filter section is a table with the following columns: "Date created", "Data type", "Detail type", "Hospital no.", "NHS no.", "Client name", "Recipient", "Status", and "Stat". The table contains 17 rows of data, including entries for various dates from 2013 to 2015, with client names like "MRS FIRSTNAME35815 LASTNAME35815" and "FATHER FIRSTNAME11 LASTNAME11".

At the bottom left, it says "Populating: 53 / 23". At the bottom right, there is a "NUM" label and a progress bar.

### Unsubmitted postings

This list is shown if Visit charge features are enabled in System administration. It shows the postings which should have been submitted to the Swedish online reimbursement system eFrikort, but have not been.

The list can be filtered by creation date to e.g. only show those created this week. After editing the date range, press the Refresh button to update the list.



Merge clients ✕

Major client for merge

Hospital no.  Select

NHS no.

First name

Last name

Gender

Birthdate

<< Merge <<

Minor client to be merged with major client

Hospital no.  Select

NHS no.

First name

Last name

Gender

Birthdate

Detected merge problems

There are no conflicts detected. Clients can be merged.

Information ✕

Clients merged successfully

OK

## 20.10 Location and Department handling

**Location** and **Department** are found in the upper right part of the toolbar.

### Filter information

You can use locations to filter information in Auditbase. The **Location** and **Department** can be seen and selected in the upper right part of the toolbar.

The selected location will filter:

- Resources, symbols and appointment stages in Appointment book
- Day view in Appointment book
- Letters in Appointment book
- Document types
- Waiting lists
- Stock types in Stock
- Earmould delivery address on the printout

### Location

A location can be a physical location, such as a satellite clinic or a department. It could also be a separate functional area within the clinic, such as an ENT clinic, Paediatric services.

### Department

Departments are virtual groupings such as Adult, Paediatric or Implant which could have activity at more than one location.

### Creation of Location and Department

Locations are created in the System Administration tool.

### Default Location and Department

A user or a workstation can be assigned to a specific location i.e. this location will be selected by default when logging in.

### Resources

Resources can be associated with more than one location so that they can be seen and booked from any of their associated locations.

Locations that the user is allowed to access are shown in black on the drop-down lists; Locations that the user has restricted access to are greyed out. If a user selects a greyed-out location, it won't select, but will return the user to the last selected one. If a user has the

extended user right of overruling the client access restriction, they can move a patient from a Location they are not allowed to normally access, but that action is logged in the Security log.

## 20.11 Visit charge management

In Sweden, everyone is entitled to receive financial aid once you have surpassed a specific amount used on hospital, dentist and doctor bills for the year. This makes you eligible for an annual card on which the rest of the health care visits will be charged. As a patient, your visits are free of charge for the remainder of the year.

In Auditbase, you can register details such as the annual card number, payment method and whether or not the client is eligible for free of charge visits. In order for these functions to be enabled, your System Administrator needs to do the following settings in the System administration tool:

- Under **Invoice definitions -> Preferences**, check the box Enable visit charge features on invoice events and postings.
- Under **Event definitions -> Event settings**, make sure the event number **1921, Add services on appointment status change**, is enabled (checked) and set up correctly (choose the service associated with visit charges and check the box **Prompt for user input**).
- Under **Appointment definitions -> Appointment statuses**, make sure the appropriate status (usually Arrived) is associated with invoice event 1921 (choose the status in the list and check **Associate with invoice event 1921**).

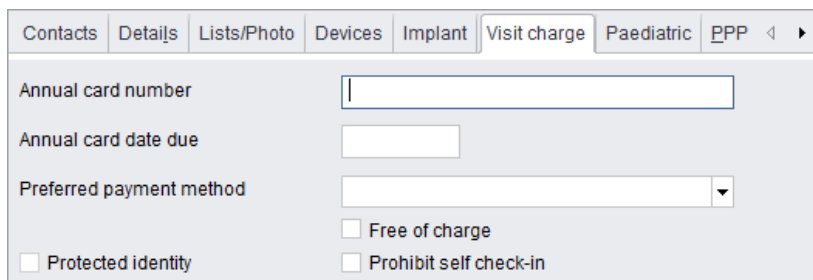
With these settings in place, you will see the following invoice event after having changed a client's status to the status defined in System administration associated with visit charges (usually **Arrived**):

The screenshot shows a window titled "Services to be invoiced" with a close button (X) in the top right corner. Below the title bar are "OK" and "Cancel" buttons. The main area contains several form fields: "Date" (13/01/2020), "Referral" (empty), "Annual card number" (43454546), "Date due" (13/01/2020), "Payment method" (Invoice), and a checked checkbox for "Free of charge". There are also checkboxes for "Select all", "Print full page receipt", and "Print visit receipts", along with a "Modify" button. A table with 8 columns (Service, Invoice, Invoice type, Units, Price, %, Total price, Customer) is displayed. The first row is checked and contains the following data: Service: 1, Invoice: Client, Invoice type: Invoice type 1, Units: 1, Price: 0, %: 100, Total price: 0. The bottom right corner of the window shows "Total price: 0".

Service	Invoice	Invoice type	Units	Price	%	Total price	Customer
<input checked="" type="checkbox"/>	1	Client	Invoice type 1	1	0	100	0

- Here you can enter the client's **Annual card number**, **Date due**, **Payment method** and whether or not the visit is **Free of charge**.
- You have two options for printing:

- Full page receipt (size A4)
- Receipt as label (only possible if you have a label printer set up to your computer)
- The selection you choose for printing will be saved per workstation.
- The **Free of charge** option will not take effect, if the **Date due** has been surpassed and therefore the client is not eligible for the visit to be free of charge. Change the date in order for the **Free of charge** option to take effect again (the **Total price** will be zero when the visit is free of charge).
- If the visit is not free of charge, choose the **Payment method** being either Cash or Credit card.
- If Visit charge features are enabled in System administration it is possible to let the system automatically set the patient to free of charge status depending on age (e.g. if younger than 19 or older than 85).
- All this information will be saved on the Client information screen, under the tab **Visit charge**. The data on the Client information screen is always the most recent.



The screenshot shows a web interface for a client's 'Visit charge' settings. At the top, there is a navigation bar with tabs: 'Contacts', 'Details', 'Lists/Photo', 'Devices', 'Implant', 'Visit charge' (which is active), 'Paediatric', and 'PPP'. Below the navigation bar, the form contains the following elements:

- 'Annual card number': A text input field.
- 'Annual card date due': A date selection field.
- 'Preferred payment method': A dropdown menu.
- 'Protected identity': A checkbox.
- 'Free of charge': A checkbox.
- 'Prohibit self check-in': A checkbox.

- You can also change the default information for the client here.
  - Free of charge, shows if the patient receives services free of charge.
  - Protected identity, shows if the patient has protected identity.
  - Prohibit Self-check-in, shows if self-check-in is allowed for the patient. Can be pre-filled based on symbol or locked if the patient has protected identity.

## 21 Documents and attachments

*Click the button below to access our training materials.*

eLearning

You can write and store ad hoc documents, general letters and reports or set up templates for these documents. The documents can be saved in the database under the client's registration number instead of in separate files.

There is an optional extended licence for this module called File attachments, which enables you to create file types as well as upload and download documents of any format.

The user access to the document types is defined by the settings for the individual user in the system administration. The rights are Read, Create and Update/Delete.

A separate document database can be specified by the System Administrator.

## 21.1 How to handle Documents and attachments

- Press **F3** to search for the client or **Ctrl+F3** to make a quick search.
- Go to **Navigation -> Documents and attachments** or use the shortcut **Shift+Ctrl+U**.
- Your System Administrator configures what rights you have within this module. You either have rights to Read, Create and/or Update/Delete per document type. For that reason, some of the features might not be available to you.
- While you have a document open, you are still able to browse through other Auditbase screens.
- When editing only one document can be open at a time.

*Note: with the extended license **File attachments**, you are able to upload documents of any format type such as .jpg, .pdf and .bmp files, and you will be able to filter documents on **File type**.*

Created	Sent	No.	Modified	Name / Comments	File type	Appointment	Recipients	Site name
02/09/2013		2		Expedite enquiry reply	MS Word document			
23/12/2014		1	16/12/2019	test template	MS Word document			
23/12/2014		2		test template2	MS Word document			
19/02/2015		1	21/04/2015	19/02/2015 all variables	MS Word document			
05/03/2015		1	05/03/2015	Monitoring report	MS Word document			
01/04/2015		1		Sample.pdf	Adobe PDF			
27/04/2015		1		test template 27/04/2015	MS Word document			
30/04/2015		1		test 30/04/2015	MS Word document			
22/06/2015		1		testr	MS Word document			
28/09/2015		1		01AudVars	MS Word document			
29/09/2015		1		Postcode and Location address	MS Word document			
29/09/2015		2		1 Address	MS Word document			
29/09/2015		3		2address	MS Word document			
22/10/2015		1	22/10/2015	audiograms and address	MS Word document			

Type	Name
Client	
All rels. and other contacts marked as CC	
All professional contacts	

### Document types

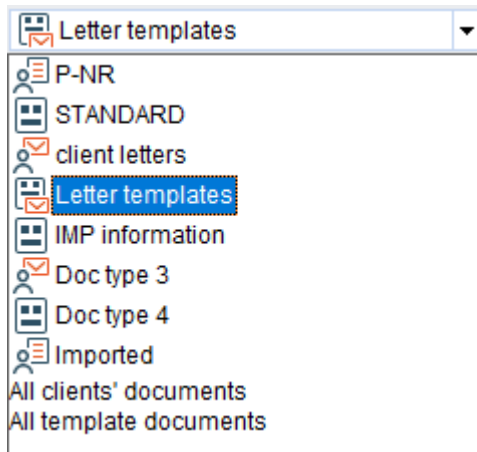
All documents are divided into Patient related documents or Templates. The specific document types are set up in System Administration. A document can also be saved with a patient record. Patient related document types can be a letter type or a document and attachment type.




Templates can also be either a letter template or a document and attachment template. All of this is set up by your system administrator.

If the **Location and Department Filtering** option is licensed then **Document Types** can be filtered by **Location** and/or **Department** with Location groups and the multiple locations options.

A **Document Template** can have a **Location** and/or **Department** which is used for filtering only in the **Letters** dialog.

Document types are identified by an icon:







-  Patient related documents
-  Letter templates
-  Document templates, not letters

## Filters

- The documents listed are the currently available templates or patient related documents and saved letters.
- You can filter on **Document type** (patient related or template) and on **Letters** or **Docs and attachments**.
- You can also filter on **File type** if you have the extended license for **File attachments**.
- You can save a default filter, so you only view the documents relevant to you when opening the module. Choose relevant **Document type**, whether to view Docs and attachments, Letters or All, **File type**, if applicable, and press **Save filter**. This will be your default view when opening **Documents and attachments** in the future.
- Filters are included to view **All client's documents** or **All template documents**, regardless of their **Document Type**.

## Icons and columns in the document list table

	Indicates if the document is a letter.
	Indicates if the document has content.
	Indicates if the document can be edited.
	Indicates if the document is read-only.
<i>Date created</i>	The date on which the document was first saved
<i>Date sent</i>	Will be filled automatically for letters with the date sent where the sent date is recorded. For documents that are generated in the Documents module and not as a letter, this can be added to the document by opening Properties and entering a date.
<i>Date modified</i>	The date on which the document was last changed. If the document was saved from a letter about an appointment, that appointment is the one that appears here. If the document was saved from the Documents module, then any appointment that happened that same day is the one that appears here.
<i>Appointment</i>	If only one appointment occurs for the client that day, and the appointment start time is earlier than the current time, then the action will be attached to that appointment. If the doc was saved from the Documents module but no appointment happened that day, then no appointment will appear here. You can link the document to an appointment by opening its properties and selecting the browse button and <b>Attach</b> .
<i>Name/Comments</i>	Enter name and/or comments directly in the table by clicking in the field, which will open up an editable text area

## Recipients

You can see who have received the highlighted document in the lower table. Highlight a letter or document in the selected patient's letters and the table 'Recipients of highlighted document' at the bottom of the screen will display all those recipients the letter/document was sent to. The relevant icon will be marked, denoting whether the letter/document was posted or emailed.

Edit the properties of a document.

### 21.1.1 Create and edit document templates

- To create a new document template, first select a template document type as your filter and click on **New**.
- To edit a template, choose the document in the list and click on **Edit template**. Enter a **Name** and/or add **Comments** for your template.
- Set up the document as you need with variables and layout.

- You can insert variables in the Word template in 3 ways:
- Place the cursor at the required position in the document and double-click on the variable
- Place the cursor inside the document and click on **Insert variable**
- Click and drag the variable into the required position in the document – it is important that you hold the mouse still above the variable before you click and drag the variable into the required position
- If the **Clinical action** for documents has been activated by your System Administrator and there is only one appointment on that day, the attachment will be made automatically. If there is no appointment or more than one then a box will appear asking you to **Attach** the document to an appointment. Select the required appointment and click **Attach**. If it is not relevant to attach an appointment, click **Close** to close the window without attaching.

MR JOHN SMITH

13/01/2020, 2

Name / Comments

Expedite enquiry reply

Save as new document of type

client letters

Send ... Save and close Cancel

Variables

- Appointment data
- Client data
- Current issued accessories
- Current issued devices
- DHI questionnaire results
- General information
- Implant data
- Latest audiogram data
- Latest tympanometry data
- Letter specific information
- Multi-resurs avtal
- Relevant referral data
- Selected AB Words test 1 data
- Selected AB Words test 2 data
- Selected AB Words test 3 data
- Selected AB Words test 4 data
- Selected AB Words test 5 data
- Selected AB Words test 6 data
- Selected Audiogram&Tymp1 data
- Selected Audiogram&Tymp2 data

Insert variable Insert value

This box can be minimized or maximised by two levels if the  button is selected.

- When finished with your document, click on **Save and close** and the file will appear in the list of documents.
- To close without saving, click on **Cancel**.
- You will be prevented from saving the document if the size exceeds that allowed by your system administrator.
- You can also edit the name of your document directly in the list of documents in the **Name/Comments** field.

- Decide or change the default template document type for the document to save to when applied to a patient. Highlight the document template in the template list. Click **Properties**. Select the **Default type for client document** from the drop-down list. Click **Save**. When you now apply this document template to a patient, the document type it saves to will default to the one you have selected.
- Via **Properties**, you can optionally choose the **Location** and **Department** that can use this template. Also, you can specify the modules where the document template will be available for usage by selecting the corresponding boxes in the **Available in** box.
- **On emailing multiple recipients**, you can choose to send a single email or separate emails for this document template.

Document, attachment and Letter properties
✕

Read only
 The document is a letter
 Content is available
File type

Document type

Description

Date  Default type for client document

Location

Department

Available in

Module	
Booking	<input checked="" type="checkbox"/>
Waiting list	<input checked="" type="checkbox"/>
Referral receipt	<input type="checkbox"/>
Onward referral	<input checked="" type="checkbox"/>

Recipients

Type	Name
Client	
All rels. and other contacts marked as CC	

Highlighted recipient

Name  Postcode

Address

On emailing to multiple recipients

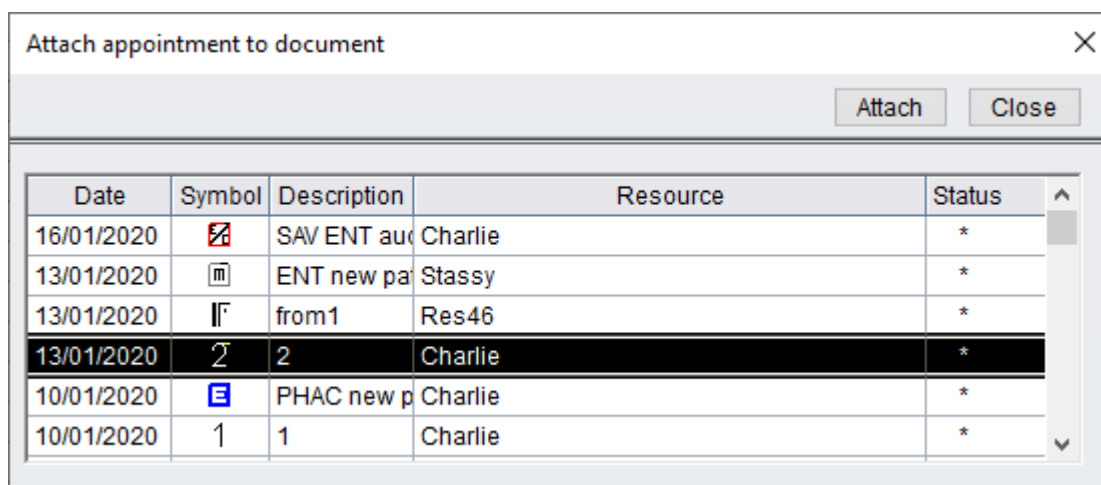
- After a new client document or template is created, the Document list will refresh to show the new document according to the sort order.

**Note:** Occasionally you may have a Word dialogue box open in the background. If the floating dialogue box does not close after you think Word has closed, check your Windows task bar to

see if a Word dialogue has been left open. If it has, close this, the dialogue will then close correctly.

### 21.1.2 Turn templates into patient related documents

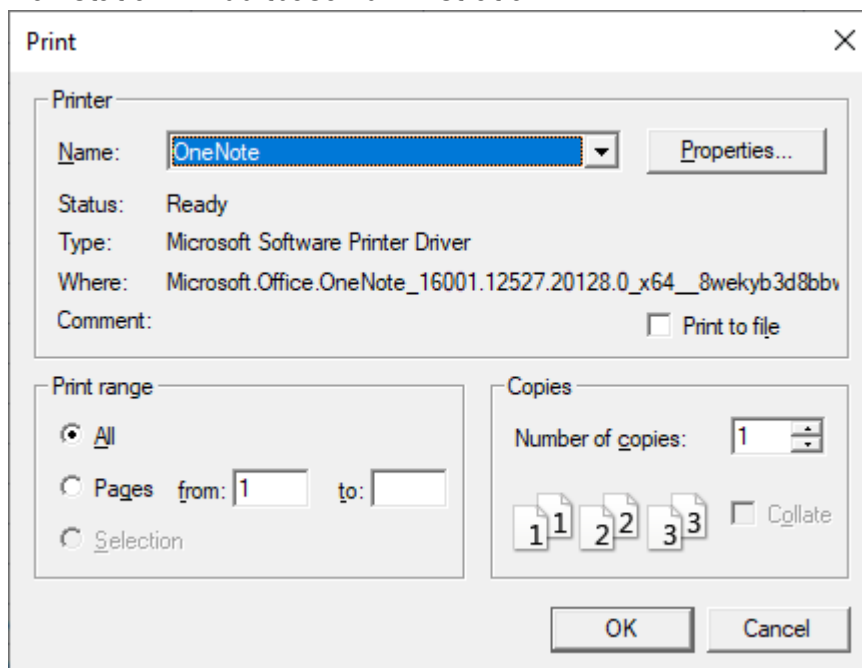
- To edit a template for a client and attach the document to the client, choose the template in the list and click on **Open for client** or double click on a template. This will open the template for the active client only.
- If the **Clinical action** for documents has been activated by your System Administrator and there is only one appointment on that day, the attachment will be made automatically. If there is no appointment or more than one, then a box will appear asking you to **Attach** the document to an appointment. Select the required appointment and click **Attach**. If it is not relevant to attach an appointment, click **Close** to close the window without attaching. This set up will be required if appointment variables are to be used in documents.



- If the variable is linked to a selected clinical action e.g. BKB test, Audiogram or Tympanogram, then the document will request the Auditbase user to select the correct action for the variable being inserted. A selection dialog for this will appear on screen (if opened for a patient) with the list of related actions:



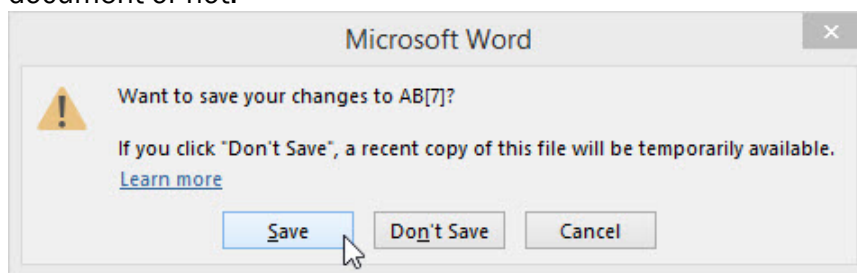
- The **Type** has now changed to a Patient related type, which you can edit to other Patient related document types, and you will see the client name at the top of the floating dialogue.
- The variables within the floating dialog are hidden unless expanded. To expand click the down arrow and a list of available variables will appear. Keeping them hidden by default will make this dialog open quicker, the system will remember the previous state.
- Enter a **Name** and/or add **Comments** for your document.
- Make changes to the layout of the document as you need.
- You can insert values in the Word document in 3 ways:
- Place the cursor at the required position in the document and double-click on the variable
- Place the cursor inside the document and click on **Insert value**
- Click and drag the variable into the required position in the document – it is important that you hold the mouse still above the variable before you click and drag the variable into the required position.
- If the template contains the audiogram graph variable or tympanometry graph, a window will open to allow the user to select which audiogram is to be used. The number for the audiogram variable (there can be up to four) will appear at the top of the Audiogram List dialog.
- Click **Send** and the document will print according to the options set by the System Administrator or email to recipient's dependent on your preferences as set in system administration or on the recipient.
- The document will either be sent to the default Windows printer or a message will appear where you can choose printers, number of copies etc. This depends on the setting for the workstation in Auditbase Administration.



- To change the preferences for this document as a one off, click the browse box next to **Send**. In the pop up that has now opened, change settings between email or print as

needed. Select or de-select available recipients and change whether document should be sent as an attachment or in the body of the email.

- If creating a patient document from Letter, the document will go into the body of the email whereas if creating from the Document module, the information goes into an attachment.
- Use the printer icon at the top of the floating box to print just one copy of the document.
- When finished with your document, click on **Save and close** and the file will appear in the list of documents.
- To close without saving, click on **Cancel**.
- If you close Word without saving, you will be asked whether you want to save the document or not.



- Select **Save** or **Don't Save** as appropriate. Either of these options will close the document. If you want to go back to the document, select **Cancel**
- To print a single copy of a document without opening the document, highlight the document in the table and click the Print once icon on the ribbon (Functions tab).
- To print and/or email a document according to recipient option or to display dialog for print and/or email, highlight the document in the table and click the Send icon on the ribbon (Functions tab).

### 21.1.3 Turn document templates into letter templates and vice versa

You can convert an existing document template into a template that can be used for letters with a CC list and variables pertaining to a future appointment.

- First an existing or a new document template type needs to be defined in System Administration as **Letter templates**. In the Documents and attachments module, select the template type that the document template is in.
- Choose it and click **Edit template**.
- Check the box in the MS Word assistant floating dialog to **Save as a new document**.
- If a new Template type is being used for letter templates then choose that from the Template drop down list.
- **Save and close** the document.
- The new letter template will now be available in the Letter module from **Booking -> Functions -> Letters** where CCs can be added.

You can also build a Word letter template in **Booking -> Functions -> Letters** and save that letter template to Documents.

Note that a CC list cannot be used on Templates in the Documents module; in Documents, you can neither add CCs to Templates nor see Recipient types in Templates saved from the Letters module.

If you need to have CCs in the Documents module you can do the following:

- A CC list can be built for a Client letter in **Booking -> Letters**, either from the pre-set recipients in a letter template or by adding named recipients to the letter. If this letter is saved to the Documents module the recipients are seen there and can be printed from the floating Word dialog using the **Print to all CCs** button at the bottom. The letter can be further edited in Documents and then If Read only is set it must be removed in order to add further recipients.
- Alternatively, a Document can be made either from a Document template or from scratch and specific recipients added to that individual document for printing by opening the Properties window for that doc.

Note that unlike the Letter module there is no facility to print address labels for recipients in the Documents module.

#### 21.1.4 Edit patient related documents

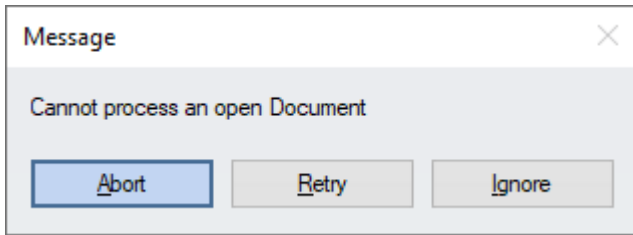
##### Edit

- Chose a patient related document in the document list.
- Click on **Open for client** or double click on a document to edit it.
- Edit **Name** and/or add **Comments** for your document.
- Set up the document as you need with variables and layout.
- You can insert variables in the Word document in 3 ways:
- Place the cursor at the required position in the document and double-click on the variable
- Place the cursor inside the document and click on **Insert variable**
- Click and drag the variable into the required position in the document – it is important that you hold the mouse still above the variable before you click and drag the variable into the required position
- Instead of inserting variables you can insert the current values of the selected client. Either chose a variable in the list of variables and click on **Insert value** or click on **Replace all variables with values** to edit the whole document at once.
- When finished with your document, click on **Save and close** and the file will appear in the list of documents.
- To close without saving, click on **Cancel**.

