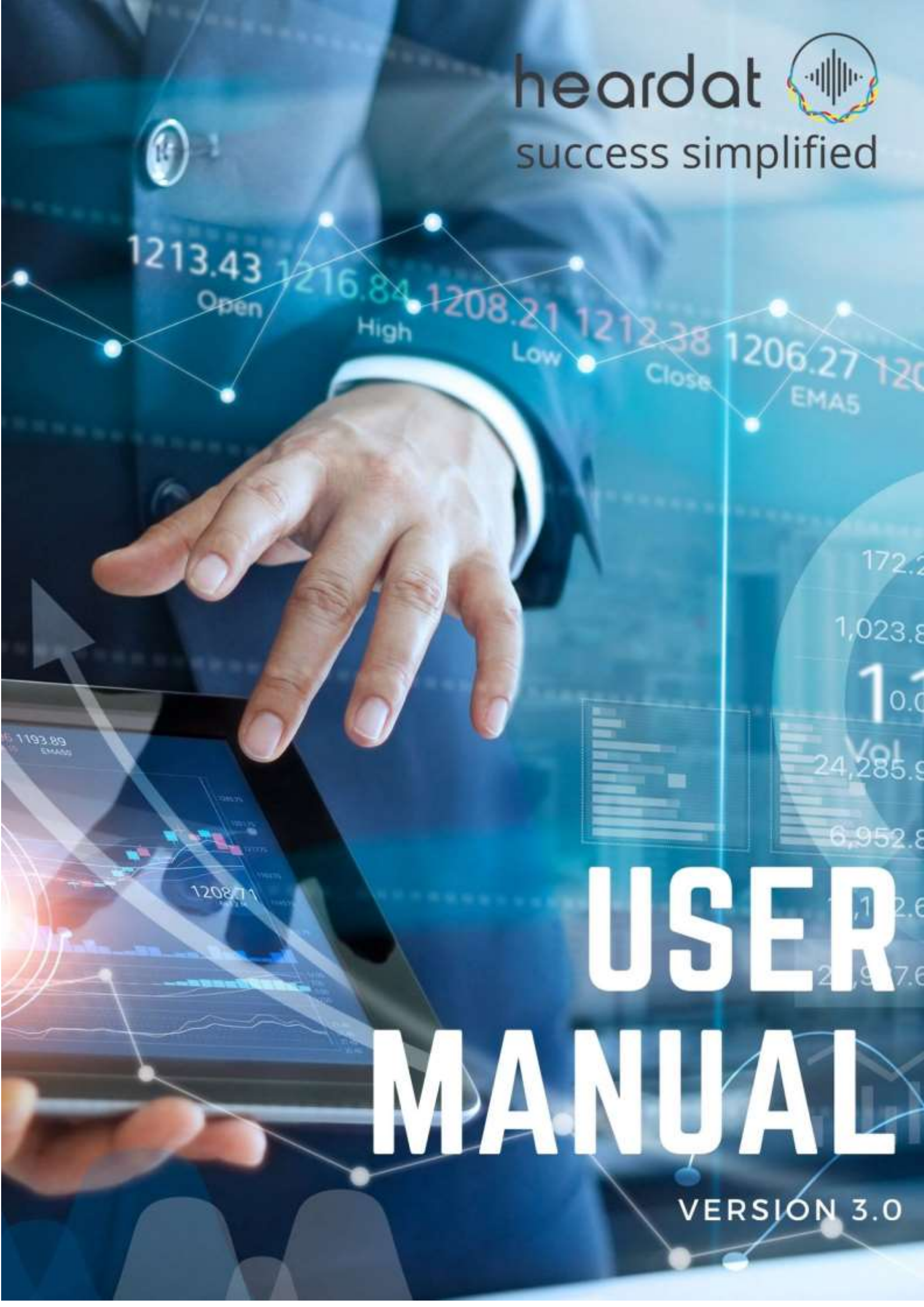
heardat

success simplified



USER MANUAL

VERSION 3.0

Contents

Introduction

Welcome to Heardat! Our passion is to ensure practice growth for you, ease processes and maximise the resources and time that you spend in your practice. Heardat truly makes working ON your practice versus working IN your practice so much easier!

Congratulations on taking this step in your practice! Ultimately, we know that you will not regret allowing Heardat to be part of your practice. We do however want you to know that Heardat is the vehicle in the practice, but we need you to drive the vehicle. We have seen significant results in practices that have truly embraced Heardat and have gotten all their staff on board. The truth about Heardat is – the more you put in, the more you get out.

Take the time to get to know and understand Heardat. When truly understanding all the functionality that it offers, you can customise it to your specific needs – because no one knows your practice and patients like you do!

The Heardat Training manual was developed to assist you with some steps in Heardat and to understand how it's functionality and all the features come together. The wonderful thing about Heardat is that it is constantly being developed, updated and improved. **This does however imply that certain aspects of Heardat is not always updated in the manual.** We will aim to keep this manual updated as frequently as possible and the latest version will always be available on the Heardat Website. Please bear with us in the case of minor discrepancies and contact us for assistance if the manual does not provide the answers you are looking for! If you do notice any discrepancies, we will also appreciate it if you could inform us so that we are sure to keep it updated!

The manual will take you through the systematic process of when a patient register at your practice for the first time and all the 'back end' functionality for you to understand. It is however worth mentioning that due to the very integrated and very complex nature of Heardat there may be 'jumping' between sections and cross referring between sections at times for effective explanation and demonstration of functionality.

1. System Requirements

1. No minimum specifications or requirements has to be met to be able to use Heardat.
2. Heardat is cloud based and simply needs a stable internet connection and an internet browser.
3. Although Heardat will work on several internet browsers, is the recommended browser is Google Chrome.
4. A designated email address is required for email communication to be sent from. This cannot be a web based email such as Gmail, but rather a registered domain linked email address such as info@abchearing.co.za.
5. It is advisable for optimal efficiency that you make use of an external mouse instead of the built in mouse/touch pad on a laptop computer for optimal efficiency.

2. User clearance levels

Heardat has been designed to have different types of users and user clearance, in order for certain individuals such as company owners / managers to see the collective detail of the practice. Certain individuals only need to see one branch's details and others need certain to see more than that. At the Owner / company manager's discretion, these privileges can be changed and assigned. The following clearance types are available:

Company Manager: This is the highest level of clearance a user of a practice can have. This gives you access to the collective company's information, settings etc.

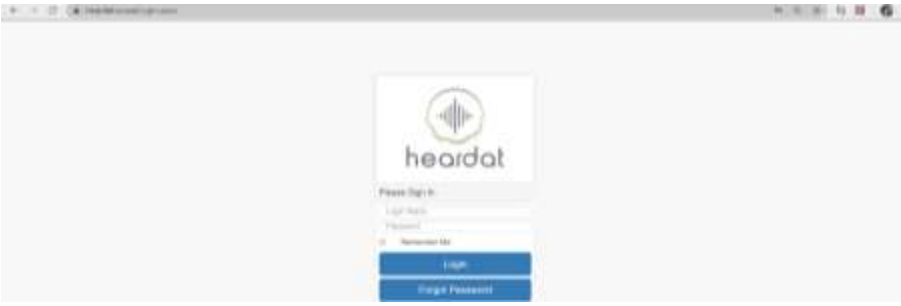
Branch Manager: This clearance level can access the specific branch's settings and patient data where the user is allocated. The same permissions as the Company Manager 's permissions but only for the specific branch where the user is assigned to.

Users: View and work with all features, only in branches allocated to them. No access to settings.