#### 21.1.5 Issues working with Word

##### Cannot open a document

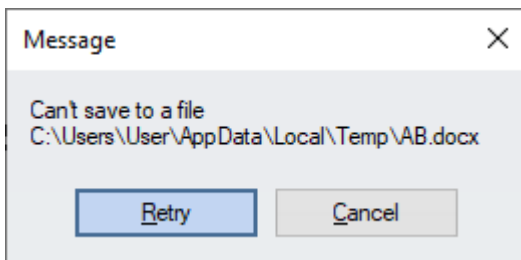
If the system cannot open a template or substitute variables with values because of unexpected technical reasons, it opens MS Word (so that you can see any problems there) and shows a message about the inability to read content, with the options **Retry**, **Ignore**, **Abort**.



Ignoring the error may allow Auditbase to produce a correct document using a slower but more robust way of population.

### Cannot save a document

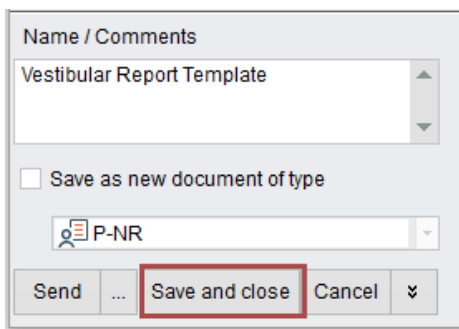
If the system cannot save a document because of unexpected technical reasons, it displays a message with an option to retry (e.g., if more time is needed for Word to save). You can either retry or cancel saving.



If you **cancel** the action, then it is possible to copy the edited content or save and upload the document manually.

### Losing saved changes

Changes will be lost when you open a document in Auditbase, make changes, save those changes to a location outside of Auditbase and close Word by any method without saving those changes also to Auditbase. This happens because the document location has changed. If a document opened from Auditbase is saved from MS Word to a different location, then the button **Save and close** in the Word Assistant floating window must be used to save the document to the Auditbase database if changes are to be retained.



Just closing MS Word will not save the latest changes to Auditbase if **Save as** has been used to change the save location of the document.

### Document locking

Sometimes, while working with Word documents, you may encounter an unwanted lock on a file when a document is edited outside of Auditbase. In this case, the system will display a warning: *'Please close all Word windows or applications that may be using Word before proceeding'*. To resolve the issue, close all Word windows or applications.

### 21.1.6 Edit the properties of a document

- When you have a document selected in the list, select **Functions -> Letter Properties**.

X
Save Cancel

Read only   
  The document is a letter   
  Content is available   
 File type Word document

Description audiograms and address26

Type P-NR   
 Date 26/10/2015  

 When a letter is generated from Booking, it is automatically linked to the appointment it refers to. A document is automatically linked to an appointment which occurred on the same day the document was first saved.
    
 Date sent

Add Remove



Type	Name	Address	Postcode	
Client	FATHER FNAME221 SNAME12	TEST ADDRESS 1231111111111111111111111111111112, 112, 4, 5	EM POST	
Mother	MName	testAddress 1	112	
Father	FNAME	3	2	
Father	1	1	1	

Highlighted recipient

Name     
 Postcode    
 Address

- Here you can see different information about the document such as file type, if the document has content, creation date etc.
- You can also set if the document should be **Read only**, which means other users cannot make changes to the document. A user can only remove this flag, if he or she has the

extended user right “Documents: Remove ‘read only’ flag”, configurable by your System Administrator.

- You can choose if **The document is a letter**. In the document list, a letter icon with a tool tip to the left will reveal that the document is a letter.
- You can enter a **Description** of the document, if it is not **Read only**.
- A special button is available for attaching the document to or detaching it from an appointment. The button has a symbol which reflects the state of the document: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the document linking.

*NOTE: The document is automatically attached to an appointment, if the document was saved from a letter about the appointment. If the document was saved from the Documents module, then any appointment that happened that same day that has the appointment start time earlier than the current time is the one that the document automatically attaches to. If the document was saved from the Documents module but no appointment happened that day, then no appointment will appear here.*

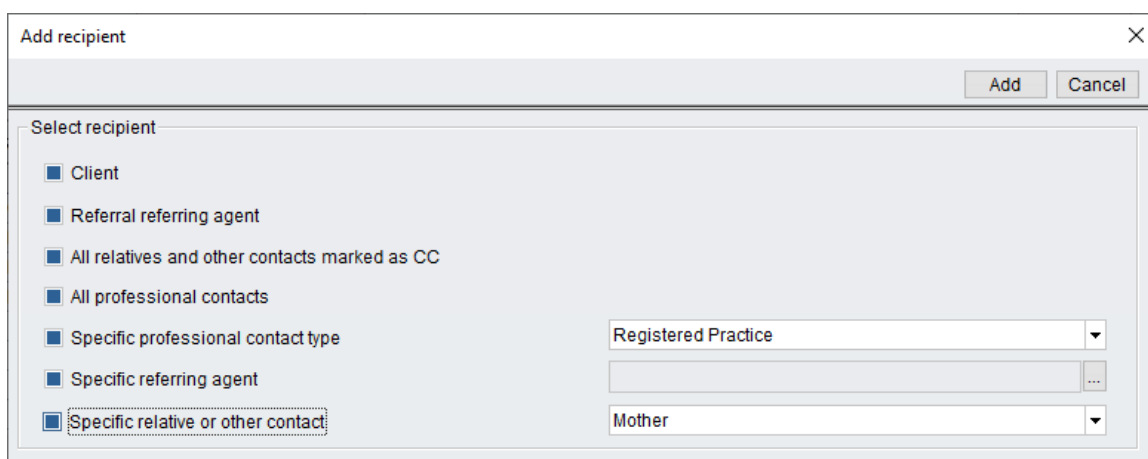
- **Date** is the date the document or letter was first saved.
- If the document or letter is a patient related document or letter, you will see a **Date sent** field. This is the date the document or letter was printed and thereby sent. You can manually add a date, if the document has not been sent.

## Recipients

*Note: You can only add recipients to patient related documents and attachments.*

*To edit an existing letter, you need the extended user right given by your system administrator to add or remove letter recipients after creation.*

- To add recipients, click on **Add**.



- You can add the selected **Client**.
- You can choose to add **All relatives and other contacts marked as CC** in the **Client information** module under the tab **Contacts**.

- You can add **All professional contacts**.
- You can add just a **Specific professional contact type**.
- You can add a **Specific referring agent**.
- And you can add a **Specific relative or other contacts**, even if they have not been marked as CC in the **Client information module**.
- Back in **Properties**, you can remove a recipient or recipient group by choosing the recipients in the list and click on **Remove**.
- Highlight a letter or document in the selected patient's letters and the table at the bottom of the screen will display all those recipients the letter/document was sent to. The relevant icon will be marked, denoting whether the letter/document was posted or emailed.

## 21.2 Importing and exporting documents

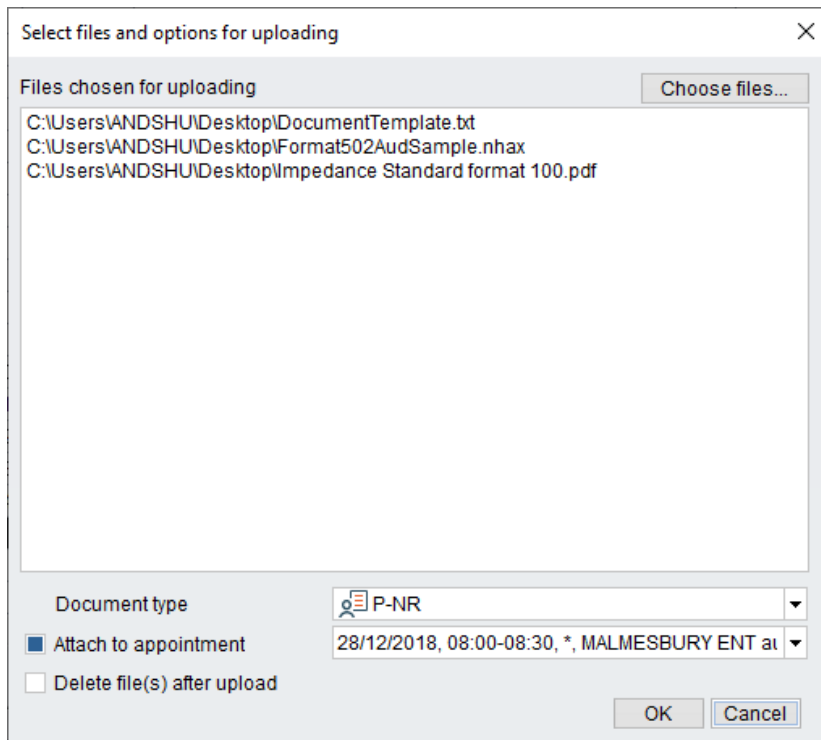
Word documents created outside Auditbase can be pasted into Auditbase as templates or ad hoc documents.

- Open a new document in Auditbase under the document type required.
- Go back to the start menu on your desktop and open your normal word-processing document.
- Choose **Edit** and **Select all**.
- Choose **Edit** and **Copy**.
- Click on the minimised Auditbase document at the bottom of the screen.
- Choose **Edit** and **Paste**.
- Select **File** and **Exit** and click **Yes** to save.
- Type the letter name in the **Name/Comment** field.
- Close your other word-processing document.

### Extended license: File attachments

If you have the extended licence called File attachments, you can upload documents in any kind of format, like .jpg, .pdf etc., by simply using the **Upload** button.

- Open Documents and attachments from **Navigation** -> **Documents and attachments** or use the shortcut **Shift+Ctrl+U**.
- Select **Upload**.
- Choose files you wish to import in the file directory. Multiple files can be selected.
- The **Files chosen for upload** are shown in the window.
- The **Document type** where the chosen files will be stored to, can be selected from the drop-down list.
- There are two further options to **Attach to appointment** and to **Delete file(s) after upload**. These are check boxes which can be selected.
- Once the choices have been made, **OK** will then close the window.
- The document is now imported into Auditbase and attached to the current patient.



With the File attachments extended licence, you can also download documents from Auditbase to your computer.

- Open Documents and attachments from **Navigation** -> **Documents and attachments** or use the shortcut **Shift+Ctrl+U**.
- Highlight a file in the list.
- Select **Download**.
- Choose where to save the file.
- Enter a file name.
- The document is now exported from Auditbase.

## 21.3 Password protected documents

You can limit access to a word-processing document:

- Type the document.
- Select **Tools -> Options -> Security**.
- Set a password to avoid unauthorised access to the document or edition of the document.

## 22 Tests



### Creating a new test

A new test can be created in one of two ways:

- From **Navigation**, select **Tests** and then select the required test.
- From the Auditory Implant module – Expand the referral then expand a stage. The predefined tests will be displayed. Select the required test. The order of the tests is based on the priority order in the System Administration tool -> **Client Scheduling** -> **Client pathway overview settings** -> **Auto-linking settings and ordering**.

Each test has a similar header comprising of:

- **Compare results** – Select to enable a comparison of test results. Tests with scores which are available for comparison over time can be selected according to the date they were performed and the score type in use on each test can be selected for plotting. Only one test from any one day can be used since the comparison is always over time.
- A number of variables can be selected and a graph displayed. This option is for the following tests only:
  - BKB test
  - BKB Sentences (Adaptive or Standard)
  - AB words test
  - CUNY test
- **New** – Select to create a new test.
- **Save** – To save the current test.
- **Delete** – Will remove the selected test from the database.
- **Close** – Will close the test without saving it.
- **Tests** – A drop-down menu which shows existing instances of the test for the client.
- **Created by** – Will display the name of the logged-on user that created each instance of the test.
- **Date of test** – Defaults to the highlighted date, but can be adjusted to reflect the actual date of the test.
- **Age at test** – This is calculated and fixed when saving so that the age will be displayed whenever the test is shown. The age is shown in years unless the patient is less than 5 years old, when years and months are shown.
- A special button is available for attaching the test to or detaching it from an appointment.

The button has a picture which reflects the state of the test: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the test linking.

*NOTE: If only one appointment occurs for the client that day, and the appointment start time is earlier than the current time, then the test will be attached to that appointment.*

- **Referral stage** – This displays the stage in the referral that the appointment is in currently, if a stage can be identified.
- **Test ver.** – Shows the version of the test being used, the default for this is set in the System Administration and can be changed when a new version or edition is released. This means that when auditing test results you can be sure that you are comparing like-with-like. The version can be changed when any test is performed so that non-default versions can still be used.
- **Not administered** - a reason can be selected to record why a particular test was not performed. The drop-down list can be defined by the System Administrator.

For individual tests where percentile is in use, the percentile rank field will take values of -1 and 99+ as well as numeric values. These values are held in the database but values of 0 and 100 are also stored in order to enable plotting graphically.

## 22.1 CELF school age test set up

The **CELF school age** test can have different layouts; **Concise**, **Extended**, **Extended with limited number of values** or **Test Scaled Scores**. The required layout is selected in the System Administration tool -> **Testing** -> **Test settings** -> **General test settings**.

## 22.2 Other speech test

After a hearing assessment, you can do other speech tests to verify primarily special hearing aid types. In the **Navigation** area, under **Tests**, select **Other speech test**.

Other speech test
✕

---

Client
MRS FIRSTNAME106 LASTNAME106
Print
Sign
New
Save
Delete
Close

---

Tests
21/10/2015, 7
Created by
full name tests???

Date of test
21/10/2015
Age at test
26y
Referral stage
Appointment is not linked to referral

---

Not administered
 Non English speaking1

Operative
Pre-operative

Add
Edit
Remove

Test	List	Audiovisual	Direction	Reliable	Result	Level	Noise	HI status R	HI status L	Comment	Te:
Test type	1	Audiovisual	Test Left D	Yes	-99.9	150 dB	-10 dB	Unaided112	HA1	test comment	Total

Click on **Add** to register a new test; a pop up will open. Choose from the drop-down lists and enter the results directly into the different fields. Some column content is configured by your System Administrator.

Once a test has been registered, you can edit or remove the test by highlighting it in the table and clicking either **Edit** (which opens a pop-up window for editing) or **Remove** (deletes the test from the list). You can also edit the test directly in the table by clicking in each field.

You can **Sign** the test so that it is locked for editing, it cannot be changed apart from linking it to an appointment.

The signed user appears on the window title bar.



## 23 Auditory Implant module

With an extended licence for Auditbase, you can have access to the Auditory Implant module, which handles the workflow for Implant patients.

## 23.1 Referral settings

A Treatment Type for Implant needs to be set up by your System Administrator. Please contact your System Administrator for more information.

The Referral Module now shows a client's age in years. If the client is under the age of 5, the age is shown in years and months.

Referral overview | Client's referral | Referral answer | Clinical actions

Referrals: 95061, 30/09/2008, PAEDIATRIC hearing aid journey (PHAC) | Client name: MISS FIRSTNAME1605 LASTNAME1605 | Refresh Cancel

Book | Search and book | Add to list | Add observation | Print referral | Print receipt | Print answer | New | Save | Delete

Selected referral

PathwayID:  Edit

RTT start date: 30/09/2008 | Age at start: 18y | Wait time: 104

Referral date: 30/09/2008 | Other date: 30/09/2008

Treatment type: PAEDIATRIC hearing aid journey (PHAC)

Reason: AUDIOLOGY referral

Customer: SWINDON PCT

Referred by: REGISTERED PRACTICE, MARLBOROUGH SURGE ...

Referring agent ref:

Medical priority:

Referral handling:

Information:  Put on waiting list |  Booked directly | Edit

2y review - during Uni summer break

Interview:  | Client contact date:

bnmv

Registered by: ALISON STAGG

Current status

Outcome: 30a, Treatment commenced | Clock | Stopped

since: 05/03/2020 11:48:17 | Add new | History

Comment: Auto assigned by: 05/03/2020, 30a, PHAC new patient mould-

New outcome status: 30a, Treatment commenced

Waiting list entries Attach Detach | Edit | Show in waiting list

Wait time	Date	Waiting list	Information
-596	30/09/2008	TGW - DOMI new 1	2y review - during Uni summer break

Appointments Attach Detach | Edit | Show in Booking

Date	Time	Symbol	Status	Resource	
06/03/2020	13:00	lf	*	Stassy	.AUDIOLOGY re
05/03/2020	08:00	Pa	*	Res78	.AUDIOLOGY re

Observations and procedures Detach | Edit

Obs no.	SNOMED code	Date	Add	S	Text

Referral stages

Name	Target date and warnings	Current	Active length:
Assessment	10/11/2008	<input type="checkbox"/>	596 w, 2 d
Treatment	30/12/2008	<input type="checkbox"/>	RTT end date: 05/03/2020
Follow up		<input checked="" type="checkbox"/>	RTT end date set by outcome status

## 23.2 Opening the main Auditory Implant module page

To open the main Auditory Implant module, **Navigation** → **Client pathway overview**. The views are described in more detail in the **Client pathway overview**.

The screenshot displays the 'Client pathway overview' for a client named 'MRS FIRSTNAME106 LASTNAME106'. The interface is divided into several sections:

- Navigation Pane (Left):** Contains a 'Favourites' list with items like 'Referral', 'Documents and attachments', 'Waiting list', 'AB Audiogram', and 'Attention list'. Below this is the 'Client pathway view' section with a 'Full pathway' dropdown and a list of dates and referral types, such as '15/08/2019, ++FITTING - from previo'.
- Main Data Entry Area (Center):**
  - Referrals:** Shows '109547, 15/08/2019, ++FITTING - from previous referral'. Includes fields for 'Client name', 'Refresh', and 'Cancel'.
  - Buttons:** 'Book', 'Search and book', 'Add to list', 'Add observation', 'Print referral', 'Print receipt', 'Print answer', 'New', 'Save', 'Delete'.
  - Selected referral:** Fields for 'PathwayID', 'RTT start date' (15/08/2019), 'Age at start' (30y), 'Wait time', 'Referral date' (15/08/2019), 'Treatment type' (++FITTING - from previous referral), 'Reason' (++GP direct referral), 'Customer' (Auto-created customer with code IEMPTY!), and 'Referred by' (\* DR CN BARRY, CORNERSTONE PRACTICE, STAT ...).
  - Waiting list entries:** A table with columns 'Wait time', 'Date', 'Waiting list', and 'Informati'.
  - Appointments:** A table with columns 'Date', 'Time', 'Symbol', 'Status', and 'Resource'.
  - Observations and procedures:** A table with columns 'Obs no.', 'SNOMED code', 'Date', 'Add', 'S', and 'Text'.
  - Referral stages:** A table with columns 'Name', 'Target date and warnings', 'Current', and 'Active length: 21 w, 4 d'. It lists 'Treatment' (14/11/2019, Has been br), 'Follow up' (14/05/2020), and 'Completed'.
- Bottom Section:** 'Current status' showing 'Outcome' (20a, Decision to treat@#5%\*&'?/?!) and 'since' (15/08/2019 16:36). Includes 'Registered by' (Oleksandr Pushchalo) and 'New outcome status' (20a, Decision to treat@#5%\*&'?/?!).

## 23.3 Opening other Auditory Implant Module pages

To open other pages in the Auditory Implant Module, select from the **Navigation-> Implant** → choose which page from the following options:

- Pre-op assessment Form
- Switch on / Review sessions
- Programming sessions
- Rehabilitation sessions
- Implant surgery

## 23.4 Pre-op assessment forms

This screen serves several purposes:

- A checklist that can be used to ensure that all the necessary steps have been completed before moving the patient to the next stage in their pathway.
- A collector for the results that should be produced on the report for that stage.
- A place to record information specific to that stage in the pathway that is not recorded elsewhere in Auditbase.

Pre-op assessment
✕

Client

Print
New
Save
Delete
Close

Assessment

Date

User

Funding authority

Referral

Planned date of surgery

Ear side

Treatment stage

Essential
Optional
Decision
Final
Baseline test results
Counselling

Related data

Initial appt	01/10/2013, PHAC new patient mould~	...
PTA	27/09/2013, no. 1, Pre-operative	...
Aided Aud.	27/09/2013, no. 2, Post-operative 2-5m	...
Tymp	30/09/2013, no. 3	...
OAE		...
Speech tests	30/09/2013, PHAC new patient mould~	...
Hearing Aid trial	30/09/2013, 2	...
Rehab assess	27/09/2013, 2	...
Medical history		...

Clinician

Initial appt	JULIE TYAS	▼	Add concern
PTA	full name tests???	▼	Add concern
Aided Aud.	full name tests???	▼	Add concern
Tymp	full name tests???	▼	Add concern
OAE		▼	Add concern
Speech tests	JULIE TYAS	▼	Add concern
Hearing Aid trial	USER NAME32	▼	Add concern
Rehab assess	USER NAME15	▼	Add concern

Concerns

CT Scan

 L  R  Head

MRI Scan

 L  R  Head


Scans have been reviewed

Action	Concern description	Side	Date	Clinician	User	Comment
CT	Normal cochlea	Righ	01/10	MR ALLE	full n: 234234	
MR	Absent cochlea	Righ	01/10	AMANDA	full n: 123	

The following options are available:

- **New** – Select to create a new test.
- **Save** – To save the current test.
- **Delete** – Will remove the selected test from the database.
- **Close** – Will close the test without saving it.
- **Assessment** – Displays a list of any previous assessment forms.

- **Date** – Defaults to the highlighted date but can be adjusted to reflect the date of the assessment either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **User** – Will be the name of the logged in user.
- **Funding authority** – Will be the client's customer but can be altered if required.
- **Referral** – The relevant referral for the client can be attached to the form using the button.

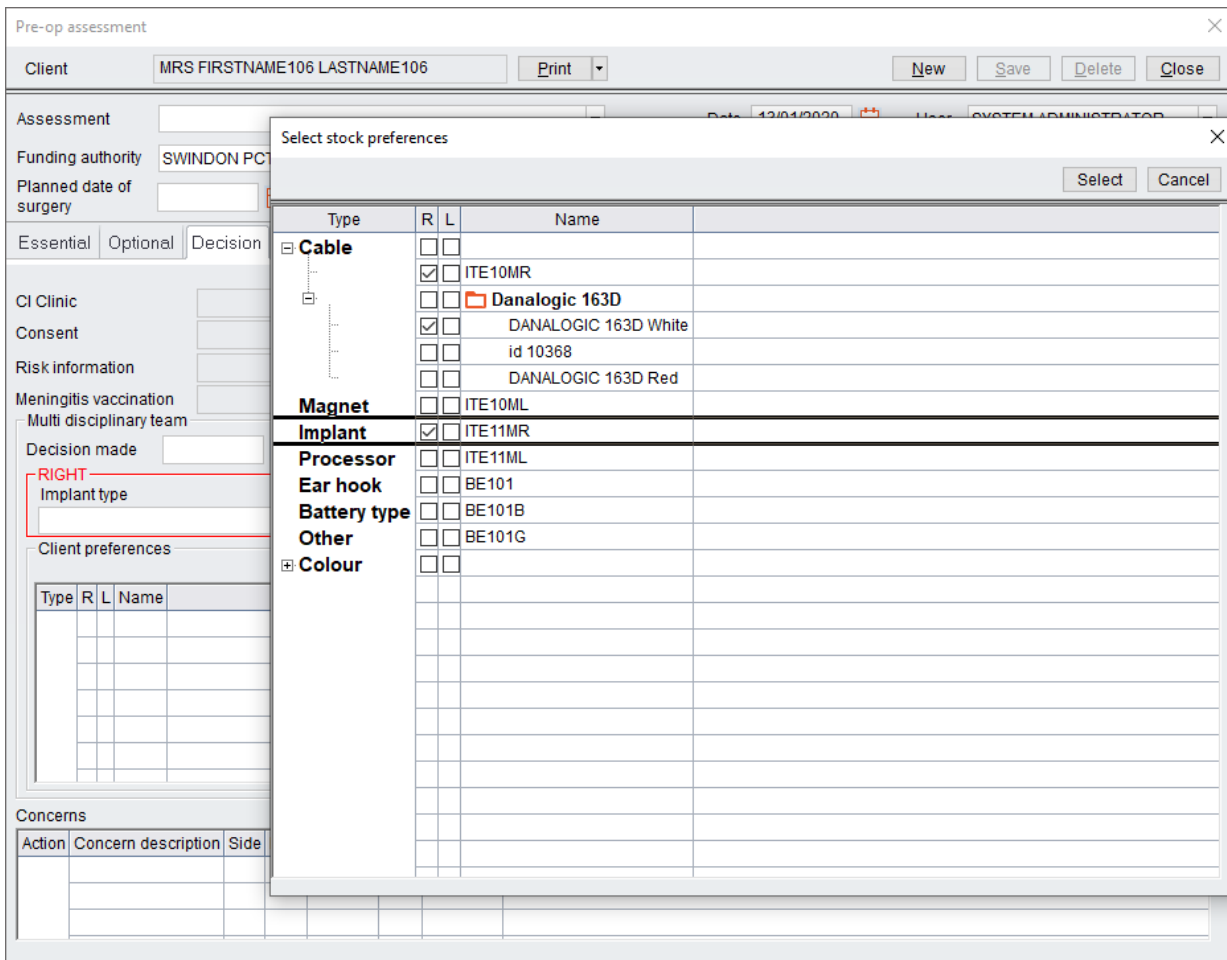
*If the referral does not exist or an existing one cannot be used, you can create a 'quick' referral by clicking the **New** button from the  button to the right of the Referral field. See details in [Quick referral creation](#).*

- **Planned date of surgery** – The date for surgery can be entered manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **Ear side** – Right, Left or Binaural can be selected. This is a mandatory field.
- **Treatment stage** – If a Referral has been selected above, the relevant treatment stage is displayed here.
- **DR-Med** – it is now possible to create a new DR-Med questionnaire from the Pre-Op Assessment form in the Implant Module.

There are a number of tabs which can be selected. These tabs show different information under the following headings:

- **Essential**
- **Related data** – Various tests and appointments that are stored in Auditbase can be added including Initial appointment, PTA, Tymp, OAE etc. can be added to the form by selecting the browse button.
- **Clinician** – The user that saw the client can be added from this drop-down menu. Clinician can be used if Resource is not linked to a specific staff member and you want to manually assign the staff member involved.
- **Concerns** –
  - **Adding Concerns** - These can be added to the form by selecting the **Add concern** button. Once selected, the **Concern name** can be chosen from the drop-down menu. The **Type of action**, ear **Side** and **Date** can be added and a **Clinician** should be pre-selected from the appointment or test that the concern is logged against. There is a text box for comments.

- **Viewing Concerns** - The concerns from each tab are then displayed at the bottom of each tab page. You can see the action the concern came from. Numerous concerns can be displayed.
- **Show all** - All concerns can be shown regardless of which tab they were inserted under.
- **CT Scan** - It can be indicated if a left, right or head CT has been performed, on which date and by whom. A concern can be added in the same way as above.
- **MRI Scan** - It can be indicated if a left, right or head MRI has been performed, on which date and by whom. A concern can be added in the same way as above.
- **Optional** - Various **Related data**, **Clinicians** and **Concerns** can be added in the same way as the essential tab.
- **Decision** - Various **Related data** and data specific to the team decision and client's choices can be saved here. The implant decision or **Discharge reason**, **Clinicians** and **Concerns** can be added in the same way as the **Essential** tab. In this tab, there is now a section where multiple client preferences can be selected relating to their accessories. Where these have been selected they will transfer through to the Client Information tab.



- **Multi-disciplinary team** - Decisions made by the multi-disciplinary team can be recorded including the date of decision and any **Discharge reason**.

- **Implant type** – **Right** and **Left** are identical options. There are a number of options from the drop-down menus. These are set up by the system administrator. These client preferences are transferred to the **Client Information** module on the **Implant** tab. This is done by selecting the **Copy to Client Information** button.
- **Final** – Various related data, clinicians and concerns can be added in the same way as the **Essential** tab.
- **Baseline test results** - Tests performed during the stage can be selected. The results of these tests will be the ones which are included on the report for that stage. Other instances of these tests may have been performed in that stage which you may not want to include in the summary. The tests will be grouped under the same test type and some summary results will be seen. A **New test** can be created, the list of available tests and any custom questionnaires will be listed and can be selected. The selected test or questionnaire will open in a new window. Tests can be viewed by selecting a test and choosing **Open**. The appropriate test will be displayed. Additional tests can be added using **Attach** or removed using **Detach**. The order of the tests is based on the priority order in the System Administration tool -> **Client Scheduling** -> **Client pathway overview settings** -> **Auto-linking settings and ordering**.
- **Counselling** – Appointments are shown in chronological order with a series of counselling topics which can be checked to show they have been covered. There are 4 user definable topics that are set by the system administrator.
- **Questionnaires** – These can be added by selecting the button and attaching any previously completed questionnaires.
- **Concerns** can be added in the same way as above.

## 23.5 Switch on / Review sessions

This screen serves several purposes:

- A checklist that can be used to ensure that all the necessary steps have been completed before moving the patient to the next stage in their pathway.
- A collector for the results that should be produced on the report for that stage.
- A place to record information specific to that stage in the pathway that is not recorded elsewhere in Auditbase

Switch on / Review sessions
✕

---

Client 
Print ▼
New Save Delete Close

---

Reviews

Review date

User

---

Treatment stage

Referral

---

Purpose

Upgrade due date

Ear side

---

Main data
Attached tests and other
Issued devices and accessories

Programming sessions Attach Detach New Open

Rehab sessions Attach Detach New Open

Date	Purpose of session
01/10/2013	Mapping requested

Date
01/10/2013

**Middle ear status (Right)**

 Condition    
 Result

**Middle ear status (Left)**

 Condition    
 Result

**Programming summary**

**Rehab summary**

---

**Audiometry**

	Condition left ear	Condition right ear	
PTA	<input type="text" value="Unaided112"/>	<input type="text" value="HA1"/>	<input type="text" value="27/09/2013, no. 2, Post-operative 2-5m"/>
AA	<input type="text" value="Unaided112"/>	<input type="text" value="Unaided112"/>	<input type="text" value="27/09/2013, no. 1, Pre-operative"/>

---

Preservation of hearing

ENT review

---

Expectations Q

Other Q

---

Information Pack


---

Report Sent

There are the following options:

- **New** – Select to create a new session.
- **Save** – To save the current session.
- **Delete** – Will remove the selected session from the database.
- **Close** – Will close the session without saving it.


- **Reviews** – Displays a list of any previous sessions.
- **Review Date** – Defaults to the highlighted date but can be adjusted to reflect the date of the session either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **User** – Will be the name of the logged in user.
- **Treatment stage** – If a Referral has been selected above, the relevant treatment stage is displayed here.
- **Referral** – The relevant referral for the client can be attached to the form using the button. This is a mandatory field; a referral must be selected.

*If the referral does not exist or an existing one cannot be used, you can create a 'quick' referral by clicking the **New** button from the  button to the right of the Referral field. See details in [Quick referral creation](#).*

- **Purpose** – The purpose of the session can be selected from the user defined drop down list.
- The selection here will define which date appears on the **Implant** tab on the **Client Information** screen. If **Switch-on/Re-implant** is selected, then the date on this form will transfer to **Latest Switch on date** in **Client Information**.
- **Upgrade due date** – Can be selected from the calendar
- This date is calculated depending on the value of the field in the Administration tool under **Implant module definitions - General settings - General settings**. It will add this period to today's date when opening a new form
- This date will be shown on the Client Information screen - Implant tab – Upgrade Due date
- **Ear side** – Right, Left or Binaural can be selected. This is a mandatory field.

There are a number of tabs which can be selected. These tabs show different information under the following headings:

- **Main data** – Multiple Programming and Rehabilitation sessions can be recorded and saved. Any of these can be linked to a Switch-on/Review screen. They will be linked automatically if they are opened using the **New** button on the Switch-on/Review screen or can be attached after saving.
- **Attach** – Can be used to attach a Programming or Rehabilitation session. Once selected, choose the required session and **Select**.
- **Detach** – Can be used to remove a selected Programming or Rehabilitation session.
- **New** – This will create a new Programming or Rehabilitation session.
- **Open** – This will open a selected Programming or Rehabilitation session for viewing.
- **Condition** – The condition of the middle ear can be selected from the drop-down menu and further information can be added to the free text box.
- **Result** – Tympanometry results can be selected from the drop down menu.
- **Programming summary** – Additional information can be added to this free text box.
- **Rehab summary** – Additional information can be added to this free text box.

- **Audiometry** – Results from audiometry can be displayed.
  - Condition left or right ear – The type of audiometry can be displayed by selecting from the drop-down menu.
  - An audiogram can be selected by using the browse button . This can either be attached to the session or just viewed by selecting **Show**.
- **Preservation of hearing** – This can be selected from the drop-down menu.
- **ENT review** – The date of an ENT review and the name of the referring agent can be added.
- **Expectations Q** – The date and a user can be added to show when this questionnaire was completed.
- **Other Q** – The date and a user can be added to show when another questionnaire was completed.
- **Information Pack** – The date and a user can be added to show when an information pack was given to the client.
- **Report sent** – The date and a user can be added to show when a report was sent for this client.
- **Attached tests and other** – Once a review has been selected, any tests that have been attached to that session can be observed.

Tests performed during the stage can be selected. The results of these tests will be the ones which are included on the report for that stage. Other instances of these tests may have been performed in that stage which you may not want to include in the summary. The tests will be grouped under the same test type and some summary results will be seen. Tests and questionnaires can be added in the following manner:

- **New test** - A list of tests and questionnaires will be shown. Select from the list and complete the test then **Save** and **Close**.
- **Open** - If a test is already attached, the test can be viewed by selecting the test and choosing **Open**. The test will then be displayed.
- **Attach** – By selecting **Attach**, all currently saved tests and questionnaires will be displayed. Check the required test and **Select**. These will then be added to the session.
- Any test or questionnaire can be removed by selecting it and then using the **Detach** button. Tests can be viewed by selecting a test and choosing **Open**. The appropriate test will be displayed. Additional tests can be added using **Attach** or removed using **Detach**. The order of the tests is based on the priority order in the System Administration tool -> **Client Scheduling** -> **Client pathway overview settings** -> **Auto-linking settings and ordering**.
- **Issued devices and accessories** - Once a review has been selected, any stock articles that have been attached to that session can be observed. Articles can be added in the following manner:
  - **Issue device** - A search dialogue will be shown.
    - Add a serial number or article name to the search fields. **Please note that these fields are case sensitive.**

- Articles can be filtered using the **Default filter view** button. By selecting this, options are shown for various **Articles** and **Stock Types**.
- Select **Search**.
- Select from the list ensuring the left-hand column in the table is checked and then **Issue**.
- A New status for serial number: XX or New status for quantity controlled article: XX window will appear.
- Select a **Location** if relevant.
- Select the new **To stock type**.
- Depending on the selection, a number of other fields will need to be completed in the same way as for issuing an article from the **Stock** module directly. Once the options have been selected, select **OK**.
- The selected article will now be included in the table.

*NOTE: Changes in device statuses create clinical actions. If you have attached them to appropriate appointments, they can be seen on the **Clinical actions** tab of the **Referral** module.*

- **Attach** – By selecting **Attach**, all currently issued articles will be displayed. Check the required article and **Select**. These will then be added to the session.
- Articles can be removed from the list by using the **Detach** button.
- **Warranty registration** – A **Right** and **Left** check box are available to show that the warranty registration for an implant has been sent back to the manufacturer.



## 23.6 Programming sessions

This screen serves several purposes:

- A checklist that can be used to ensure that all the necessary steps have been completed before moving the patient to the next stage in their pathway.
- A collector for the results that should be produced on the report for that stage.
- A place to record information specific to that stage in the pathway that is not recorded elsewhere in Auditbase

Multiple instances of Programming screens can be recorded and saved. Any of these can be linked to a Switch-on/Review screen. They will be linked automatically if they are opened using the **New** button on the Switch-on/Review screen or can be attached after saving using the **Attach** button.

- **New** – Select to create a new session.
- **Save** – To save the current session.
- **Delete** – Will remove the selected session from the database.
- **Close** – Will close the session without saving it.
- **Sessions** – Displays a list of any previous sessions.

- **Session Date** – Defaults to the highlighted date, but can be adjusted to reflect the date of the session either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **User** – Will be the name of the logged in user.
- **Purpose of session** – The purpose of the session can be selected from the user defined drop down list.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.
- **Referral stage** – This displays the stage in the referral that the appointment is in currently, if a stage can be identified.

There are two tabs which can be selected. These tabs show different information under the following headings:

- **Main data** – A number of check boxes, free text boxes and drop-down lists can be selected. The drop-down lists can be defined by the System Administrator. In this section the Processor type has now had Hearing Aid added, as this particular drop down is hard-coded it is only possible to have changes made by the developers.
- A reason for electrode deactivation can be added by clicking in the **Reason** field under **Electrode reason** and selecting from the drop-down list. The reason lists can be defined by the System Administrator.
- **Electrodes in use** – The current electrodes in use can be entered into this box. The **Electrodes in use (previous)** box will display the previously saved figure. The number of electrodes entered can be up to twenty one.
- **Additional data** – More information can be added to the number of free text boxes and drop-down lists.
- **Program** – Is a free text box.
- **Strategies** and **Add-ons** are drop down lists configured by the System Administrator. Where more than one **Add on** is in use for a **Strategy**, that **Add on** pair can be defined as a new one by the System Administrator.

## 23.7 Rehabilitation sessions



This screen serves several purposes:

- A collector for the results that should be produced on the report for that stage.
- A place to record information specific to that stage in the pathway that is not recorded elsewhere in Auditbase.

The screenshot shows the 'Rehabilitation sessions' form. At the top, there's a client field with 'MRS FIRSTNAME106 LASTNAME106' and a 'Print' button. Below that are 'New', 'Save', 'Sign', 'Delete', and 'Close' buttons. The 'Sessions' dropdown is set to '01/10/2013', 'Session date' is '01/10/2013', 'User' is 'full name tests???' and 'Referral stage' is 'Assessment'. The main area is titled 'Session content or aim' and contains several sections with text input fields: 'Session details' (1), 'Speech' (5), 'Goals identified' (2), 'Receptive language' (6), 'Management plan' (3), 'Expressive language' (7), 'Other (eg. attention, school liaison, play)' (4), and 'Listening' (8). At the bottom, there are checkboxes for 'User checkbox 1' and 'User checkbox 2', and a 'Device use' field with a value of '6' and the text 'hours per day estimate (0 to 24)'.

Multiple instances of Rehabilitation sessions can be recorded and saved. Any of these can be linked to a Switch-on/Review screen. They will be linked automatically if they are opened using the **New** button on the Switch-on/Review screen or can be attached after saving using the **Attach** button.

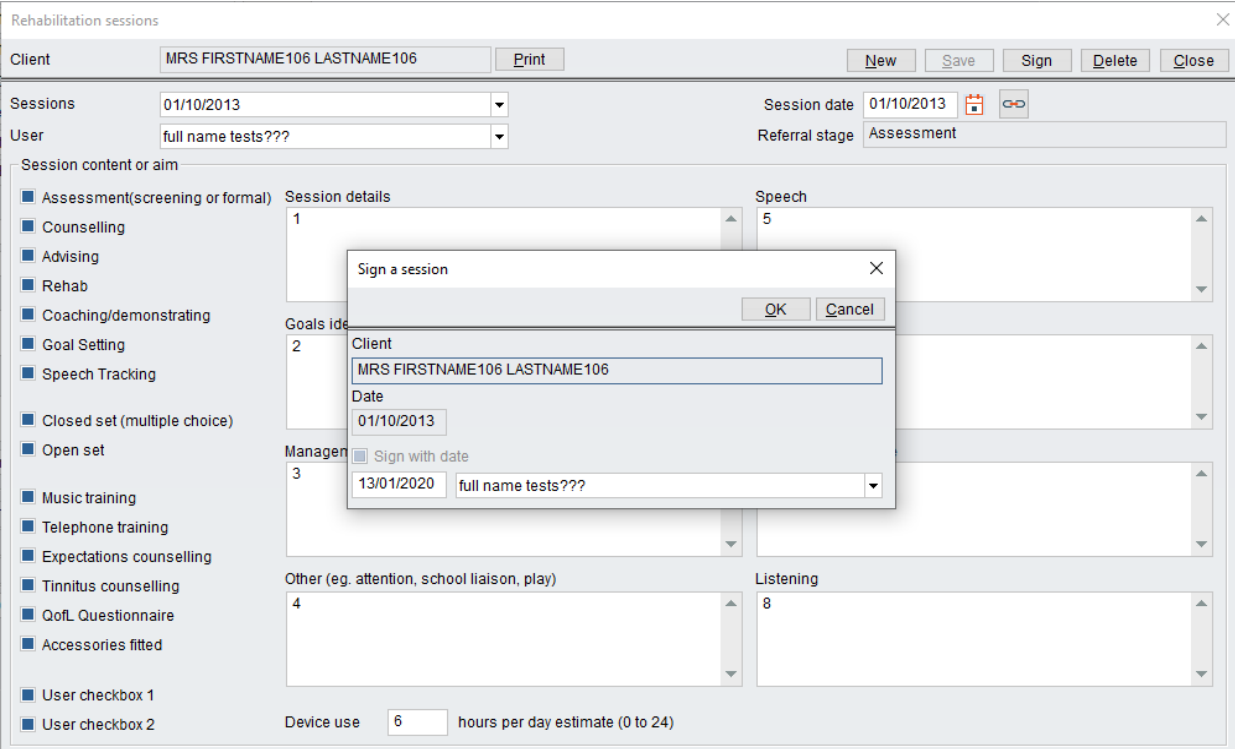
- **New** – Select to create a new session.
- **Save** – To save the current session.
- **Delete** – Will remove the selected session from the database.
- **Close** – Will close the session without saving it.
- **Sessions** – Displays a list of any previous sessions.
- **Session Date** – Defaults to the highlighted date, but can be adjusted to reflect the date of the session either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **User** – Will be the name of the logged in user.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either

attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.

- **Referral stage** – This displays the stage in the referral that the appointment is in currently, if a stage can be identified.
- **Device use** can be used to record hours in use (0- 24 hours).

Information can be added to the various check boxes and free test boxes. **User check box 1** and **2** labels at the bottom left of the screen can be defined by the System Administrator. Checkboxes are grouped into roughly child or adult at the top, adult at the bottom and closed/open set question in the centre.

When saving the Rehabilitation session it is possible to Sign and Lock the data. This is done by pressing **Save** and the following pop-up will appear:



The screenshot shows the 'Rehabilitation sessions' form with a 'Sign a session' pop-up dialog. The form includes fields for Client (MRS FIRSTNAME106 LASTNAME106), Sessions (01/10/2013), User (full name tests??), Session date (01/10/2013), and Referral stage (Assessment). The 'Sign a session' dialog has fields for Client (MRS FIRSTNAME106 LASTNAME106), Date (01/10/2013), and a 'Sign with date' checkbox. The 'Sign with date' checkbox is checked, and the date field is filled with 13/01/2020. The dialog also has 'OK' and 'Cancel' buttons.

Selecting the **sign with date** box will allow the user to lock the data which has been entered therefore preventing anyone from editing the information. It is possible to **Save** the document without signing it and then review and **Sign** later.

If **Save** is selected and sign with date is not completed then the **Sign** button will become available for selection in the top right corner. Selecting it will provide a pop-up where the information is filled and the user selects **OK** to save and sign.

Sign a session
✕

---

**Client**

**Date**

Sign with date

▼

When looking at the previous sessions there is information in the heading to state by whom it was signed and locked.

Rehabilitation sessions
✕

---

<b>Sessions</b>	<input type="text" value="01/10/2013 - Locked and signed by full name te"/>	<b>Session date</b>	<input type="text" value="01/10/2013"/> <input type="button" value="📅"/> <input type="button" value="🔄"/>
<b>User</b>	<input style="width: 100%;" type="text" value="full name tests???"/>	<b>Referral stage</b>	<input type="text" value="Assessment"/>

## 23.8 Implant surgery

This screen serves several purposes:

- A collector for the results that should be produced on the report for that stage.
- A place to record information specific to that stage in the pathway that is not recorded elsewhere in Auditbase.

Implant surgery

Client: MRS FIRSTNAME106 LASTNAME106

Surgeries: 02/10/2013 Date: 02/10/2013   Active User: SYSTEM ADMINISTRATOR

Referral: 03/10/2013, x DO NOT USE-VRA Treatment stage: Treatment

Implant data and summary | Approach/entry | Anchoring and closure | Postoperative | Explant | Intra-Op audiology | Complications

Summary

Ear side: Left Procedure name: Initial implant Age at surgery: 24y

Implant type

Right Electro acoustic implant Left Electro acoustic implant Surgeon: MISS SE CHALSTREY, CONSULT

Summary from other tabs, fill here or on other tabs

Ossification: Partial Electrodes usable inside: 3

Insertion: Partial Electrodes outside: 4

Implant requires explant:  34

Additional details of procedure



Code	Name

Implant data


Implant details

Modified date	Stock type to	Article	L/R	User	Serial number	Notes	Qty

Multiple instances of Implant surgery screens can be recorded and saved.

- **New** – Select to create a new session.
- **Save** – To save the current session.
- **Delete** – Will remove the selected session from the database.
- **Close** – Will close the session without saving it.
- **Surgeries** – Displays a list of any previous sessions.
- **Date** – Defaults to the current date, but can be adjusted to reflect the date of the session either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **User** – Will be the name of the logged in user.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.

- **Referral** – The relevant referral for the client can be attached to the form using the button. This is a mandatory field.

If the referral does not exist or an existing one cannot be used, you can create a 'quick' referral by clicking the **New** button from the  button to the right of the Referral field. See details in [Quick referral creation](#).

- **Treatment stage** – The relevant treatment stage is displayed here.
- **Active** – A check box can be selected to show that the client is active.
- **Add compl.** – A surgical complication can be added on any of the tabs below by selecting this button.

- Select a complication from the drop-down list **Surgery Compl.** Select a **Side**, **Date**, **User** and add a **Comment** if required. Select **Add** to include this in the list of complications or **Cancel** to leave the screen without saving.

There are a number of tabs which can be selected. These tabs show different information under the following headings:

- **Implant data and summary** – Information from a number of drop-down lists can be selected. The drop-down lists can be defined by the System Administrator.
  - **Ear side** – Right, Left, Unknown or Binaural can be selected. This is a mandatory field.
  - **Procedure name** – The name of the procedure can be selected from the drop-down menu.
  - **Age at surgery** – Will display the client's age at the date of surgery not their current age.
  - **Implant type** – This can be selected for **Right** and **Left**.
  - **Surgeon** – Can be selected from the Referring Agents table using the button.
  - **Summary from other tabs, fill here or on other tabs** – Selections can be made from the drop-down boxes if there are no entries in other tabs.
  - **Additional details of procedures** - Can be added using the **Add/Remove** button. By selecting this, a list of procedures is displayed. **Procedures** can be selected from this list.

- **Implant details** - Any stock articles that have been attached to that session can be observed. Articles can be added in the following manner:
  - **Issue device** - A search dialogue will be shown.
  - Add a serial number or article name to the search fields.

*Please note that these fields are case sensitive.*

- Articles can be filtered using the **Default filter view** button. By selecting this, options are shown for various **Articles** and **Stock Types**.
- Select **Search**.
- Select from the list ensuring the left-hand column in the table is checked and then **Issue**.
- A New status for serial number: XX or New status for quantity controlled article: XX window will appear.
- Select a **Location** if relevant.
- Select the new **To stock type**.
- Depending on the selection, a number of other fields will need to be completed in the same way as for issuing an article from the Stock module directly. Once the options have been selected, select **OK**.
- The selected article will now be included in the table.

*NOTE: Changes in device status create clinical actions. If you have attached them to appropriate appointments, they can be seen on the **Clinical actions** tab of the **Referral** module.*

- **Attach** – By selecting **Attach**, all currently issued articles will be displayed. Check the required article and **Select**. These will then be added to the session.
  - **Detach** - Articles can be removed from the list by using the **Detach** button.
- **Approach/entry** – A number of drop-down and free field text boxes are shown and information can be added to them.
  - **Anchoring and closure** - A number of drop-down boxes are shown and information can be added to them.
  - **Postoperative** - A number of drop-down and free field text boxes are shown and information can be added to them.
  - **Explant** - A number of drop-down and free field text boxes are shown and information can be added to them. Check the **Explant performed** box to make the options active.
  - **Intra-Op audiology** – Information from a number of free text boxes and drop-down lists can be selected.
  - **Complications** – Surgical complications can be added by selecting either **Add** or **Add compl**. Both have the same function.
    - Select a complication from the drop-down list **Surgery Compl**.
    - Select a **Side, Date, User** and add a **Comment** if required.

- Select **Add** to include this in the list of complications or **Cancel** to leave the screen without saving.



## 23.10 Additions to other Auditbase screens

### 23.10.1 Client Information screen

An additional tab has been added to the **Client Information** screen. This is the **Implant** tab.

Contacts Details Lists/Photo Devices **Implant** Visit charge Paediatric PPP < >

Invoice services Print device info report

**RIGHT**

Implant type  
Electro acoustic implant

First surgery date: 03/03/2013  
Latest surgery date: 02/10/2013  
First switch-on date: 01/10/2013  
Latest switch-on date: 01/10/2013  
Upgrade due date: 01/10/2013

**LEFT**

Implant type  
Electro acoustic implant

First surgery date: 03/03/2013  
Latest surgery date: 02/10/2013  
First switch-on date:   
Latest switch-on date:   
Upgrade due date:

Client preferences Select

Type	R	L	Name
<b>Cable</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ITE10MR
<b>Magnet</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ITE10ML
<b>Ear hook</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BE101
<b>Battery type</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BE101B
<b>Other</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	BE101G

Immunisation  
Status  
Date 📅

Surgical consent  
Date 📅

Consortium (Customer Group)  
Funding Status  
Implant keyworker

The top section shows information from various **Implant** screens including:

- **Implant type** – From the **Implant surgery** screen.
- **First surgery date** – From the **Implant surgery** screen.
- **Latest surgery date** – From the **Implant surgery** screen.
- **First switch-on date** – From the **Implant surgery** screen.
- **Latest switch-on date** – From the **Implant surgery** screen.
- **Upgrade due date** - From the **Switch on / Review sessions** screen.
- **Client preferences** – From the **Decision** tab on the **Pre-op assessment form**. These preferences can be overwritten as choices change.
- **Immunisation and Status** – Choose an immunisation and/or a status e.g. Immunized, Patient advised, Parent advised or GP advised. Double-click in the date field for today's date or chose a date by clicking on the calendar icon.

- **Surgical consent** – Indicate whether or not consent has been given to e.g. use pictures of the patient for educational purposes or scientific research. Double-click in the date field for today's date or chose a date by clicking on the calendar icon.
- **Consortium (Customer Group)** – A consortium or group of customers can be added by selecting from the drop-down list. This list is populated by the following method and assumes that **Customers** have been set up:
  - From the **Client Information** screen select **Functions** in the menu bar.
  - Select **Settings**.
  - Select **Customer Groups**.
  - Select **New** and enter a name for the **Customer group**.
  - Other details can be added as required.
  - **Save** the new group. Once this has been done, group members can be added.
  - Select the required **Customer group** and choose the **Edit group members** button.
  - A list of available customers will be displayed. These can be chosen by highlighting them and using the **Add** button. Customers can be removed from a group using the **Remove** button.
  - Once the customers have been selected, **Close** the window.
  - **Close** will then save the customer group.
  - A group can be removed by using the **Delete** button.
- **Funding status** – This is a drop-down list that can be defined by the System Administrator.
- **Implant keyworker** - This field displays a list of users, one of which can be selected.

## 24 Surgery Module

An optional module for entering Surgery details is available. It is possible to record pre-operative and perioperative assessment and post-operative follow-up data for three main ear surgery types.

- Otosurgery
- Stapes surgery
- [Implant surgery](#) – using existing screens from the Auditory Implant module.

For complete research data, the majority of field options are hard-coded and are not user definable. The two user definable fields in each type of surgery can be defined in the System Administration tool. Client drop out and the reason for it, can be recorded.

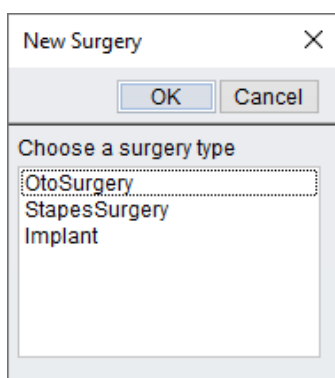
Surgery stages can be linked to appointments either automatically or manually. Referrals can be attached to surgeries, this can either be made mandatory or non-mandatory in the System Administration tool.

Planned clinical actions will be visible in the Client Pathway Overview. These clinical actions include Pre/Per-operative, Postoperative 2-5 month follow-up and Postoperative >12 month follow-up for Otosurgery and Stapes surgery.

User reports have been added to include:

- Audiometric outcome and surgery data reports
- Visual histograms and CSV export for full research

To open the Surgery module, **Navigation** → **Surgery** or **Ctrl+Shift+Y**. If the client does not already have an ongoing surgery, a window is displayed for you to select the type of surgery required.



Double-click on the required surgery or highlight it and click **OK**. **Cancel** will close the window without selecting a surgery.

**Be aware:** *Before proceeding, please make sure the correct client is selected to avoid incorrect operation planned.*

## 24.1 OtoSurgery

There are tabs for **Pre/Per-operative**, **Postoperative 2-5 month follow-up**, **Postoperative >12 month follow-up** and **Drop Out** along the top of the page showing different information.

**General data** will display the Operation information on each tab, it can only be edited on the first tab, the same information is displayed but greyed out on the others.

Other indications and diagnosis are also shown above each tab.

To save an OtoSurgery, the minimum data required to be entered is **Op. side**. **Date** is also required but is set to today's date by default. If **Referral** has been made mandatory, this will need to be saved as well.

The screenshot shows a software window titled "Surgery" with a close button (X) in the top right corner. The window contains several tabs: "Pre-/per-Operative Assess", "Post-Operative follow up 2-5m", "Post-Operative follow up >12m", and "Drop-out". The "Pre-/per-Operative Assess" tab is active.

At the top, there is a "Client" field with the value "MRS FIRSTNAME106 LASTNAME106" and a "Surgery type" dropdown menu set to "OtoSurgery". To the right are buttons for "Select", "New", "Delete", and "Close".

The "General data" section includes:
 

- Date of surg.: 17/07/2018 (with a calendar icon)
- Age: 29y
- Op.Side: Right (dropdown)
- Op.Number: (dropdown)
- Per-operative diagnosis: (dropdown)
- Referral: 21/08/2016, ++AUDIO REVIEW reass (with a dropdown arrow)
- Surgeon: (dropdown)

 Below these are several checkboxes:
 

- Hearing impairment
- Need a HI
- Vertigo
- Discharge
- Tinnitus
- Wish to swim
- Cholesteatoma
- Care
- Checkbox 2

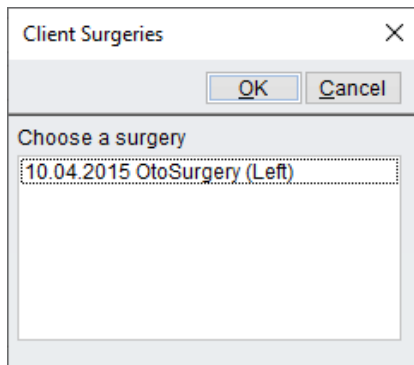
The "Pre-/per-operative data" section contains:
 

- Status of ear at surgery: Dry ear (dropdown)
- Tympanosclerosis: (dropdown)
- Eustachian tube function: (dropdown)
- Origin of cholesteatoma: (dropdown)
- Approach: (dropdown)
- Myringoplasty: (dropdown)
- Ossiculoplasty: (dropdown)
- Type of graft: (dropdown)
- Prosthesis material: (dropdown)
- Prosthesis type: (dropdown)
- Batch: (text field) Lot: (text field)
- Added to gel foam: (dropdown)
- Anaesthetic: (dropdown)
- Chorda tympany: (dropdown)
- Field3: (dropdown)
- Field4: (dropdown)


On the right side of the "Pre-/per-operative data" section, there are:
 



- Buttons: Submit, Delete, Save
- Created by: SYSTEM ADMINISTRATOR (dropdown)
- Appt: (dropdown)
- Stage: Completed (dropdown)
- Additional diagnoses: (table with "Code" and "Name" columns, and an "Add/Remove" button)
- Audiometry: (text field) Go to: (button)
- Comments: (text area)
- Concurrent procedures: (table with "Code" and "Name" columns, and an "Add/Remove" button)

- **Select** – Displays a list of any previous sessions. Choose a surgery and click **OK** to display the information relating to that date.



- **New** – Select to create a new surgery. The **New Surgery** dialogue will open.
- **Delete** – Will remove the selected surgery and all related sessions from the database.
- **Close** – Will close the session without saving it.
- **Date of surg.** – Defaults to the current date, but can be adjusted to reflect the date of the operation either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date again.
- **Age** – Will show the client's age at the time of the surgery. If the client is less than 5 years old, the age will be displayed in years and months.
- **Op. side** – Left or right can be selected for the Operated side. This is a mandatory field.
- **Op. Number** – 1-12 or unknown can be selected manually.
- **Created by** – Will be the name of the logged in user.
- **Referral** – The relevant referral for the client can be attached to the form using the button. This may be a mandatory field depending on your settings.

*If the referral does not exist or an existing one cannot be used, you can create a 'quick' referral by clicking the **New** button from the  button to the right of the Referral field. See details in [Quick referral creation](#).*

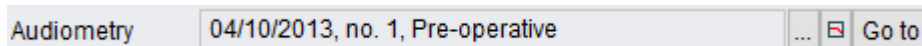
- **Surgeon** – Can be selected from the Referring Agents table using the button. The list will default to the **Surgeon** referring agent type. Click **New** to create yourself as a Surgeon if not already in the system. If another referring agent type is required by default, your System Administrator can set this up. If you as a user are linked in Administration to a Referring Agent, the Surgeon field will be pre-filled with your data.
- Other indications, such as **Hearing impairment**, **Tinnitus** and **Need to Swim** are displayed as check boxes on each surgery screen. There are two site configurable checkboxes available. Apply your own values to these from within System Administration.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays

detailed information about the session linking. The appointment will be linked automatically if the data entry takes place on the same day.

- **Stage** – The relevant treatment stage is displayed here.



### 24.1.1 Pre-/per Operative Assess

- **Pre-/per-operative data** – There are a number of hard coded drop-down lists which can be selected. These are not user definable, in order to produce consistent research data.
- **User field #1** and **User field #2** – These fields' labels and content can be defined by your System Administrator.
- **Delete** – This button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the **Delete** button at the top as described in the [OtoSurgery](#) topic.
- **Save** – To save the information on the selected tab for the current session.
- **Other indications** – These can be added by using the **Add/Remove** button. A user definable list of other indications is displayed. Check all that are appropriate and click **Select**. **Cancel** will close the dialogue box without adding any indications.
- **Audiometry** – Audiograms can be added to the session by selecting the button. This will give you a choice to **Attach** an audiogram, **Detach** an already attached audiogram or to **Show** an already attached audiogram. Clicking **Attach** will display the list of currently saved audiograms for the client. This list will include the ability to **Preview** a selected audiogram. The audiogram can be selected by double clicking or by highlighting and clicking **Select**. Once the audiogram has been attached, the details for it are displayed. The attached audiogram can be viewed by selecting the preview button.



- Click **Go to** to open the audiogram in the full Audiogram module.
- **Comments** – A free text box is available for comments.
- **Concurrent procedures** – These can be added by using the **Add/Remove** button. A user definable list of other procedures is displayed. Check all that are appropriate and click **Select**. **Cancel** will close the window without adding any indications.

### 24.1.2 Post-Operative follow up 2-5 m

- **General data** is displayed as described in the [OtoSurgery](#) topic.
- **Created by** – This will be the user that has created the information on this tab. Users can be selected from the drop-down list.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.
- **Stage** – The relevant treatment stage is displayed here.
- **Post-operative data 2-5 months** – Information from a number of drop-down lists can be selected here.

- **Date of event** – This will be the date of the 2-5 month review and is independent of the main date of surgery.
- **Delete** – This delete button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the **Delete** button as described in the [OtoSurgery](#) topic.
- **Save** – To save the information on the selected tab for the current session.
- **Audiometry** – Audiograms can be added to the session by selecting the button. This will give you a choice to **Attach** an audiogram, **Detach** an already attached audiogram or to **Show** an already attached audiogram. Clicking **Attach** will display the list of currently saved audiograms for the client. This list will include the ability to **Preview** a selected audiogram. The audiogram can be selected by double-clicking or by highlighting and clicking **Select**. Once the audiogram has been attached, the details for it are displayed. The attached audiogram can be viewed by selecting the **Preview** button.
- Press **Go to** to open the audiogram in the full Audiogram module.
- **Comments** – A free text box is available for comments.
- **Drop out** – This button will take you directly to the Drop out tab so that information can be added.

The screenshot shows a web application window titled "Surgery" with a close button (X) in the top right corner. The client information is "MR JOHN SMITH" and the surgery type is "OtoSurgery". There are buttons for "Select", "New", "Delete", and "Close". The interface has several tabs: "Pre-/per-Operative Assess", "Post-Operative follow up 2-5m", "Post-Operative follow up >12m", and "Drop-out". The "Post-Operative follow up >12m" tab is active.

**General data**

Date of surg. 10/04/2015    Age 5y    Op.Side Left    Op.Number 1    Per-operative diagnosis

Referral 10/04/2015, ++AUDIO REVIEW reass ...    Surgeon MRS ANNAN, 222 STR, HOME CITY    H72.9    Perforatio membrana tympani

Hearing impairment     Vertigo     Tinnitus     Cholesteatoma     Care  
 Need a HI     Discharge     Wish to swim     Checkbox 2

**Post-operative data 2-5 months**

Postoperative infection No    Date of event 11/04/2015    Submit    Delete    Save

Chorda function Normal/no change    Created by SYSTEM ADMINISTRATOR

Facial nerve function Normal    Appt    Stage Assessment

Anacusis New anacusis    Audiometry 11/04/2015, no. 1, Post-operative 2-5m    ...    Go to

Vertigo Preoperative level    Comments



Tinnitus Preoperative level

Otomicroscopy Intact, normal aeration

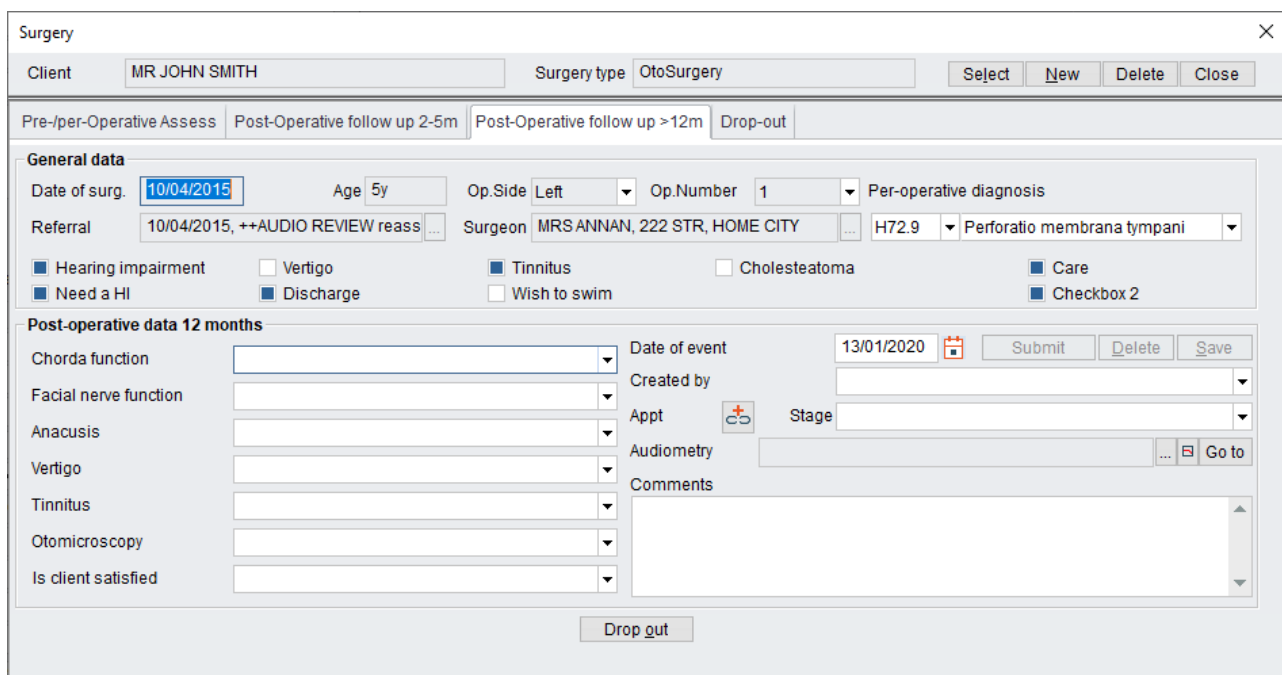
Drop out

### 24.1.3 Post-Operative follow up >12m

- **General data** is displayed as described in the [OtoSurgery](#) topic.
- **Created by** – This will be the user that has created the information on this tab. Users can be selected from the drop-down list.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either

attached (  ) or not attached (  ). In addition, the button has a tooltip that displays detailed information about the session linking.

- **Stage** – The relevant treatment stage is displayed here.
- **Post-operative data 12 months** – Information from a number of drop-down lists can be selected here.
- **Date of event** – This will be the date of the twelve month review and is independent of the main date of surgery.
- **Delete** – This button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the **Delete** button as described in the [OtoSurgery](#) topic.
- **Save** – To save the information on the selected tab for the current session.
- **Audiometry** – Audiograms can be added to the session by selecting the button. This will give you a choice to **Attach** an audiogram, **Detach** an already attached audiogram or to **Show** an already attached audiogram. Selecting Attach will display the list of currently saved audiograms for the client. This list will include the ability to Preview a selected audiogram. The audiogram can be selected by double clicking or by highlighting and Select. Once the audiogram has been attached, the details for it are displayed. The attached audiogram can be viewed by selecting the preview button
- To open the audiogram in the full Audiogram module, click **Go to**.
- **Comments** – A free text box is available for comments.
- **Drop out** – This button will take you directly to the **Drop out** tab so that information can be added.



The screenshot shows a 'Surgery' form window with the following details:

- Client:** MR JOHN SMITH
- Surgery type:** OtoSurgery
- Buttons:** Select, New, Delete, Close
- Follow-up tabs:** Pre-/per-Operative Assess, Post-Operative follow up 2-5m, Post-Operative follow up >12m, Drop-out
- General data:**
  - Date of surg.: 10/04/2015
  - Age: 5y
  - Op.Side: Left
  - Op.Number: 1
  - Per-operative diagnosis: H72.9
  - Referral: 10/04/2015, ++AUDIO REVIEW reass...
  - Surgeon: MRS ANNAN, 222 STR, HOME CITY
  - Perforatio membrana tympani
  - Checkboxes: Hearing impairment, Need a HI, Discharge, Tinnitus, Wish to swim, Cholesteatoma, Care, Checkbox 2
- Post-operative data 12 months:**
  - Chorda function, Facial nerve function, Anacusis, Vertigo, Tinnitus, Otomicroscopy, Is client satisfied (all dropdown menus)
  - Date of event: 13/01/2020
  - Created by, Appt, Stage (dropdowns)
  - Audiometry button with tooltip icon and 'Go to' button
  - Comments text area
  - Drop\_out button

## 24.2 Stapes Surgery

There are a number of tabs along the top of the page showing different information.

**General data** will display the same information on each tab. Once a surgery session has been saved, this information is displayed but greyed out on all but the first tab. To save a Stapes Surgery, the minimum data required is **Op. side**. If **Referral** has been made mandatory, this will need to be saved as well.


The screenshot shows a 'Surgery' form with the following details:



- Client:** MRS FIRSTNAME106 LASTNAME106
- Surgery type:** StapesSurgery
- Buttons:** Select, New, Delete, Close
- Follow-up tabs:** Pre-/per-Operative Assess, Post-Operative follow up 2-5m, Post-Operative follow up >12m, Drop-out
- General data:**
  - Date of surg.: 09/10/2013
  - Age: 24y
  - Op.Side: Right
  - Op.Number: 1
  - Per-operative diagnosis: Otosclerosis
  - Referral: 07/12/2018, ++FITTING - from previot...
  - Surgeon: MISS SE CHALSTREY, CONSULTANT EN...
  - H80.9
  - Family members with Otosclerosis:
  - Checkboxes: Hearing impairment, HI on operated ear, Vertigo, Tinnitus, Aid, Checkbox 2
- Pre-/per-operative data:**
  - Anaesthetic: General anaesthesia
  - Access: Trans canal
  - Procedure: DDA00 - Stapedotomy
  - Type of laser: Diode
  - Drill: Skeeter
  - Prosthesis: Nitinol-Smart
  - Batch: [ ] Lot: [ ]
  - Piston diameter: 0.4
  - Piston length: [ ]
  - Facial nerve: Normal
  - Niche dressing: Gelfoam
  - Ear canal dressing: Gelfoam + HT-meche
  - Field1: 1
  - Field2: 3
- Additional information:**
  - Created by: full name tests???
  - Appt: [ ] Stage: Treatment
  - Additional diagnoses: test diagnoses
  - Audiometry: 04/10/2013, no. 1, Pre-operative
  - Comments: test comments
  - Concurrent procedures table:
 

Code	Name
DBA00	exc probat meatus ac ext

- **Select** – Displays a list of any previous sessions. Choose a surgery and click **OK** to display the information relating to that date.
- **New** – Select to create a new surgery.
- **Delete** – Will remove the selected surgery and all related sessions from the database.
- **Close** – Will close the session without saving it.
- **Date of surg.** – Defaults to the current date, but can be adjusted to reflect the date of the session either by entering the date manually or by clicking on the calendar icon to choose a date from a calendar float-window. Double-click in the field to enter today's date.
- **Age** – Will show the client's age at the time of the surgery. If the client is less than 5 years old, the age will be displayed in years and months.
- **Op. side** – Left or right can be selected. This is a mandatory field.
- **Op. Number** – 1-12 or unknown can be selected.



- **Created by** – Will be the name of the logged in user.
- **Referral** – The relevant referral for the client can be attached to the form using the button. This is may be a mandatory field depending on your settings.

If the referral does not exist or an existing one cannot be used, you can create a ‘quick’ referral by clicking the **New** button from the  button to the right of the Referral field. See details in [Quick referral creation](#).

- **Surgeon** – Can be selected from the Referring Agents table using the button. The list will default to the **Surgeon** referring agent type. If another referring agent type is required by default, your System Administrator can set this up. If you as a user are linked in Administration to a Surgeon Referring Agent, the **Surgeon** field will be pre-filled with your name.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.
- **Stage** – The relevant treatment stage is displayed here.



### 24.2.1 Pre-/per Operative Assess

- **Pre-/per-operative data** – There are a number of hard-coded drop-down lists which can be selected. These are not user definable to assist in research.
- **User field #1** and **User field #2** – These fields can be defined by your System Administrator.
- **Delete** – This button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the Delete button as described in the [Stapes Surgery](#) topic.
- **Save** – To save the information on the selected tab for the current session.
- **Other indications** – These can be added by using the **Add/Remove** button. A user definable list of other indications is displayed. Check all that are appropriate and click **Select**. **Cancel** will close the window without adding any indications.
- **Audiometry** – Audiograms can be added to the session by selecting the button. This will give you a choice to **Attach** an audiogram, **Detach** an already attached audiogram or to Show an already attached audiogram. Clicking **Attach** will display the list of currently saved audiograms for the client. This list will include the ability to **Preview** a selected audiogram. The audiogram can be selected by double-clicking or by highlighting and clicking **Select**. Once the audiogram has been attached, the details for it are displayed. The attached audiogram can be viewed by selecting the preview button.

Audiometry    Go to

- Click **Go to** to open the audiogram in the full Audiogram module.
- **Comments** – A free text box is available for comments.
- **Concurrent procedures** - These can be added by using the **Add/Remove** button. A user definable list of other procedures is displayed. Check all that are appropriate and click **Select**. **Cancel** will close the window without adding any indications.

### 24.2.2 Post-Operative follow up 2-5 m

- **General data** is displayed as described in the [Stapes Surgery](#) topic.
- **Created by** – This will be the user that has created the information on this tab. Users can be selected from the drop-down list.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.
- **Stage** – The relevant treatment stage is displayed here.
- **Post-operative data 2-5 months** – Information from a number of drop-down lists can be selected here.
- **Date of event** – This will be the date of the 2-5 month review and is independent of the main date of surgery.
- **Delete** – This button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the **Delete** button as described in the [Stapes Surgery](#) topic.
- **Save** – To save the information on the selected tab for the current session.
- **Audiometry** – Audiograms can be added to the session by selecting the button. This will give you a choice to **Attach** an audiogram, **Detach** an already attached audiogram or to **Show** an already attached audiogram. Clicking **Attach** will display the list of currently saved audiograms for the client. This list will include the ability to **Preview** a selected audiogram. The audiogram can be selected by double-clicking or by highlighting and clicking **Select**. Once the audiogram has been attached, the details for it are displayed. The attached audiogram can be viewed by selecting the preview button.
- Click **Go to** to open the audiogram in the full Audiogram module.
- **Comments** – A free text box is available for comments.
- **Drop out** – This button will take you directly to the Drop out tab so that information can be added.

Surgery ×

Client  Surgery type  Select New Delete Close

Pre-/per-Operative Assess  Post-Operative follow up 2-5m  Post-Operative follow up >12m  Drop-out

**General data**

Date of surg.  Age  Op.Side  Op.Number  Per-operative diagnosis

Referral  Surgeon  H80.9  Otosclerosis

Hearing impairment  Vertigo  Tinnitus  Aid

HI on operated ear  Family members with Otosclerosis   Checkbox 2

**Post-operative data 2-5 months**

Postoperative infection  Date of event

Chorda function  Created by

Facial nerve function  Appt   Stage



Anacusis  Audiometry

Vertigo  Comments

Tinnitus

Otomicroscopy

### 24.2.3 Post-Operative follow up >12m

- **General data** is displayed as described in the [Stapes Surgery](#) topic.
- **Created by** – This will be the user that has created the information on this tab. Users can be selected from the drop-down list.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.
- **Stage** – The relevant treatment stage is displayed here.
- **Post-operative data 12 months** – Information from a number of drop-down lists can be selected here.
- **Date of event** – This will be the date of the twelve month review and is independent of the main date of surgery.
- **Delete** – This button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the Delete button as described in the [Stapes Surgery](#) topic.
- **Save** – To save the information on the selected tab for the current session.
- **Audiometry** – Audiograms can be added to the session by selecting the button. This will give you a choice to **Attach** an audiogram, **Detach** an already attached audiogram or to **Show** an already attached audiogram. Clicking **Attach** will display the list of currently saved audiograms for the client. This list will include the ability to **Preview** a selected audiogram. The audiogram can be selected by double-clicking or by highlighting and clicking **Select**. Once the audiogram has been attached, the details for it are displayed. The attached audiogram can be viewed by selecting the preview button.

Surgery
×

Client 
Surgery type

Pre-/per-Operative Assess
Post-Operative follow up 2-5m
Post-Operative follow up >12m
Drop-out

**General data**

Date of surg.

Age

Op.Side

Op.Number

Per-operative diagnosis

Referral 
 Surgeon 
 H80.9

Hearing impairment  
 HI on operated ear

Vertigo

Tinnitus  
 Family members with Otosclerosis

Aid  
 Checkbox 2

**Post-operative data 12 months**

Chorda function   
 Facial nerve function   
 Vertigo   
 Tinnitus   
 Otomicroscopy   
 Is client satisfied

Date of event

Created by

Appt  
 Stage



Audiometry

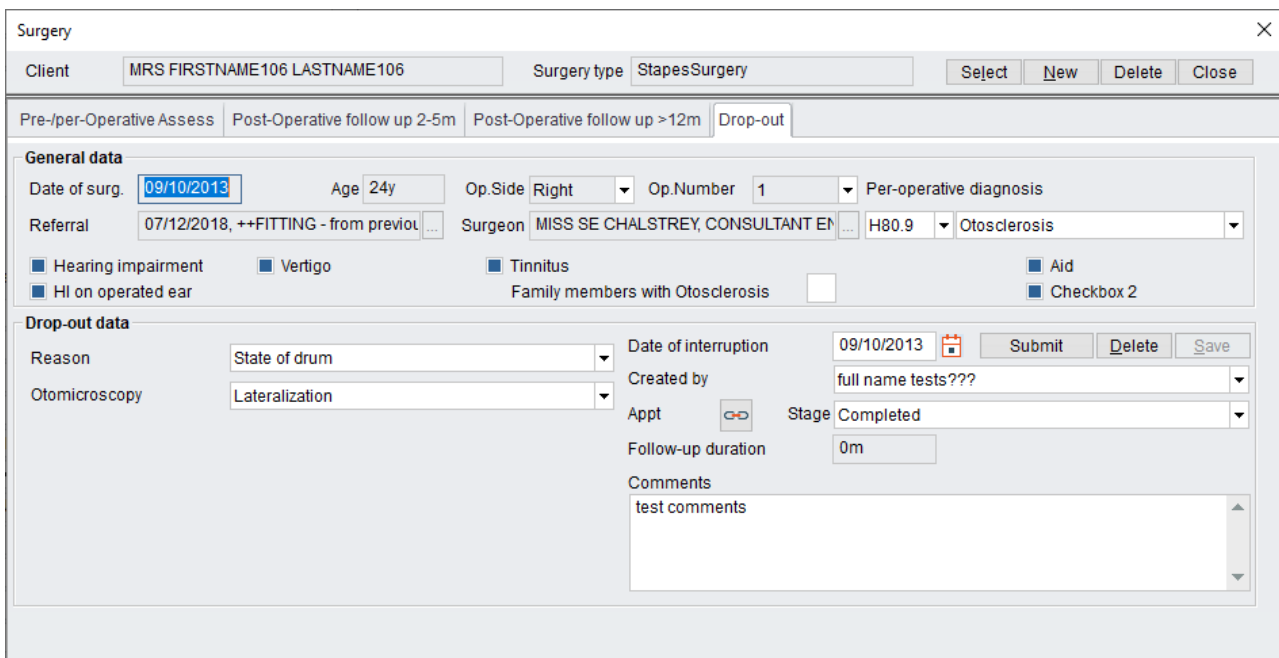
Comments

- Click **Go to** to open the audiogram in the full Audiogram module.
- **Comments** – A free text box is available for comments.
- **Drop out** – This button will take you directly to the **Drop out** tab so that information can be added.


## 24.3 Surgery Drop out

A client **Drop out** can be opened from the tab of the Surgery window or with the button of that name on the two follow up screens.

- **General data** is displayed as described in the [OtoSurgery](#) and [StapesSurgery](#) topics, correspondingly.
- **Created by** – This will be the user that has created the information on this tab. Users can be selected from the drop-down list.
- A special button is available for attaching the session to or detaching it from an appointment. The button has a picture which reflects the state of the session: either attached () or not attached (). In addition, the button has a tooltip that displays detailed information about the session linking.
- **Stage** – The relevant treatment stage is displayed here.
- **Drop-out data** – A **Reason** for the drop-out can be chosen. If the selected **Reason** is **State of drum**, then the field **Otomicroscopy** is activated and items can be selected.
- **Date of interruption** – This can be added in the same way as other dates. Once a date has been added, the **Follow-up duration** is displayed in months and days.
- **Delete** – This button will only remove the details on the current session. It does not remove the entire surgery. To do that, use the **Delete** button as described in the [OtoSurgery](#) and [StapesSurgery](#) topics, correspondingly.
- **Save** – To save the information on the selected tab for the current session.
- **Comments** – A free text box is available for comments.

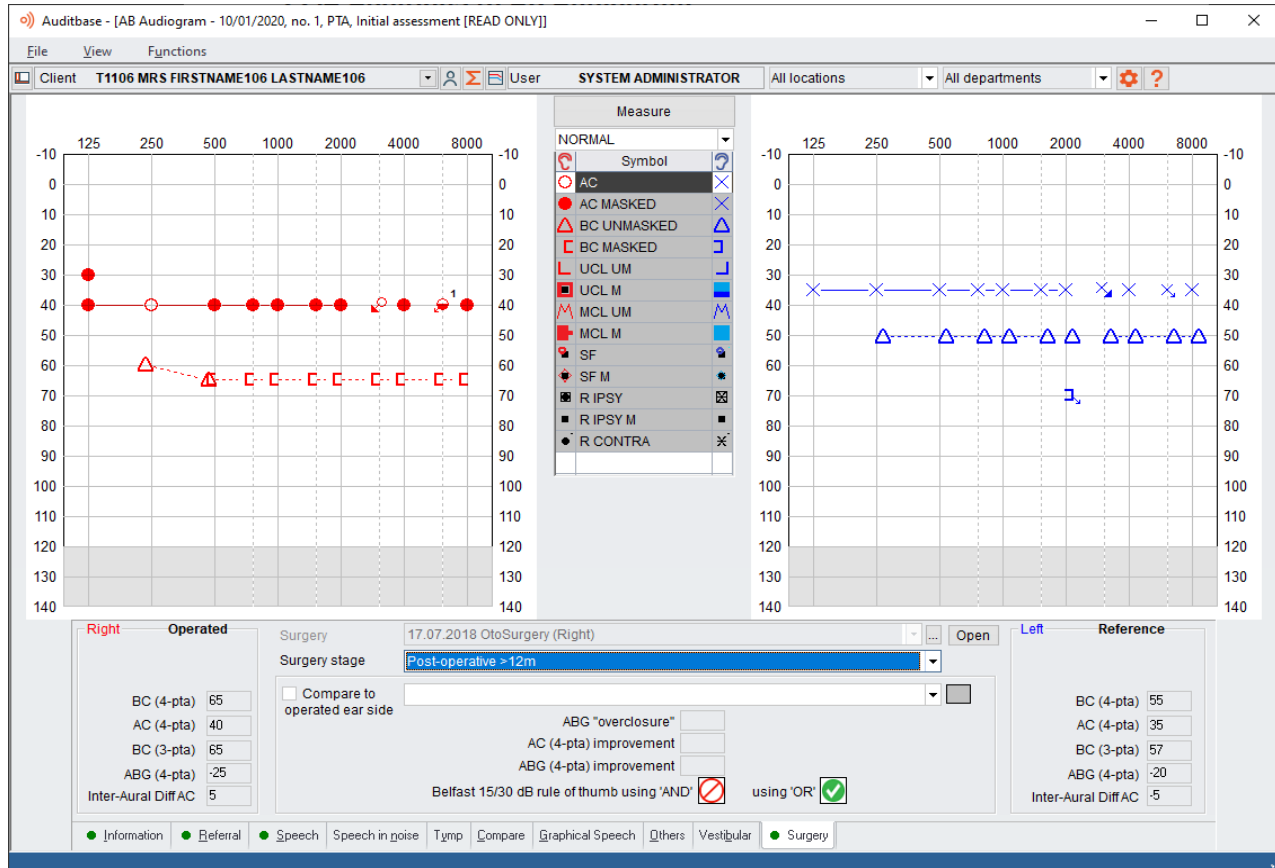


The screenshot shows a software window titled "Surgery" with a close button (X) in the top right corner. The window is divided into several sections:

- Client Information:** Client name "MRS FIRSTNAME106 LASTNAME106", Surgery type "StapesSurgery", and buttons for "Select", "New", "Delete", and "Close".
- Follow-up Tabs:** "Pre-/per-Operative Assess", "Post-Operative follow up 2-5m", "Post-Operative follow up >12m", and "Drop-out" (selected).
- General data:**
  - Date of surg.: 09/10/2013
  - Age: 24y
  - Op.Side: Right
  - Op.Number: 1
  - Per-operative diagnosis: (empty)
  - Referral: 07/12/2018, ++FITTING - from previous
  - Surgeon: MISS SE CHALSTREY, CONSULTANT ENT
  - H80.9
  - Otosclerosis
  - Checkboxes: Hearing impairment, HI on operated ear, Vertigo, Tinnitus, Family members with Otosclerosis, Aid, Checkbox 2.
- Drop-out data:**
  - Reason: State of drum
  - Otomicroscopy: Lateralization
  - Date of interruption: 09/10/2013
  - Created by: full name tests???
  - Appt: 
  - Stage: Completed
  - Follow-up duration: 0m
  - Comments: test comments

## 24.4 Additions to AB Audiogram

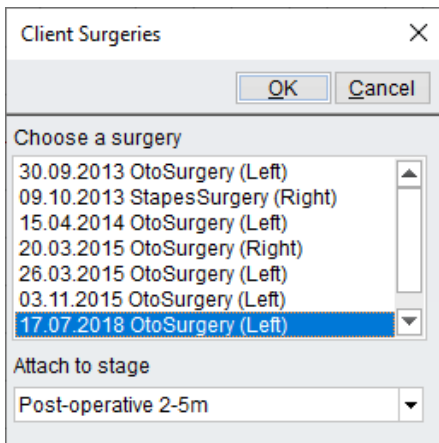
If the Surgery module has been added as an option, an additional tab is activated in **Measurements** → **AB Audiogram**. This tab is called **Surgery** and shows additional data for a selected audiogram.



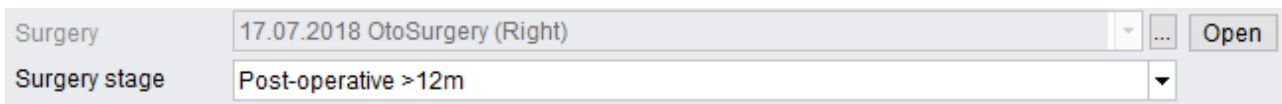
Linking audiograms to surgeries can be performed in either direction. Audiograms can be linked to surgeries or surgeries can be linked to audiograms. To link an audiogram to a surgery, see above sections.

An audiogram can only be attached to one stage in any surgery but to more than one surgery. An audiogram cannot be attached to a stage date earlier than one that is attached to a later stage date for the same surgery.

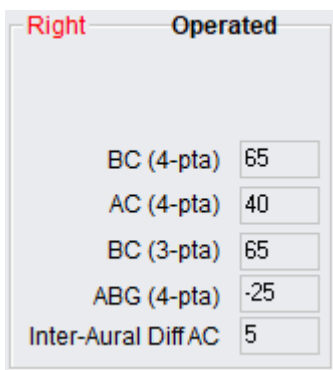
- To link a surgery to an audiogram, select the button at the end of the **Surgery** field. Select **Attach** and a list of the client's available surgeries will be displayed.



- Double-click or highlight the appropriate surgery and click **OK**. **Cancel** will close the window without selecting a surgery.



- The surgery is now linked to the audiogram and the information will be displayed including **Surgery stage**.
- The surgery can be viewed by clicking the **Open** button.
- 4 point mean values for AC, BC and Air-Bone Gap (ABG) are displayed. These means are set for US research publication purposes.



- If 3 kHz is not plotted, the user will get a warning by the relevant box flashing in an appropriate colour, i.e. red for right and blue for left. The mean will then be calculated using 4 kHz instead. If this is the case, a tooltip will be displayed.
- A flag is stored in the database for the audiogram if this warning is required. This flag is for reporting purposes only and cannot be seen by the user.
- By checking **Compare to operated ear side**, a previous audiogram can be selected. This will populate further fields regarding the operated side.

Compare to operated ear side

25/12/2015, 3

ABG "overclosure"

AC (4-pta) improvement 8

ABG (4-pta) improvement

Belfast 15/30 dB rule of thumb using 'AND'  using 'OR'

- An icon will be displayed to show whether the compared audiograms meet the **Belfast 15/30 dB rule of thumb**. The Belfast rule is calculated according to two interpretations of the rule. One with 'AND' where the interaural difference must be less than 15dB and the hearing loss in the ear is under 30dB and the other with 'OR' where either of these conditions can be met.
- The colour of the audiogram that is being compared can be changed by selecting the coloured square to the right of the compare field. A colour palette opens and the new colour can be selected.
- If more than two audiograms need to be compared then the **Compare** tab on **AB Audiogram** should be used. The current selections will be shared between the two tabs.

## 24.5 Other Additions

### 24.5.1 Reports

Crystal and CSV reports have been added to **Navigation → User reports → Surgery → Crystal Reports** tab or **CSV reporting** tab. These are run in the same way as other Crystal and CSV reports.

### 24.5.2 Client pathway overview

The following actions have been added to client pathway overview settings in the System Administration tool. All except **Surgery Drop out** can be added as planned actions.

- OtoSurgery Pre-Op
- OtoSurgery PostOp 2-5m
- OtoSurgery PostOp > 12m
- StapesSurgery Pre-op
- StapesSurgery PostOp 2-5m
- StapesSurgery PostOp > 12m
- Surgery Drop out.

Icons have been added to the Client Pathway Overview for these surgery actions. The relevant surgery screen can be viewed by selecting it from the overview. They will be under the appropriate referral if this has been set by your System Administrator.

## 25 Laptop Synchronization

If laptop synchronization has been purchased, Auditdata IT Support staff will set up a laptop to allow parts of Auditbase to be used without a network connection. If this has been set up, you must connect your laptop to a network point and create the database you will be using without your network connection. This is the 'off line-database' and is usually called ABASEOFF.

*It is not possible to transfer clients who have a Noah action on the date you are creating the offline database.*

## 25.1 Creating the offline database

- Log in to the online database as a normal user.
- **System settings** -> **Prepare offline database**.
- Make sure that you have selected the correct name of the database you want to create in the **Offline database drop-down** list, usually ABASEOFF.
- Click **Next**.
- Click **OK** to overwrite the existing database. Note that the laptop database must be synchronised in advance with the main system to recreate the same database. If this has not been done an error message will be displayed.
- When the database structure has been created you can choose clients to add to the database in one of the following ways:
  - **Add Client** allows you to use the **Search Client** function and add individual clients by highlighting them and clicking on **Select**.
  - **Add Clients from waiting list** allows you to add all the clients from a waiting list to the offline database by choosing the waiting list from the drop-down list.
  - **Add clients from a resource** allows you to select the clients who already have appointments booked in the diary. Choose the name of the resource from the drop-down list and fill in the date range required. The date range needs to specify the date before and the date after those required, for instance for 3rd April 2005 choose 02/04/2005 to 04/04/2005.
- When all the required clients are selected, click **Next**.
- When the wizard is complete, click **Finish**. The database is now ready to use offline.

*It is important that the network connection is not unplugged during this procedure.*

Prepare for off-line work

Code	Name
T1104	MR FIRSTNAME104 LASTNAME104
T1105	MRS FIRSTNAME105 LASTNAME105
T1106	MRS FIRSTNAME106 LASTNAME106
T1107	MRS FIRSTNAME107 LASTNAME107

Click to sort column

Currently 4 clients are selected

## 25.2 Appointment symbols in the offline database

To minimize the time it takes to prepare an offline database not all appointments are visible on the laptop.

- If the selection of clients for creating the offline database was made based on Resources then all the appointments and reservations in the period selected will have their symbols copied to the booking screen on the offline laptop.
- If the selection of clients for creating the offline database was based on client names or via a Waiting List then only the appointments for the forthcoming 30 days will have a symbol on the booking screen. No other reservations or group appointments will be copied.
- All the appointments belonging to a client, that have taken place in the past or are booked for the future, will be copied to the laptop, but apart from the ones above the symbols will not be visible on the booking screen.

## 25.3 Logging in to the offline database

- Double-click on the Auditbase icon on your desktop.
- Change the database name in the drop-down list to the name of your offline database, usually ABASEOFF.
- Logging in
  1. **Logging in with a Microsoft Windows account**
    - The login name will be preselected. No need to enter a password.
  2. **Logging in with an Auditbase account**
    - Type your normal username and password.
- You can now use the areas of the database which are accessible offline in the normal way.
- Creation of documents and templates is allowed. Editing of either offline is not supported. To work around this, make a copy of an existing document when offline and edit that.

## 25.4 Synchronization

When a user has connected to the offline database, for instance during a house visit, changes in the laptop (local database) must be synchronized with the central database when back at the clinic.

- Connect the laptop to a network point.
- Log onto the normal Auditbase database, usually the database name is ABASE.
- **System settings -> Laptop synchronization.**
- Follow the onscreen wizard instructions ensuring that the right name appears in the database name field, usually ABASEOFF.

*It is important that the network connection is not unplugged during this procedure.*

- The synchronization wizard activates a search for the name of the offline database. If not found, the user is asked to select from a list.
- A search on the client ID(s) from the offline database is performed in the central database. If a client with the same ID exists in the central database, the client data is transferred without prompting the user.
- If no identical client ID is found in the central database, the user is asked whether the client should be inserted as new or merged with an existing client in the central database.
- If the replication log table holds a record of a new client registration, the merge client dialog will appear.
- To process client data from offline database, one of three solutions must be selected:
  - import as new
  - merge with existing client data
  - skip client –all data related to this client is skipped and cannot be retrieved
- By using a subset of client data from the offline database, the user can locate the right client in the central database by searching on for instance:
  - client ID
  - name(s)
  - birth date
  - address
- Entering one or some of the criteria and pressing Search opens the Client search dialog with results matching those criteria.
- Not entering any criteria but pressing Search still opens the search dialog for a user to search for a client in the usual way.
- After processing all new and changed client information, other changes are copied to the offline database by the system. The user is informed that the offline database is no longer available but needs to be reinitialized prior to further use.
- In the offline laptop database, clinical actions will not be linked automatically to appointments and cannot be linked manually. Appointments from the offline database are not synchronised back to the main database so linking cannot be updated. To link actions on the offline laptop to appointments use the Attach feature after the database has been synchronised and the actions are in the main database. Noah actions however can be linked automatically to the appointment when the database is synched back to

the main database. If the patient has more than one appointment on the same day then the action will be linked to the latest appointment.

## 25.5 Merging new clients created when you were offline

If new clients were created in the offline database you can merge them into existing records or create them as new records in the main database during laptop synchronisation.

A window box named **A new client is found in the offline database** appears during the laptop synchronisation wizard.

The left-hand side of the window fields are filled with the new client data and the user should select which criteria to search on by pressing the arrow(s) > copying the field value(s) to the right-hand side and pressing **Search**.

Clients matching the criteria are listed to **Select** from filling in the information in the right-hand side fields.

Having the data of the clients to be merged respectively on the left and right-hand side, pressing **Merge** will log all data on the 'two' clients into a log table in the database.

Client data as first name, surname and address of client in the offline database are ignored as this data is retrieved via a PAS link connection and updated from there.

If the user decides not to merge the two clients, pressing **Load as new** will save the client from the offline database as a new, separate client.

If the user decides to leave the client from the offline database out of the central database, pressing **Skip** will perform this action.

Continue the synchronisation wizard in the usual way.

## 26 PPP and Import/Export

Auditbase contains an import/export facility to enable the transfer of patient data between databases.

With the PPP module, you can export a selected number of clients from a Public Partner, put the client data on a CD and send it to a Private dispensing company who will consult the client and fit them with a hearing instrument. Having done so, the Private Partner will refer the client back to the Public Partner with the revised client data.

All PPP transfers have to be approved by the client.

The module is also referred to as **PPP list**.

General workflow of the PPP module goes in 5 stages:

- Export of client data from Public Partner (data retrieved from Auditbase System e.g. at hearing clinic).
- Import of client data at Private Partner (data imported to local Auditbase System e.g. at hearing instrument dispenser A).
- Intermediate work with client data at Private Partner's (e.g. client visiting hearing instrument dispenser A and being granted a hearing instrument).
- Export of revised client data from Private Partner (revised data retrieved from local Auditbase System e.g. at hearing instrument dispenser A).
- Import of revised client data to Public Partner (revised data is merged into respective client records in central Auditbase System e.g. at hearing clinic).

The most likely flow is looking up a Waiting list and selecting one or more clients to be referred to the private partner.

## 26.1 Definitions

The following definitions are used throughout this document.

- **External site** – this is the site to which you are sending the database. It could be a PPP partner, education or another hospital.
- **External partner** – essentially the same as an external site also known as a private partner.
- **Configuration file** – this is a special type of file which is used to set up the import/export facility.
- **Journal mapping** – this is where you decide what a journal string is called. Rarely do two databases have the same names for journal strings so you need to associate what you call your string with what the external site calls theirs.
- **PPP** – Public Private Partnership.

## 26.2 Setting up

The following will assist you to set up and use this facility. The setting up needs to be performed in the Auditbase Administration tool, which is opened from Auditbase by going to **System settings** -> **Open system administration**. Once opened, select **Import/Export**.

### 26.2.1 Import Configuration

Setting up the import configuration will define which fields are imported into the database. There are two default configurations. **Default** has all options selected. **Default** demographics only has client demographic information only. A new configuration can be made by selecting **New**. The **Name** of the new configuration should be entered in the field provided. There are then 3 tabs which also need to be selected.

- **Client** – The client demographics can be selected for import.
- **Update demographics for existing clients** – If this option is selected, then the client's demographic details will be automatically over written when data is imported. When you, at the public partner, import a PPP file from a private partner, data will never be updated, but when differences shown in a log file after the import is completed.
- **Selection of client data to import** – Here information from the **Clientinformation** module can be selected for import. To select all demographics select **All**.
- **Journal** - Journal data will be imported if this option is selected. Note that only mapped journal strings are imported.
- **Other** – There are a number of check boxes that can be used to select which information is created or updated when the data is imported. Check the required options or **All** for everyone.

Once the options have been selected, **Save** will store the configuration. To remove a configuration, select **Delete**.

*Note: When importing a PPP file at a private partner, you will not be able to select a specific import configuration; all data for the client will automatically be created/updated when imported.*

### 26.2.2 Export Configuration

Setting up the export configuration will define which fields are exported from the database. There are two default configurations. **Default** has all options selected. **Default** demographics only has client demographic information only. A new configuration can be made by selecting **New**. The **Name** of the new configuration should be entered in the field provided. There are then 3 tabs which also need to be selected.

- **Client** – The client demographics can be selected for export.
- **Journal** – Here, choices are made as to how much of the journal is to be exported.
- **Enable export of journal data** – If this option is selected, the journal search strings can be chosen to export data.

- **Export data for all search strings** – When this option is selected, all search strings from both Audiologist and Hearing therapist journal are exported. Also search strings to be created in future will be included in an export.
- The alternative is to configure exactly which search strings those are to be exported. There are a number of check boxes that can be used to define this. Check the required options or **All** for everyone.
- **Other** – There are a number of check boxes that can be used to select which information is exported. Check the required options or **All** for everyone.

Once the options have been selected, **Save** will store the configuration. To remove a configuration, select **Delete**.

*Note: When exporting a PPP file from a private partner, you will not be able to select a specific export configuration; all data for the client will automatically be exported.*

### 26.2.3 External site set up

- Once a configuration file has been sent to an external site, the file can be used to set up that external partner.
- The site name will be produced by the imported configuration file and cannot be adjusted manually.
- The **Default configuration** can be set for both importing and exporting. The required configuration is selected from the drop-down menu.
- The search strings in the journal must be mapped so that the search strings from the external database match those for the main database.
- Selecting **Journal mappings** will open a window called **Map search strings for journal**. Search strings for the audiologist or hearing therapist can be selected using the **Select type of journal search string to map** drop down menu.
- The journal entries for the **Source site** are shown in the left window, the **Target search strings** are shown on the right. Select a search string from the source site by clicking on it.
- Select a **Target search string** and **Map**. The **Current mappings** are displayed at the bottom of the window.
- To remove a map, select from this window and **Delete** map. Note that unmapped search strings will not be imported.

### 26.2.4 Exchange set up

- This is where the exchange configuration files are imported and exported. A partnership cannot be set up until these files have been exchanged.
- To export a configuration file, it has to be decided if the file will be password protected or locked for a single site. A site locked configuration file can only be made for already known sites.
- Choose either **Password protect file** or **Lock for site** and then select the site from the drop-down list. If no site is in the drop-down list, a file will have to be imported first.

- To export this file, select **Export** and decided where the file should be saved. This file can then be saved to disk or emailed to the appropriate partner.
- To import a file from a partner, select **Import** and open the file from wherever it has been saved to. You will be asked to confirm the password that the partner will have sent you and the configuration will be imported. At this point you will be asked if you wish to map journal search strings in the same way as for the external site set up above.
- The **Exchange identification code** is used to identify a client when exchanging between Auditbase databases. This can either be the NHS or Case note number. It is possible to allow export without identification number, but this is mandatory for the PPP project. Partners in the NHS project must use the NHS number as exchange identification code when exchanging client information.

### 26.2.5 PPP specific set up

This feature is only available if you have a license to the PPP module. There are 3 **Site definable settings** check boxes.

- **Warn before creation of sessions if PPP exchange is not approved by client** – A warning will appear when adding a client to PPP list if the client has not given approval to join the PPP.
- **Block for export of clients without approved PPP exchange** –
- **Display warning when client with open session is selected** – A warning is given each time a client is selected that has an open PPP session.

Once the options have been selected, **Save** will store the information.

It is possible to add status labels for two of the system statuses, **In process** and **Returned**. Status labels can be added by selecting the **New** button. The label name is then added in the **Status** label field. **Save** will store the information and **Delete** will remove a **Status label** from the database.

### 26.2.6 Session filter set up

This feature is only available if you have a license to the PPP module.

- The session filter can be set up so that the PPP list can be viewed any way that the user wants. A new filter can be created by clicking the **New** button. **Visible columns** can be selected by checking or un-checking the boxes. **Conditions** can also be added by selecting from the **Status**, **Public partner** or **Private partner** drop down menus and clicking the **Add** buttons.
- The order that columns appear in the PPP list can be changed by selecting a column and then moving it up or down using the arrows. Once the filter has been set up, **Save** will store the information.
- The order of filters in the drop-down list in PPP list can be changed by selecting a filter, and then moving it up or down using the arrows. The filter on top will be the default filter used when the PPP list is opened.

## 26.3 Additions to modules

### 26.3.1 Client Information

The Client Information module now has an additional tab called **PPP** (only available with license to PPP module). This tab contains information on the client's PPP session status. If the client gives permission for them to be added to the PPP list, the **Approval** field should be checked.

The **Sessions** drop down list shows all the instances that this client has of PPP sessions.

### 26.3.2 Waiting List

Once a client has been selected, **Export** and **Move to PPP** become active. The client is selected by checking the box on the left-hand side of the waiting list. All clients on the waiting list can be selected by checking the **Select all** field. The number of clients selected is displayed below this field. These selected clients can now either be moved to the PPP export list or exported directly.

- **Move to PPP** – When this option is selected, a **PPP session properties** window is displayed. The client's name and NHS number are displayed as well as their approval status. If the **PPP approval given** box is un-checked, it must be determined if this client has given approval to be sent to a PPP dispenser. This field must be checked in order for the patient to be exported. The **Session status** will default to new as this client is being moved from a waiting list. The **Session setup** will determine which external site the client is being sent to. Choose the **Private partner** from the drop-down list. The **Referral status** can be selected from another drop-down list. This will indicate the referral route. If the client is being transferred by paper only then the box should be checked. Once the choices have been made, **Save** will transfer the details from the waiting list to the PPP list.
- **Export** – When this option is selected, an **Export data** window is displayed. Clients can be added to the export by using the **Search** button. **Remove** will take the selected client off the list for export. The export file can either than be password protected or locked for the particular external site. The **Export configuration** has to be selected from the drop-down list. This operation can be cancelled using the **Cancel** button. Once **Export** has been selected, you must **Enter password for encryption** and then re-enter to confirm. Once **Ok** has been chosen, the **Saveexport file** window opens and the path where to save the file can be chosen. Auditbase automatically names the file, but this can be re-named providing the file extension remains .agi. Once **Save** is selected, a progress bar appears. Once the export is complete, the **Export status log** can be viewed or printed. The text can be copied and pasted into another application such as Word. The export log can be saved as a text file by selecting **Save as**. **Close** will complete the export. The client's details will remain on the waiting list.

## 26.4 PPP list

The PPP list is open from **Navigation -> PPP list**.

## 26.5 Exporting from the PPP list

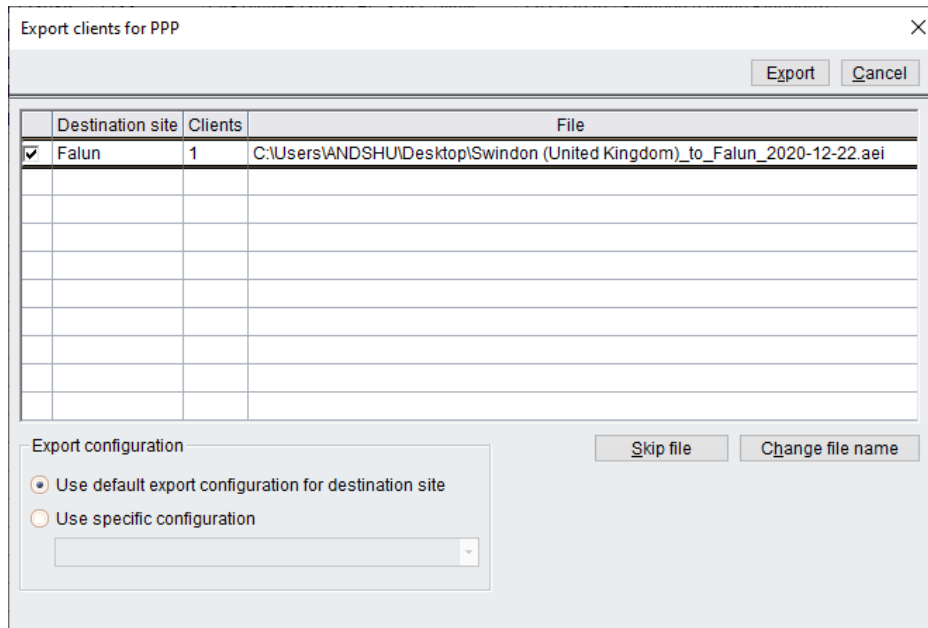
The PPP list is opened from Modules -> PPP list.

- The session information can be displayed using the drop-down list titled **Filter**. These filters are set up by the System Administrator. Clients for export must be selected by checking the box to the left-hand side of the client's details.
- Next to this box is a flag, this will be green if the client is ready for export. Red flag shows that there are details missing for the export. All the clients can be selected by using the **Select all** check box. The number of rows selected will be displayed. Once at least one client has been selected, the **Properties** and **Export** buttons become active.
- **Properties** will display the **PPP session properties** window where changes can be made to ensure the client is ready for export. The client's name and NHS number are displayed as well as their approval status. If the **PPP approval given** box is un-checked, it must be determined if this client has given approval to be sent to a PPP dispenser. This field must be checked in order for the patient to be exported.

Date and time	Status/action	Site	Us
13/03/2019	Exported	Swindon (United Kingdom)	Yuliia M
13/03/2019	Exported (full)	Swindon (United Kingdom)	Yuliia M
13/03/2019	New	Swindon (United Kingdom)	Yuliia M

- The selected client's import/export **History** can be shown. The **Session status** can be changed to show that the client has been exported. The **Session setup** will determine which external site the client is being sent to. Choose the **Private partner** from the drop-down list. The **Referral status** can be selected from another drop-down list. This will indicate the referral route. If the client is being transferred by paper only then the box should be checked.
- Once all clients are ready, the **Export** button should be selected, which will display the **Export clients for PPP** window. This will show the **Destination site**, number of **Clients** and the export **File** name. The **Export configuration** can be chosen, either the default one

or a particular configuration depending on the external site to which this data is being exported. The file name can be changed by selecting the **Change file name** button. The export can be cancelled or a file skipped by selecting the appropriate buttons.



- Once the **Export** button is selected, a progress bar appears and then a window telling you how many clients were successfully exported.

## 26.6 Importing to the PPP list

Once a file has been sent to you, it must be imported to be read. Once the **PPP list** is opened, select the **Import** button and a **Client import for PPP** window is displayed. Use the browse button to find the correct file and then **Import**. The import file must now be found using the browse button.

Client import for PPP

Import Cancel

Folder C:\Users\landshu\OneDrive - AuditdataAD\Desktop\

File

File information

Exporting site

User

Date/Time

Number of clients in file

Collect all new and matched clients in a List

List for new patients

Referral list #1

List for merged patients

Test Referral list

Import configuration

CSV file

Generate CSV file with client demographics

Output file

Once the file has been found and opened, the details are displayed, including **Exporting site**, **User**, **Date/time** and **Number of clients in the file**.

Client import for PPP

Import Cancel

Folder C:\Users\landshu\Downloads\

File Patient\_DaveAnonymised\_Test.aei

File information

Exporting site Trafford General Hospital Adult

User SYSTEM ADMINISTRATOR

Date/Time 26/09/2022 17:32:38

Number of clients in file 1

Collect all new and matched clients in a List

List for new patients

Referral list #1

List for merged patients

Test Referral list

Import configuration

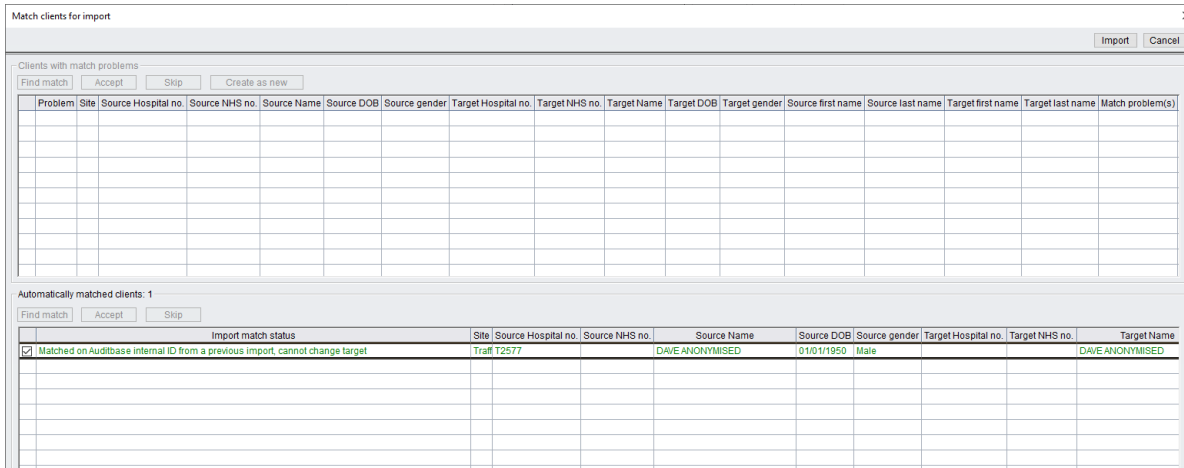
<Default>

CSV file

Generate CSV file with client demographics

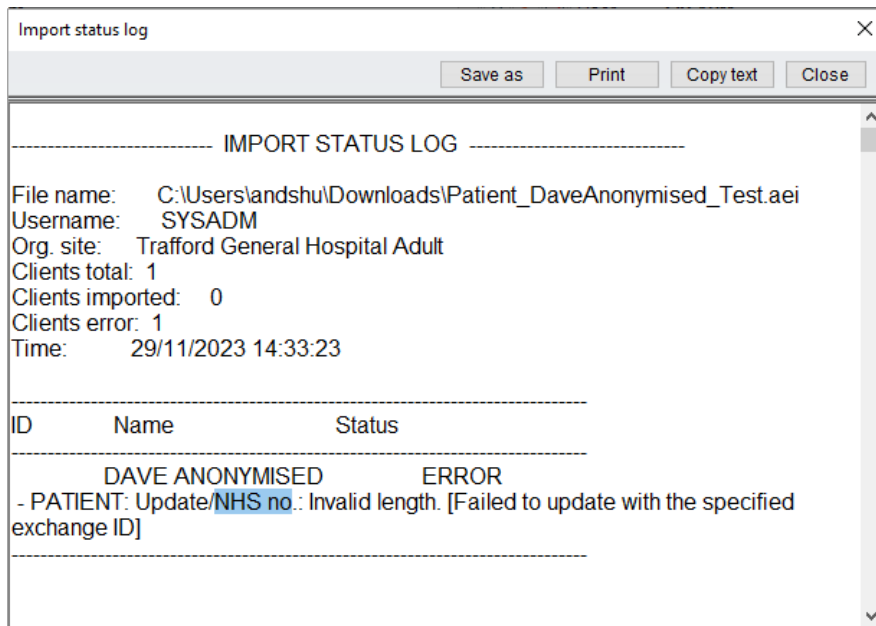
Output file

A **Match clients for import window** now opens. Automatically matched clients are shown in the bottom half of this window. If there is a problem with the matching of any client due to an absence of an NHS number or other match criteria, they are displayed in the top half of this window. Using the **Find match** and **Accept** buttons, you can decide whether to accept these clients or not. Once all the clients have been accepted, select **Import**.



Once this has been done, a progress bar will be displayed. As soon as the import is complete, an **Import status log** is shown. This log shows the following:

- Filename - that was imported.
- Username – of the user logged in during import.
- Org. site - the originating site of the import.
- Clients total – the total number of clients that were in the import file.
- Clients imported – the number of clients that were imported from the import file.
- Clients errors – the number of clients that had errors during the import.
- Time – the time and date of the import.
- Id, Name – displays the NHS number and name of the clients that were imported.
- Status – shows which client had an error during import.



This log can then be stored in a number of ways:

- **Save as** - the log can be saved as a text file to either disk, locally or to a network.
- **Print** – the log can be printed using the Windows default printer.
- **Copy text** – the log file is copied to the Microsoft Office clipboard and can be pasted into a Word document.

Once the log file has been saved or if you do not wish to save the log, **Close** will close this window. You will then return to the **PPP list**.

## 26.7 Exporting an Import/Export data file

Clients can be added to be exported by hitting **Search**. When a client is selected, they are added to be exported by pressing **Add client**. **Remove** will take the selected clients off the export list. Multiple clients can be selected using the Shift key.

The export file can either be password protected or locked for the particular external site. The **Export configuration** has to be selected from the drop-down list but can be cancelled by pressing **Cancel**.

Once **Export** has been selected, the **Password for encryption** must be entered twice for confirmation. Press **OK**, and a window opens to **Save export file** and the path where to save the file is defined.

Auditbase automatically names the file which can be renamed providing the file extension remains \*.agi.

Pressing **Save** is followed by a progress bar and when this has finished, the **Export status log** can be viewed or printed. The text can be copied and pasted into another application, for instance Word. The export log can be saved as a text file by selecting **Save as**.

**Close** will complete the export.

When exporting from a waiting list, the client's data will remain in the selected list and must be deleted when the export is initiated by moving the client. This should then also be reflected in the client information/Alert. See [Client information](#).

## 26.8 Importing an Import/Export data file

Client import for PPP

Import Cancel

Folder C:\Users\ANDSHU\Desktop\

File

File information

Exporting site

User

Date/Time

Number of clients in file

Import configuration

CSV file

Generate CSV file with client demographics

Output file

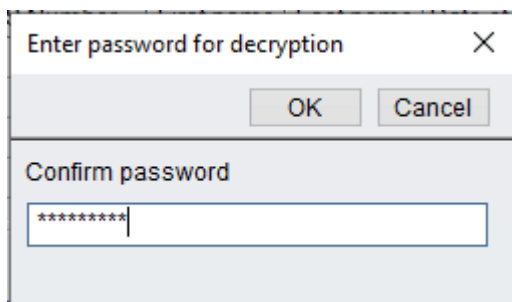
## 27 Noah Import/Export

### Noah import

It is possible to import client data from Noah, namely all Noah actions, including fast data views, actions in sessions, and client demographics according to the mapping in Auditbase Administration. Noah Audiograms can also be created as Auditbase audiograms. Noah Journal module's text content will be imported into the Auditbase Journal under the Keyword set in Admin; however, the attached files will not be imported.

*NOTE: the same patient can be imported multiple times.*

To import a file to Noah, go to the **File menu** > click **Import from Noah**. Two types of files are used for import: Nhax and Enhax (which is password-protected). When using an Enhax file type, it is necessary to enter a password.



### Pre-import dialog

On the **Import clients from Noah** dialog (which is shown before the actual import is performed), you can verify the number of patients in a file and patient details (Noah client no, social security number, first and last name, date of birth, gender).

*NOTE: you cannot import over 10 patients without an extended licence.*

Import clients from Noah

Import Cancel

Folder C:\Users\yanbya\OneDrive - AuditdataAD\Desktop\AUDITBASE 6.6.0\Noah import fi

File Happy\_Case.enhax

File information

Exporting site **Noah export file**

Date/Time **1/9/2024 23:15:39**

Number of clients in file **1**

Clients preview

Noah Client No	SS Number	First name	Last name	Date of birth	Gender
0000024	342198	Happy	Case	11/15/1975	F

User recorded under **John Parker**

Default journal keyword **ADMIN**

Social security no. will be imported to client's 'NHS no.'

Allow import of clients with Invalid Id

Apply notification rules based on audiograms

Collect all new and matched clients in a List

List for new patients

List 1

List for merged patients

List 2

Import configuration

Noah import configuration

The pre-import dialog also displays:

- **User** that all import actions will be logged under. *It is recommended to have a specific user for Noah imports. All imported records will be logged under this user regardless of who created them.*
- **Journal Keyword** used for saving all records that are imported from the Noah Journal Module.
- **Social security no. will be imported to ...** - shows which Auditbase identifier (Hospital no. or NHS code) Noah's Social Security number will be mapped to. The matching of identifiers is set in Auditbase Administration (via Data handling and technical > Export / Import to Noah settings)
- Whether patients with **invalid IDs** can be imported. If invalid IDs are allowed, patients with such IDs will be listed under 'Clients with match problems' on the 'Match clients for import' dialog.
- **Apply notification rules based on audiograms** - an option to apply Auditbase notification rules for audiogram content. The checkbox controls whether you will be shown

notifications immediately after import.

- **Lists for new and merged patients** that in Auditbase Administration can be configured as either Client Lists or Trial Lists. You will need a Noah import licence to be able to collect all new and matched clients in a List.
- **Import configuration:** if there are several configurations set up in Administration, use the dropdown to select the required configuration from the list.

*NOTE: pre-selected checkboxes on the Pre-import dialog show that the option is enabled in Administration; empty boxes signify that the option is available but was not activated in Admin. Greyed out Client lists/Trials section means that the extended licence was not granted.*

Use the **Import** button to open the Import dialog. The import process is not initiated at this stage.

### Import dialog

On the 'Match clients for import' dialog, you can review clients with matched problems and automatically matched clients. The dialog is resizable, and the system remembers the last used size and returns to that size.

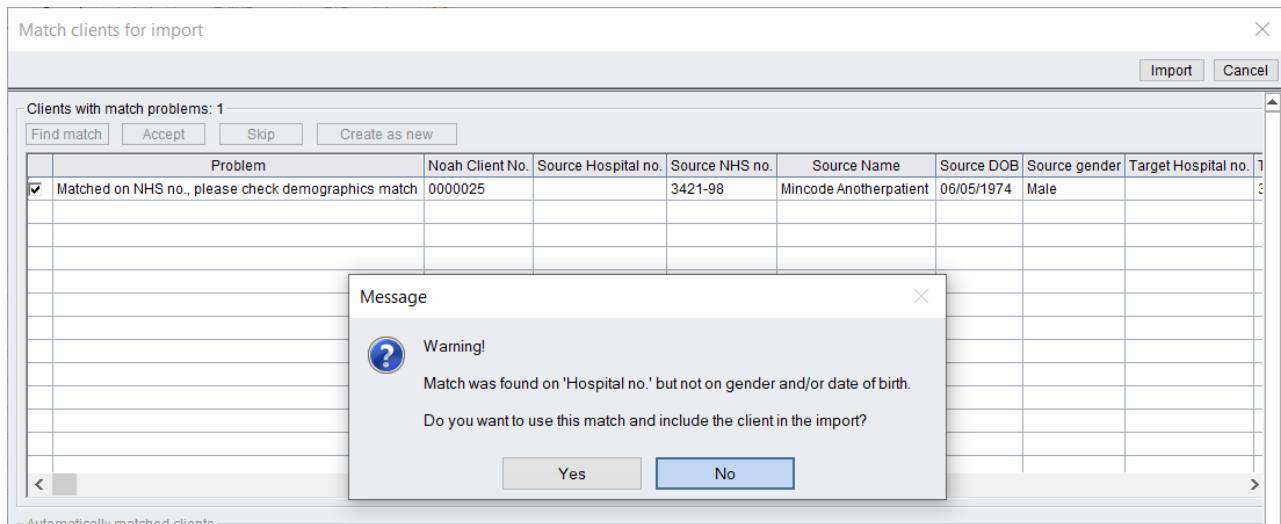
The table provides patient details (DOB and Gender for both the source and the target patients as well as Auditbase identifiers, i.e., NHS no./Hospital no.), so that matching can be analysed better.

- An import file can be processed more than once; not all patients need to be imported on each processing.
- If a patient has been imported before, then you cannot change the match to the patient in Auditbase; that patient will be shown as matching on Noah's internal ID.
- Demographics matching is done on First name, Last name, DOB, and Gender. For the matching of two patients, all four attributes must not be empty and must match. If only some criteria are met on a particular pair, that pairing is not suggested to the user and the record is reported as a **New client**.

### Clients with match problems (top list)

Here you can see records for import where an issue is found that needs to be resolved. When you select a row in the top list, the following controls become active: **Find match, Accept, Skip, Create as new**.

If you tick the left-hand column, any problems will be alerted on a message. You can also review the text in the **Problem** column.



The issues described in the Problem column may be as follows:

- If a Noah patient has an ID that does not pass Auditbase validation rules but the import of patients with invalid IDs is allowed, the system will inform that *"Invalid <id name> must be corrected in Auditbase before any changes can be made."*
- If a match is found on the Identifier number in Noah with the Auditbase identifier (whichever type has been configured as matching) but Name, DOB, Gender do not match, the following text is displayed: *"Matched on <id name>, please check demographics match,"* and the system suggests the target patient. Selecting another patient is allowed.
- If the Identifier is not matched but a single match on Name, DOB, Gender is found, the following text is displayed: *"Matched one result only on Name/gender/DOB, <id name> does not match,"* and the system suggests the target patient. Selecting another patient is allowed.
- If the Identifier is not matched and multiple matches are found on Name, DOB, Gender, the following text is displayed: *"Match to more than one result only on Name/gender/DOB,"* and the system does not suggest a target patient, the target name says '<multiple match>' and the user must select a patient for match.

### Automatically matched clients (bottom list)

Here you can review records that were matched automatically. To be able to use available controls, you need to select a row by clicking on it so that it becomes highlighted. Then the buttons become active: **Find match**, **Accept**, **Skip**.

Automatically matched clients: 1

Find match Accept Skip

	Import match status	Noah Client No.	Source Hospital no.	Source NHS no.	Source Name	Source DOB	Source gender	Target Hospital no.	Target NHS no.	Ti
<input checked="" type="checkbox"/>	Matched on Noah internal ID from a previous import, cannot change target	0000028		9999-9	Match MainCode	06/11/1974	Male		9999-9	Mat
<input type="checkbox"/>										
<input type="checkbox"/>										
<input type="checkbox"/>										

The **Import match status** column contains a description of the match status.

Possible matching scenarios:

- **A match is found between the user entered identifier number in Noah and the linked identifier code type in Auditbase; First Name, Last Name, DOB and Gender match.** The Import match status says *'Match on <Id name>/name/DOB/gender'*. The system suggests the target patient and automatically selects the checkbox in the left-hand column to include the patient in the import.
- **The record from Noah has been imported previously; the match to that Auditbase patient is locked.** The dialog shows the target patient and the text says *Matched on Noah internal ID from a previous import, cannot change target*. The record can be reimported to update the information from Noah.
- **If the record was imported previously, so it matched on the internal identifier, but Name, Gender or DOB differ,** the Import match status is described as: *Matched on Noah internal ID from a previous import, name/gender/dob doesn't match*. In this case, the system does allow the import to proceed if the user changes the Import checkbox from clear to selected, so users have to review the match.
- **No match is found on identifiers or demographics.** In this case the system does not suggest a target, and the Import match status contains **New client** but an existing patient can be selected for matching.

Click **Import** to start importing patients. *NOTE: The checkbox in the left-hand column must be selected for any record to be imported.*

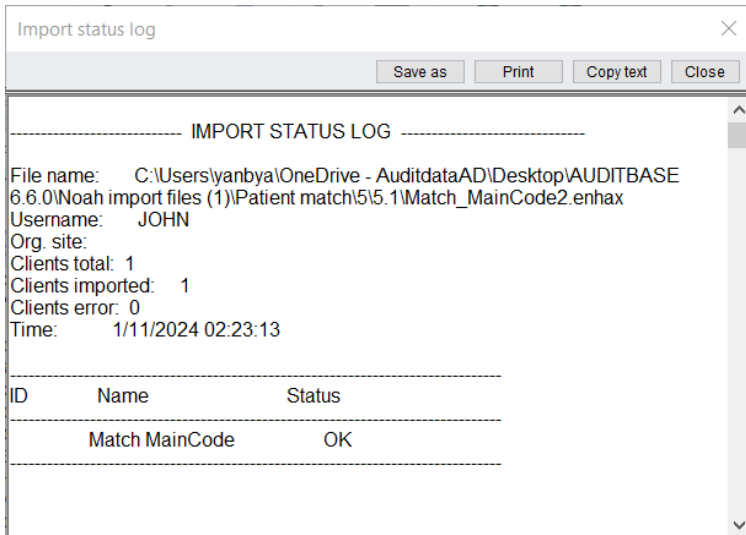
Since another user can potentially add or modify Auditbase patients on another workstation while the Import dialog is still open, the uniqueness of patient identifiers is checked during import. If any identifiers are found to be duplicated, this information is included in the text log produced after the import, and a warning is displayed to review the log.

### Post import dialog and logging

On the Import Status Log, you can review:

1. File user statistics on file content;
2. List of patients and their status.

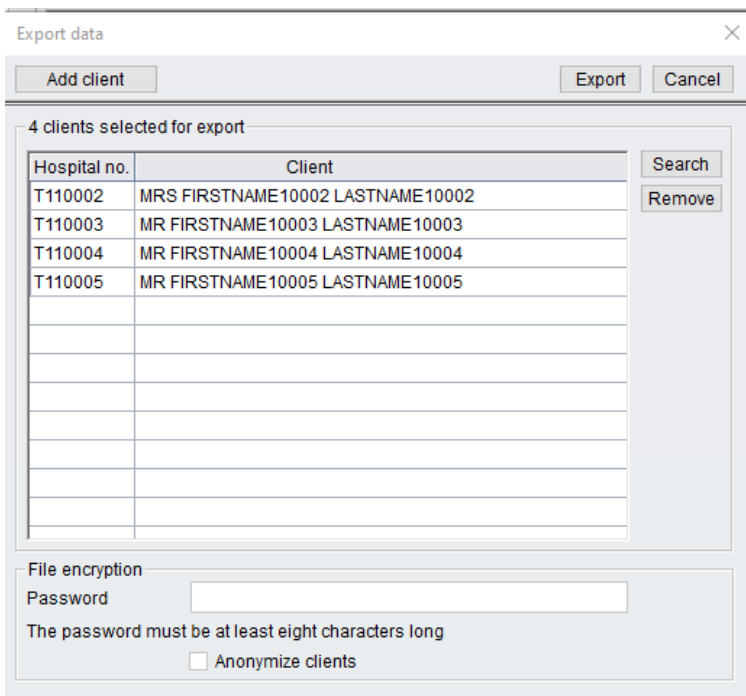
If necessary, the log can be saved to a secure location.



## Noah export

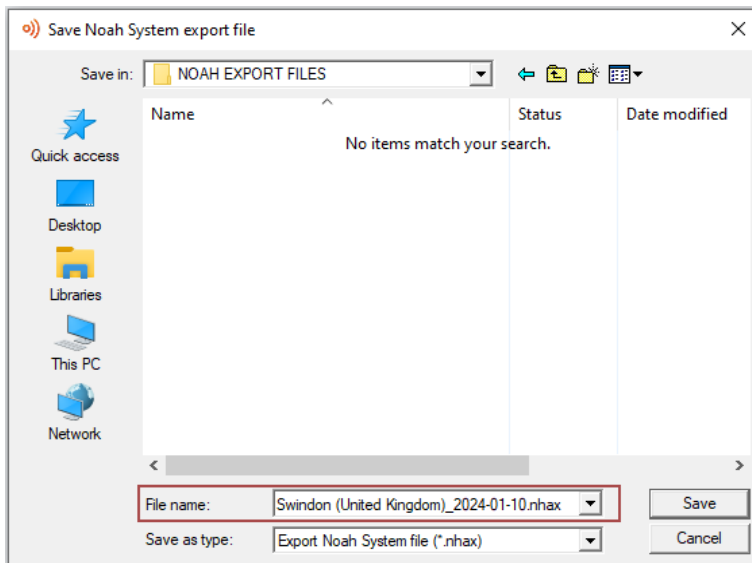
To export a file to Noah, go to the **File menu** > click **Export to Noah**. On the 'Export data' dialog, click **Add client** to add the current global client to the export file. Use **Search** to add multiple clients.

Use the export preview to verify export information and, if necessary, **remove** those clients that do not need to be exported.

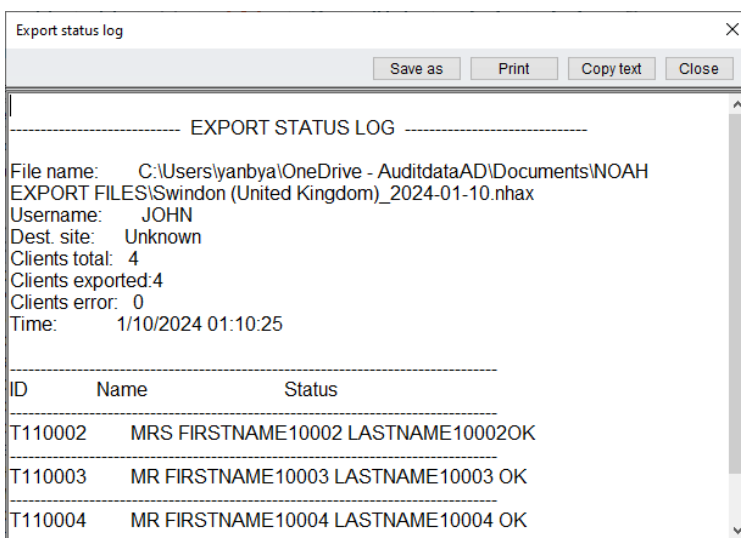


You can protect the file with a **password**. If you enter the password in the corresponding field, an Enhax export file will be created. If the password is not set and the field is left blank, the system will create an Nhax file.

For security reasons, you can **anonymize** clients by selecting the corresponding checkbox.



After the file is exported from Auditbase, an Export Status Log is shown with export information specifying the folder where the export file is stored, the name of the user that initiated the export, the number of exported clients, etc.



## 28 Reports

Click the button below to access our training materials.

eLearning

You can create your own reports or queries in Crystal Reports, Microsoft Query and Microsoft Excel, and access them directly from Auditbase. Reports can be stored in sub-directories in the correct country directory under the directory specified in **Auditbase Administration -> User and workstation options -> Workstation settings -> Printing and reports -> Path to reports**. The system shows reports in a folder-like structure corresponding to the disk sub-directories reports. This may be used for logical reports grouping. Folders will appear under each tab on the User Reports dialog whether they include reports of that type or not.

A CSV reporting tool tab provides reporting in a different format. Report parameters are indicated and corresponding values must be selected in order to run the report.

When you open a Crystal Reports report, the database, user and password currently used in Auditbase will be used for an automatic login with the ODBC data source name Auditbase - ODBC. When using Microsoft Excel and Query, you will be prompted for login, with database and username set in the ODBC set-up in the administration tool.

To edit a report made with Crystal Reports, you will need a full installation of Crystal Reports Professional edition. A license for this product is not provided by Auditdata. With Auditbase only a viewer for existing Crystal Reports 11 is provided. When Standard User reports provided with Auditbase are saved, they are editable in Crystal Reports Version 9 Professional. However, this version will not work on an Auditbase client PC without first installing the Crystal Reports Service Pack 7, which can be found on the Auditbase installation disk or on the Crystal Reports website.

To use the Microsoft Excel and Query examples you will need an installation of Microsoft Office (or the products mentioned), in order to open the files. To open a Microsoft Query file (\*.dqy) in Microsoft Query, you will need to manually associate the file type with Microsoft Query.

### Notes:

Microsoft Query editor is not installed by default by the Microsoft Office installation wizard.

When you create your own new report, you should always use the ODBC data source name (also called DSN) Auditbase - ODBC to make sure the settings are correct. You should then make sure your report is located in the folder specified by the system administrator.

When you create reports in Microsoft Excel, you should be aware that Excel by default saves the password and data with the spreadsheet. To avoid this, you should modify the properties for the data area in the Excel sheet. With Crystal Reports, you have a similar setting under **File -> Save data with report** where you should avoid saving data with the report.

If using Windows Single Sign-on to access Auditbase and you receive a log in prompt for any report, please enter an asterisk symbol \* in the user field and leave the password field empty.

### **Be aware**

It is strongly recommended NOT to edit data in the Auditbase database from an external tool. Errors caused by such an action are not supported by Auditdata. If you want to edit data in an Auditbase database from an external tool, you should only do it on a database copy - never the live database - and make sure you are actually connected to this copy before performing any actions.

## 28.1 Report examples

The following reports (specified by the UK user group) have been supplied as examples on how to access the Auditbase database from external tools supporting ODBC.

### Crystal Reports

#### Age of All Clients Alive

Shows the basic client data with a simple calculation of the age based on today's date and date of birth. Only clients alive are listed.

Created with Microsoft Query.

#### All Client Type of Aid - Quantity Controlled

Shows the quantity controlled hearing instrument models and counts currently issued. The report is based on stock types set up as Released.

Created with Crystal Reports.

#### All Client Type of Aid - Serial Number Controlled

Shows the serial number controlled hearing instrument models and counts currently used by clients alive, in the specified date of birth range. Aids issued to clients with no registered date of birth will not be included. The report is based on stock types set up as Released.

Created with Crystal Reports.

#### Appointment symbol list

Shows the Appointment symbol names and symbol id referenced from Calendar table

#### Appointment Type and Article

Shows the hearing instrument models and count associated with the appointment type the client had in a certain date range.

Created with Microsoft Query and Microsoft Excel.

#### Duplicate lastname, firstname, DOB and sex

Shows groups of clients having the same last name, first name, DOB, and sex and displays their addresses and primary codes so that merging can be considered.

#### Earmould Types Left

Shows the count of the different types of earmoulds for left ears made in a certain date range.

Created with Microsoft Query.

**Earmould Types Right**

Shows the count of the different types of earmoulds for right ears made in a certain date range.  
Created with Microsoft Query.

**Earmould Types**

Shows that you can have two Microsoft Queries in the same Excel sheet.  
Created with Microsoft Excel.

**Firstname with space character at beginning**

Lists clients having a space character at the start of the name which therefore may not be found using Firstname as a search criteria.

**Lastname with space character at beginning**

Lists clients having a space character at the start of the name which therefore may not be found using Lastname as a search criteria.

**Hearing Aid Clients Male-Female-Other**

Shows the distribution of gender among clients alive. Can also be used to check for typing errors in the gender data field.  
Created with Crystal Reports.

**Hearing Aid Clients Gender Other List**

Lists clients alive with a gender different from M (male) or F (female). Should be used to check for typing errors in the gender data field.  
Created with Crystal Reports.

**Hearing Aid Type**

Shows basic client data with used hearing instrument(s) born in a certain date range.  
Created with Microsoft Query.

**Incorrect Age**

Lists all clients with a default age of less than 0 (negative) or greater than 110, default can be changed. Use this report to check if you have clients with wrong D.O.B. registration.  
Created with Crystal Reports.

**Number of 15 Minute**

One-page report displaying the most frequently used appointments in a pie chart. This version is ordered by the number of used 15 minutes timeslots in a certain date range. This report also demonstrates how to use parameters in Crystal Reports.

Created with Crystal Reports.

### **Number of 15 Minute - Resource**

Same as above, except that you can limit the appointments to those booked with a certain resource. The resource parameter can be configured to some default values. This is site dependent and has to be done for each site. The resource parameter must match the case used in the database (upper case).

Created with Crystal Reports.

### **Number of Procedures**

One-page report displaying the most frequently used appointments in a pie chart. This version is ordered by the number of procedures booked in a specific date range. This report also demonstrates how to use parameters in Crystal Reports.

Created with Crystal Reports.

### **Number of Procedures - Resource**

Same as above, except that you can limit the appointments to those booked with a specific resource. The resource parameter can be configured to some default values - this is site dependent and has to be done for each site. The resource parameter must match the case used in the database (upper case).

Created with Crystal Reports.

### **Number of referenced appointments**

Appointments created with Referred by field completed.

### **Number of Left Earmoulds**

Displays the number of earmoulds for left ears created in a specific date range.

Created with Microsoft Query.

### **Number of Right Earmoulds**

Displays the number of earmoulds for right ears created in a specific date range.

Created with Microsoft Query.

### **Client List With Temporary Numbers**

Lists all clients that have been created with a temporary hospital ID. If you use a prefix different from 'T' for your temporary hospital IDs, you will need to modify the criteria in the report.  
Created with Crystal Reports, Microsoft Query and Microsoft Excel.

### **Referrals grouped by Treatment Type & Client's GP PCT Code**

Shows summary count of client referrals between specified Start and End dates, grouped by Client's GP PCT Code and by Treatment type.

### **Referrals grouped by Treatment Type & Client's GP PCT Code – detailed**

Shows summary count and individual details of client referrals between specified Start and End dates, grouped by Client's GP PCT Code and by Treatment type.

### **Post Code Extract**

Lists hospital ID with post code for all clients where the Comm. Hearing Aid or the NHS Hearing Aid check box has been checked in the Client information window, but you can modify this to meet your wishes. This report is intended for further processing by another tool - i.e. Excel.  
Created with Microsoft Query.

Furthermore, a report to view/print the schedule of a certain resource has been added as a system report, and it can be accessed from the menu **Functions->Print schedule** in the **Booking** screen. This report should not be modified by the user.

### **Activity by PCT code**

Shows a table of appointments by PCT code within a date range. The PCT code is taken from the Referring Agents (GP) table within Auditbase.

### **Appointment code numbers**

Shows the appointment symbol names and their symbol id referenced from the Calendar table.

### **Appointments by PCT code with date range**

This shows two tables of selected appointments using the code numbers obtained from the Appointment code numbers report. The first table shows how many appointments have been made for each PCT code. The second shows the amount of time in weeks that the appointments have been waiting since their referral. To use this report accurately, the referral page must be used.

### **Waiting list by customer with last referral using AC date**

This report shows two tables of selected waiting lists using the code numbers obtained from the Waiting list code numbers report referenced to the customer table rather than the Referring

Agents table. The first table on the report shows how many clients are on the selected waiting lists for each customer. The second table shows how long each client has waited on the selected waiting lists for each customer. The wait time is calculated from the last audiogram made for the client.

### Waiting list code numbers

Shows the waiting list names and their symbol ID referenced from the waiting list table.

### Waiting list printout with addresses

Shows a printout of a selected waiting list and includes the following details:

- Wait time – taken from the waiting list module.
- Hospital number
- Name and address
- Date of Birth
- Postcode
- Home phone
- Information taken from the waiting list module

### Custom Report and Statistics

These reports can be accessed from the **Custom reports and statistics** reporting tab and will report data in Comma Separated Values (CSV) format. For these reports, the user is able to select the parameter values from a list of options (pre-defined in Administration).

Reports for this tab can be found in the folders:

- AQP reports
- Surgery
- CIDS reports

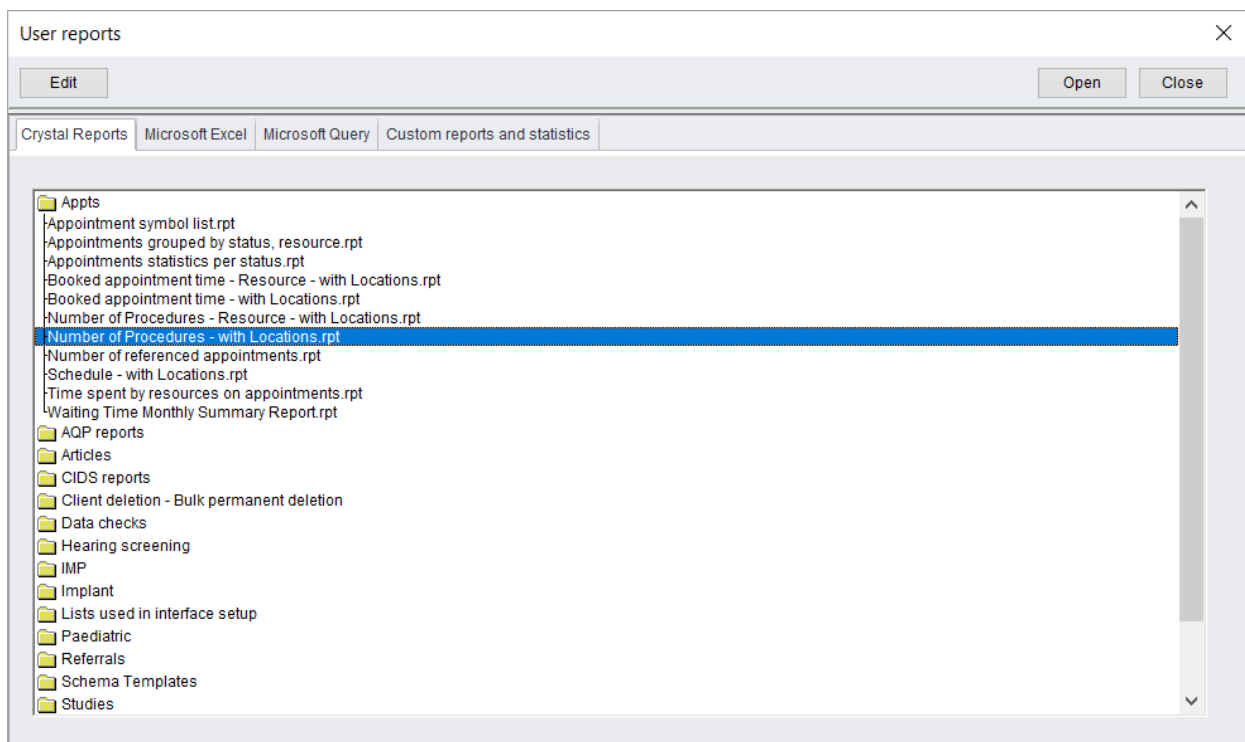
These include:

- AQP - Monthly full patient minimum dataset – Per piece of activity
- AQP - Monthly full patient minimum dataset – Per referral
- Hearing aid journey outcomes
- Patients access service in extended hours
- Re-fitted with hearing aid after re-assess
- Referrals with a 'rejected' referral outcome applied in a chosen period
- Referral with an outcome of a request to transfer provider
- Aids replaced due to mechanical failure
- Lost, damaged hearing aids
- And more.

## 28.2 Running a standard user report

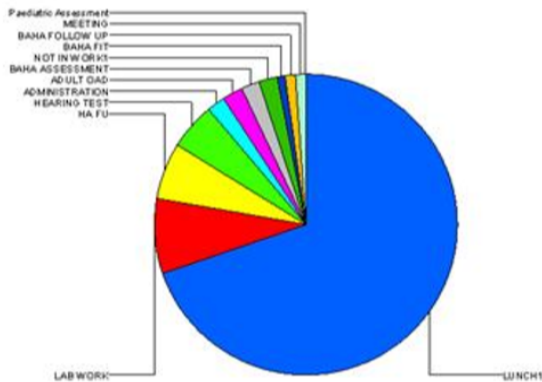
A series of standard reports are available in Crystal Reports, Excel or Microsoft Query report formats.

- **Navigation -> User Reports.**
- Use the tabs to select a *Crystal Report, Microsoft Excel, Microsoft Query or Custom report*.
- Open the relevant folder.
- Select the relevant report.
- Select **Open** or double-click the report to run it.



An *EXAMPLE* of a standard user report indicating clinical activity in a department:

- Open the **Number of procedures** report.
- Select a **Start date** for your report.
- Click on **End date** and select the date you want the report to end.
- Click **OK** and then view the report and/or print it.



AMOUNT (%)	PROCEDURES
756 (69,8%)	LUNCH1
86 (7,9%)	LAB WORK
66 (6,1%)	HA FU
55 (5,1%)	HEARING TEST
22 (2,0%)	ADMINISTRATION
22 (2,0%)	ADULT OAD
22 (2,0%)	BAHA ASSESSMENT
20 (1,8%)	NOT IN WORK1
11 (1,0%)	BAHA FIT
11 (1,0%)	BAHA FOLLOW UP
11 (1,0%)	MEETING
1 (0,1%)	Paediatric Assessment

### Crystal Reports

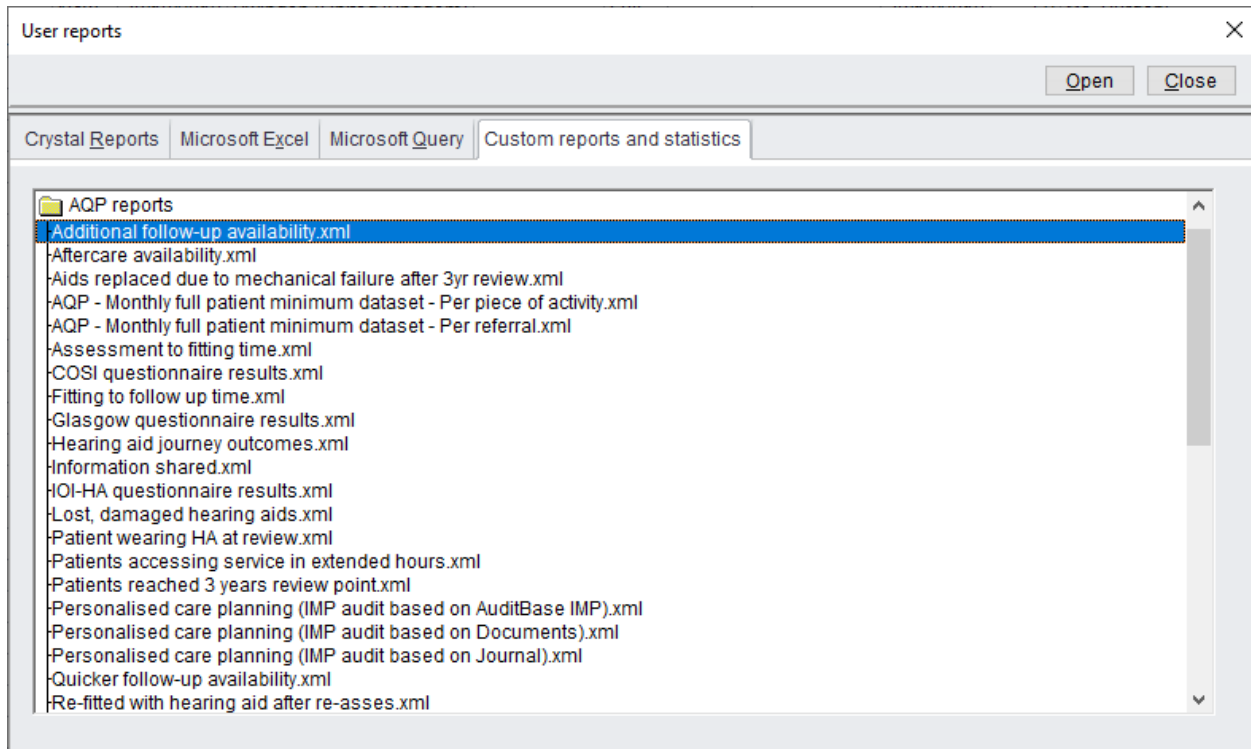
- You may need to press the refresh button on the report to update the report.
- **Print** as required.

The user reports will only work on a computer where the system administrator has enabled the correct driver.

For advanced reports, Crystal Reports training courses can be provided. Please contact the Auditdata Help-desk for further information.

## 28.3 Running a report from the Custom reports and Statistics tab

Select and **Open** the required report by double clicking it.

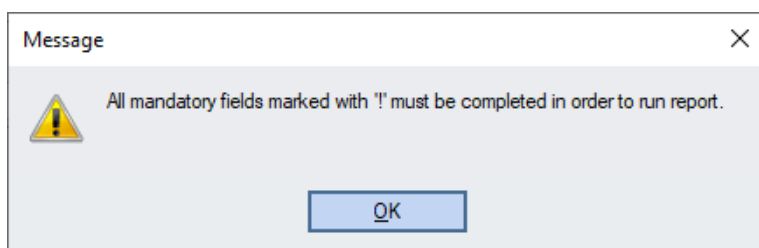


To set up the report fill each of the mandatory parameters and whichever of the non-mandatory parameters you want to filter your data on.

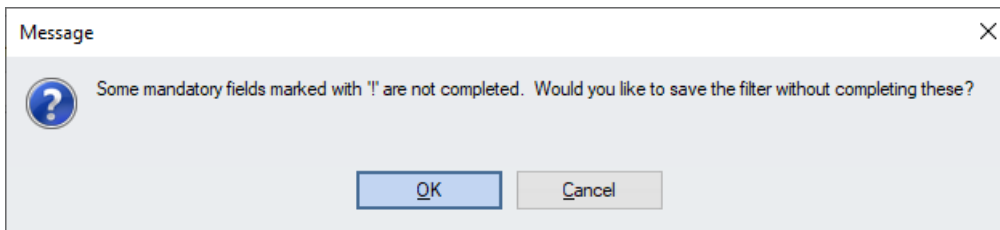
### Mandatory items

The red exclamation mark alongside a parameter denotes a mandatory field. When a mandatory field is completed, the exclamation mark will disappear from alongside it.

If you attempt to run a report without completing one or all of these parameters, a warning will appear on screen.



If you should save a report without completing one or all of these parameters, a warning will appear on screen.



### Output file name and location

Each report requires a designated name and location for the output file, which is where the data will be saved once the report is run. On selecting the **Value** field for the output file the user must browse to select the destination folder for the report output.

It will however still be possible to save the report without completing the mandatory fields.

### Filling parameter values

Parameters selections are made in recognisable controls depending on the type of data, such as dates, single selections, multi-selections, number fields, etc.

For drop-down single selections, click on the drop-down arrow for a parameter.

Report Filters

Current filter  
Default [Default] Save Save as ... Delete

If at least one of report dates is not entered, the previous whole calendar month will be used.  
When clicking 'Save parameters for future use' or 'Save parameters for future use and Run report' Run report

If report start or end date is not entered, then start or end of the previous whole calendar month will be used.

Start date

End date

Holiday and working day settings, if saved, will be used also for other AQP reports.

Holiday date 1

Holiday date 2

Holiday date 3

Holiday date 4

Holiday date 5

Saturdays are working days  
No

Included additional GP details  
No

Parameters below are only saved for this report:

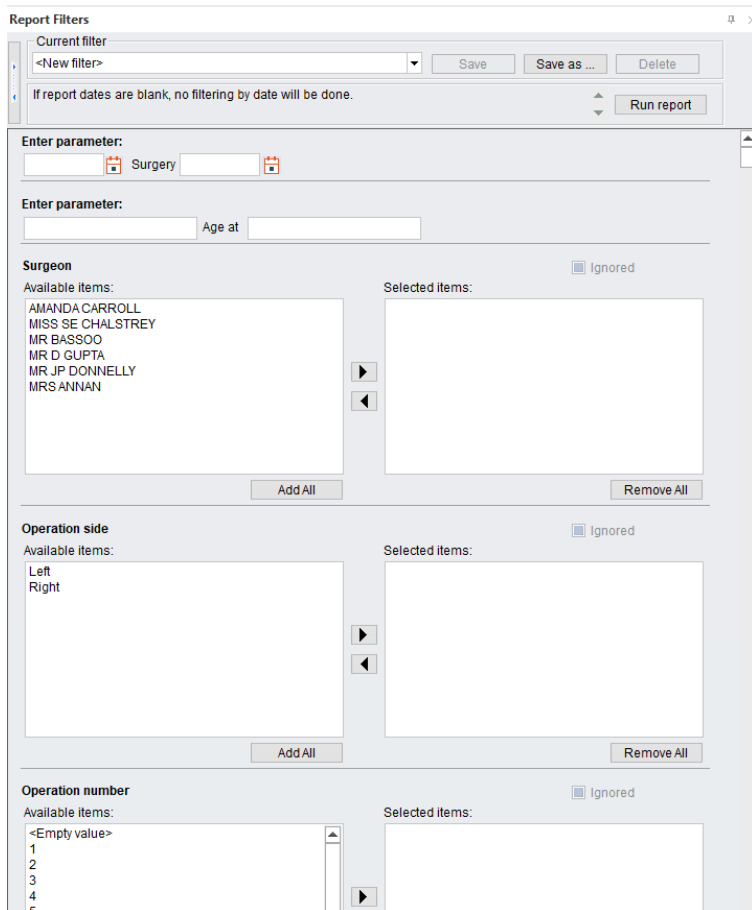
Exclude patients with alerts and parameters in list Show list items

Include only patients with alerts and parameters in list Show list items

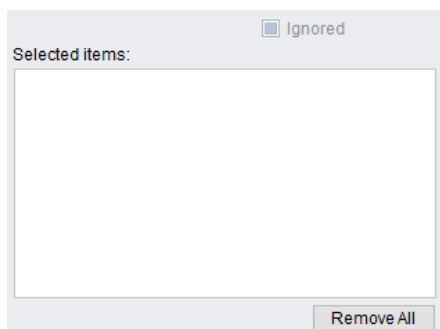
Select the value you wish to populate that parameter.

### Multi selection fields

To report on multiple values from multi-selection fields, each value is clicked on and moved to the **Selected items** box using the arrows adjacent to the box. When a value is transferred to the **Selected items** box that value will be reported on and anything left in the **Available items** box will not be reported on.



Above each **Selected items** box is a check box titled **Ignored**. This remains checked until a value is moved into the box. If values are not moved across to a **Selected items** box and that box remains empty, no filtering will be done on that selection and all parameter values will be included in the report.



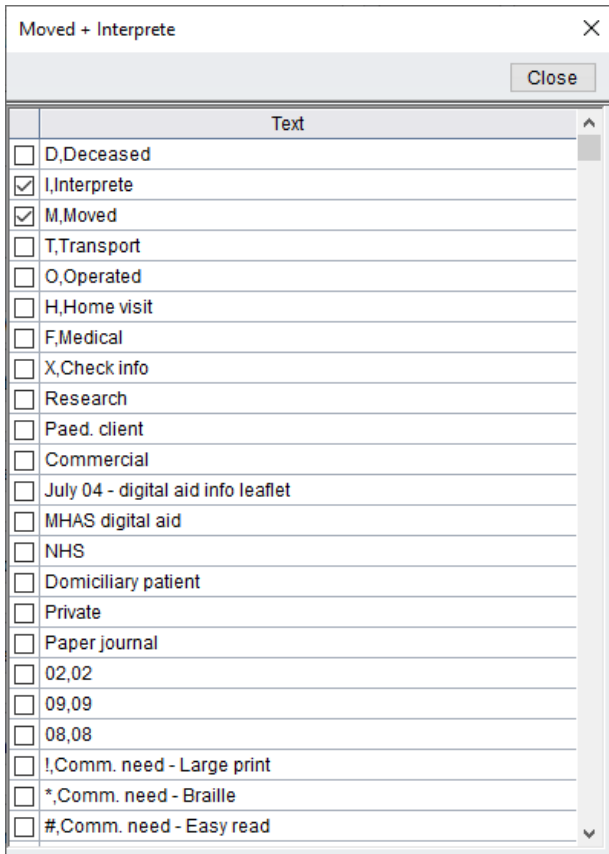
### Lists

If there is a list of possible values which could be used in multiple reports (such as Assessment appointment symbols) these can be defined in **Lists** set up in **Auditbase Administration -> Other definitions -> Lists for report parameters**.

### Show List Items

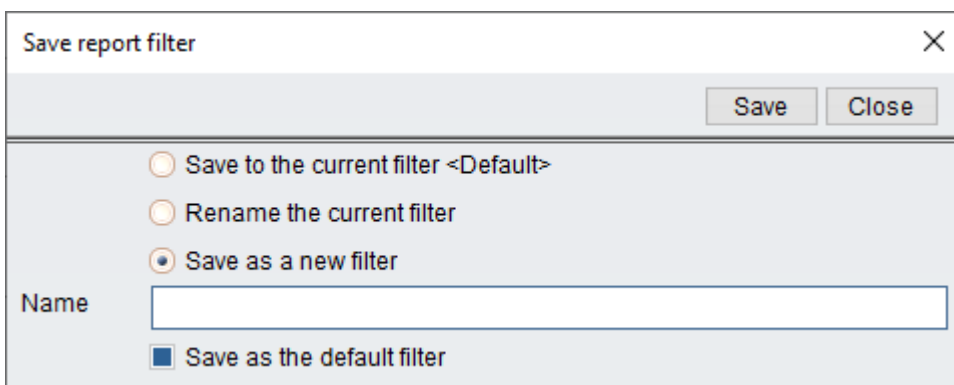
When a parameter is a list of items, you can view the items by clicking on the **Show list items** button. The button will only appear when you have selected a value containing a list.

Although the list items will be shown, you cannot make changes to the list from here. This must be done from within Auditbase Administration since the same list may be being used in other reports and to make changes will affect all the reports it is used in.



### Report Filters

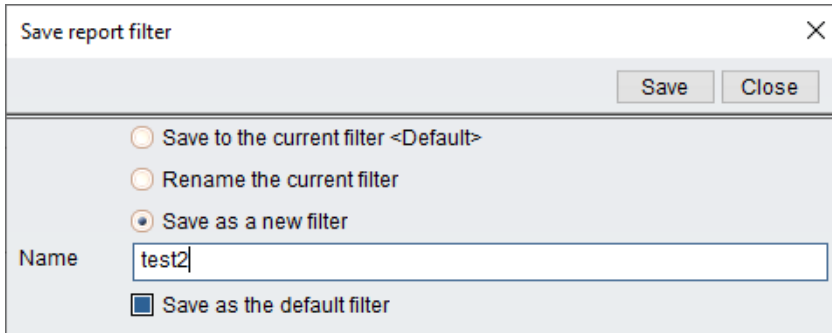
To save report value selections you have made, click **Save**. You will be asked to give the selections a **Filter** name.



Once you have done this, the report selections are saved as a named **Filter** and can be accessed from the **Current filter** drop down list.

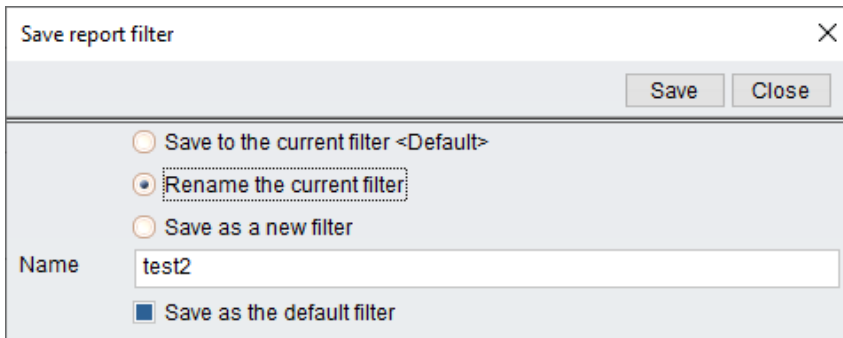
### Multiple Report Filters

You can create differing versions of the same report and save them as **Filters**. To do this, open the report you wish to adjust the parameters on. Change the values and click **Save as**. Give the filter a name.



This will now be available in the **Current filter** drop down box along with your original report set-up. Saving each report change as a filter will mean they are all there to be re-used in the future. There is no need to keep re-building reports with varying values.

You can also direct Auditbase as to which report should be the default.

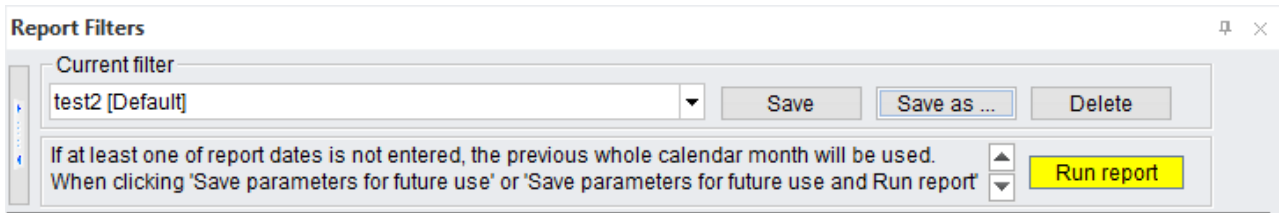


The report will always open the default report as standard.

If you have made changes to report parameters but have not saved them, you will be asked if you wish to save them if you re-open the User reports list or exit Auditbase.

### Run and refresh

The **Run report** button will highlight yellow as soon as a parameter is changed. This will alert the user to the need for refreshing the existing report output. Clicking on the **Run report** button will generate a new output for CSV reports.



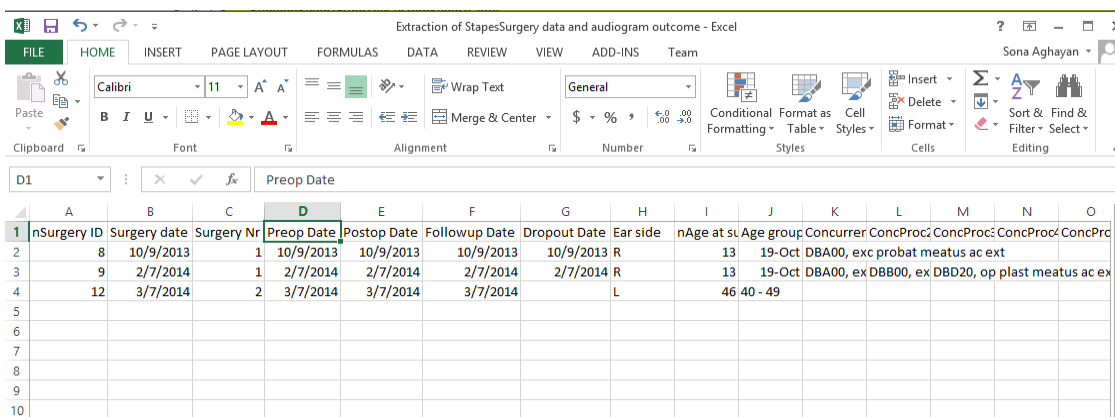
The white space to the right of the parameter lists will display the running dialogue and its progress. If the report data is short, the dialogue will only flash onto the white area before disappearing. A **Stop** button will display along with the report dialogue in order that the process can be brought to a halt if it is taking too long to complete.

A LOG file is included in the output file in case there were errors which can be reported to Support. If the report ran without errors, then it does not need to be retained and can be deleted.

Once the report has completed running, the output file will open automatically in Excel.

### Opening the report in Excel

The output file will open automatically in Excel.



Data will populate the corresponding headed columns. Empty cells will indicate there is no corresponding information available in the patient’s record.

The CSV report once opened in Excel can be re-saved as an Excel document using the **File -> Save As** option. If required it can also be renamed and/or dated to prevent overwriting by a future report run.

### Opening other reports from the Custom reports and statistics tab

To open a new report, go back to **Modules -> User reports**.

When you open a new report from **Modules -> User reports**, and another report is already open, the back-ground screen will change. Despite this, the report screen will re-open once your desired report has been selected.

### Custom Reports and Statistics with Crystal report output

Only in the Surgery folder will you find reports that display as Crystal reports. The Crystal report output is displayed in the white space to the right of the report parameters.

When parameters are changed on a report, clicking the **Run report** button will cause the report to be refreshed. Differences in output with modified selections can therefore be easily seen.

Crystal report output can be exported to a PDF document.

### **Scroll Bar**

The scroll bar to the right of the report cannot recognise the size of the report and therefore will always display as though the report is large (the scroll bar will be small). This scroll bar does not support mouse scroll wheels.

## 29 Communication

## 29.1 Task list

Click the button below to access our training materials.

eLearning

A task list is a list of tasks that are not completed yet, for instance new appointments. Access the Task list module from **Navigation** -> **Task list** or press **Shift+Ctrl+T**.

	Date created	Task type	Task label	Description	Hospital no.	Client name	Assigned	User	Completed by	Date completed
<input type="checkbox"/>	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME32	SYSTEM ADMINISTRATOR		
<input type="checkbox"/>	04/08/2021	Repair			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME41	SYSTEM ADMINISTRATOR		
<input type="checkbox"/>	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME67	SYSTEM ADMINISTRATOR		
<input type="checkbox"/>	04/08/2021	Repair			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME42	SYSTEM ADMINISTRATOR		

- The Task list shows the tasks created by any user linked to the current location or to the global location. Change location to filter all entries for the desired location or choose **All** to see all tasks.
- When location filtering is used, tasks will appear in the locations to which both the assignee and the assigner belong.
- **Tasks assigned to me** will show all your tasks to do regardless of location.
- To create a new task, click **New**.

**New task**

Buttons: Add client, Clear client, Search client, Save, Cancel

**Client**  
 Hospital no. T18767 Name FIRSTNAME8767 LASTNAME8767

**Task**  
 Date 13/01/2020  
 Task type Clinic  
 Task label  
 Priority Normal  
 Description

**Assign**  
 Users  
 USER NAME11  
 USER NAME67  
 USER NAME44  
 USER NAME14  
 USER NAME9  
 USER NAME92  
 USER NAME35  
 Resource group

User full name tests???

- Select a client.
- Click **Add client** to select the current client or press **Alt+a** for a shortcut to add the current client. If you wish to add a different client, click **Search client**. Click **Clear client** to create a task without associating it with a client.

- Select **Task type**, for instance Appointment or Audiogram. The task types are predefined by your System Administrator. Task types can be outdated by your system administrator and if so they will show in Auditbase with an asterisk \* but will not be selectable.
- Select **Task label**. The task labels are only enabled in Auditbase if defined by your system administrator first and linked to a task type.
- Add/move sections from below on entering Assignee, date priority etc.
- The default date is set to today's date. You can change the date manually.
- Select the person to whom you wish to assign this task. You can select one or more resources or a resource group. Users are listed by those from the currently selected location first.
- You can set the task to high, normal or low priority.
- The System Administrator can link a predefined description to the task label or you can type a description here.
- When you have completed a task, select the check box column to the left and click **Complete**.
- To delete a task, select the check box column to the left and click **Delete**. Deleting tasks is a permanent action. Once deleted, tasks cannot be retrieved. The System Administrator can control which users are permitted to delete tasks which are not created by themselves. If a user does not have the extended user right **Task list: Delete any task** they will only be able to delete tasks created by themselves.
- A warning is displayed to users when deleting tasks and includes the number of tasks being deleted, this will mitigate the risk of users accidentally deleting tasks or deleting more tasks than intended.
- An Auto Journal Event can be enabled for Task deletion of uncompleted tasks associated with Clients. This can be used to ensure that a record of an uncompleted Client Task is always kept since it can include the Task description.

From the task list view you can see the priority of a task, which can be high, normal or low:

! High priority

↓ Low priority

- To filter the task list view, select a filter from the drop-down box. You can also filter on **Completed tasks** by checking the corresponding box.
- Tasks related only to the current global client can be filtered by selecting **Tasks for selected client** from the filter drop down.
- The content of the filter and state of the Completed checkmark is remembered for each user so they do not have to reapply their preferred filter.
- To edit a task, double click on the task or select the check box column to the left and click **Edit**.
- When a user selects a Task on the list which is related to a different client, the System Administrator can enable a warning to the user that the client is changing.

- As a default, only the creator of the task and the person assigned to the task have a right to edit the task. However, the system administrator can give extended rights to other users so they can edit tasks as well.
- Click **Save**.
- When assigning a task, the user to whom the task was assigned will be alerted. If the task is assigned to a whole group, all resources within the group will receive an alert. The user must be associated with a group to receive group alerts. The alert for the task will be cleared for all resources once the first user opens the task for review. Your system administrator can set up whether the user should be notified only at login or also on the screen while working.
- Bulk multi selection of Tasks is done using Shift and Control buttons in combination with the mouse click in the normal Windows method. This will highlight the chosen rows in black which can be selected for a Delete or Complete operation by checking the Select highlighted button which reads Select all when no rows are highlighted.

Auditbase - [Task list]

File Functions

Client T132153 MR FIRSTNAME32153 LASTNAME32153 User SYSTEM ADMINISTRATOR All locations All departments

Filter All  Completed  Select highlighted rows

		Date created	Task type	Task label	Description	Hospital no.	Client name	Assigned	User
<input type="checkbox"/>	!	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME32	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Audiogram			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME11.	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Audiogram			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME67	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Earmould			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME32	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME11.	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Repair			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME41	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME67	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Repair			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME42.	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	✓	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME11.	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	✓	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME67	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	!	04/08/2021	Audiogram			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME32	SYSTEM ADMINISTRATOR
<input type="checkbox"/>	✓	04/08/2021	Appointment			T132153	MR FIRSTNAME32153 LASTNAME32153	USER NAME32	SYSTEM ADMINISTRATOR

## 29.2 Auditbase Viewer

The Viewer enables a user to view a client's articles and audiograms. The user is not allowed to enter any client data.

The Viewer is typically used as an interface application between a central Client Journal system and Auditbase.

- Start the **Viewer** from the desktop icon.
- Log in with username and password.

You can also start the Viewer from the command line or from external application launch facilities in third party applications in the following way:

- To start the program only by logging in:
  - Viewer.exe – DBNAME:xxx-USERID:xxx-PASSWORD:xxx
- To start the program only by logging in and by pre-selecting a client:
  - Viewer.exe – DBNAME:xxx-USERID:xxx-PASSWORD:xxx- CODE\_P:xxx-CODE\_S:xxxx

## 29.3 General notes and daily notes

Both General notes and Daily notes are resource specific. General notes will be seen every day until they are deleted. Daily notes will only appear for that particular day.

- Notes may be entered by clicking either **General** or **Daily** on the booking screen while having selected a resource.
- To save the note, close the window and click **Yes** when prompted to save.
- The resource name in the resource list will now appear in red. To see the note, select the resource and click **Daily note/General note**.
- The resource will also be alerted of the note with an alert, either at login or on screen while working. Settings for this function are done by your system administrator.

## 30 Technical Information

## 30.1 Installation and Set-Up

For minimum and recommended client and server specifications, please refer to the Auditbase Server and Client Specification.

For full step by step guidelines on how to install Auditbase System, please refer to the Auditbase Complete Install Guide.

## 30.2 Symbols Used on the System and in Documentation

Symbols are used on the system and in the documentation in places where this is required by regulations or where it is simply more convenient due to space restrictions.

You can find an overview of the symbols used on packaging. Also, see below.



General warnings



Manufacturer address



CE

## 31 Manufacturer and System Data

The SaMD Auditbase System is manufactured and sold in the EU by:

**Head office:**

Auditdata A/S

Wildersgade 10B 1408 København K Denmark

Phone: +45 70203124

[www.auditdata.com](http://www.auditdata.com)



2003 Auditbase

**Documentation version:**

Auditbase Help System version 20.0040/34

**Symbols used on the system, its packaging, and in documentation:**

See the section "[Symbols Used on the System and in Documentation](#)" for an overview of symbols used.