Administrator: Only Heardat's support staff is assigned at this clearance level. The user has access to all settings and patient data. The user also as has access to certain and limited back end settings

3. Login

1. To log in to your practice Heardat portal, the following link can be used: www.heardat.co.za.
2. Your login screen will display as below:

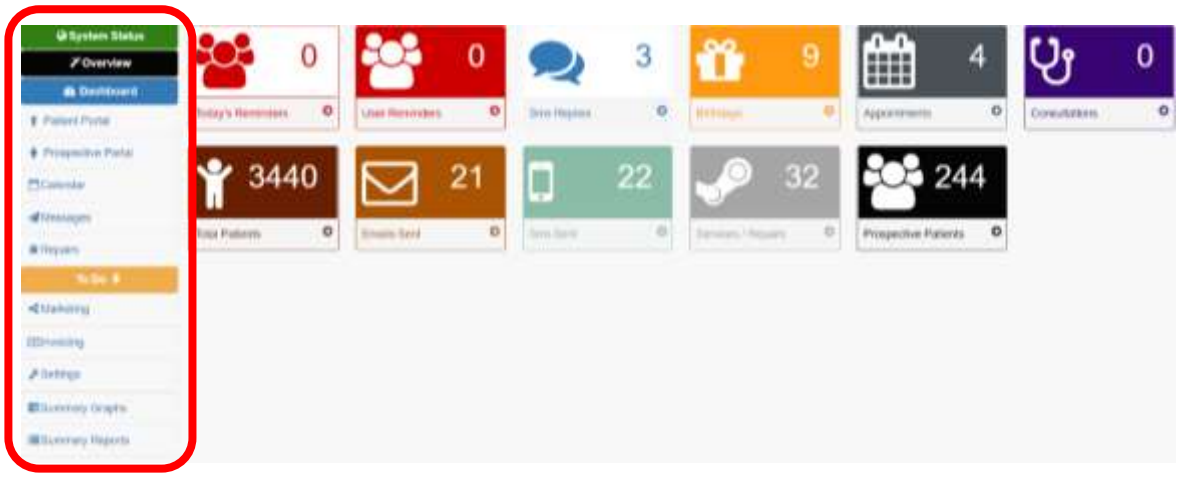


3. Enter your Login name in the first field. Field is case sensitive.
4. Enter your password in the password field. Field is case sensitive.
5. Choose the *Login* tab to continue.
6. If you have forgotten your password, click on the *Forgot Password* tab. An email will be sent to your registered email address immediately, providing you with your username and password.

When you have successfully logged in, your Heardat profile will be visible and you will see your Practice Dashboard.

4. Main menu

The main menu refers to the menu on the left hand side of the screen.



This section will give a brief overview of the purpose of each of these menu items:
Remember that it may differ depending on the user type

a. **Dashboard:** Shows an overview of the practice: The amount of patients, prospective patients, patient birthdays for the present month, communication to be sent and replies received on the communication (emails or SMS messages sent to patients). If the practice has different branches, each branch's details can appear separately as well.
b. **Patient portal:** When a patient is registered on the system and has an entry under classification or clinical diagnosis , the patient can be found under *patient portal.*
c. **Prospective portal:** When a patient is registered on the system but has no entry under classification, the patient will be found under *prospective portal* because the patient has not been diagnosed yet and can be considered as a prospective patient.
d. **Calendar:** Future appointments and the consultants who will do the examination can be found under calendar. Appointments will also mainly be made on the calendar.
e. **Messages:** When it is needed to send communication to a specific patient when you only have their cell phone number, the *messages* tab will be used.
f. **Repairs:** The *repairs* tab can be used to keep track of any repairs that has been sent for repair or servicing and to keep the patient up to date with automatic template messages sent. Please note that you do not book any devices in via the repairs portal. This will be done via the patient's profile.
g. **To do:** When the user has set items lists to remember under a specific patient after a consultation *it all displays under the 'To Do' list.* These includes *Reports* to be written, *quotations* that needs to be sent, *product information* that needs to be sent out, *orders* that needs to be done, *billing* that needs to be sent through for patients, a motivation, quotation and audiogram (*MQA*) that needs to be done, *reminders* that was set etc.
h. **Marketing:** When a custom or mass marketing message (email or SMS) needs to be sent out to a specific group of filtered patients, it is done from the marketing portal.
i. **Settings:** System 'back-end' settings are changed in the settings screen. Different clearance levels only have restricted access to certain setting features.

5. Practice Dashboard

The purpose of the practice dashboard is that it provides a summary of aspects of the practice and it provides you access (if applicable to your user clearance level) to each of your branches individually.

The Dashboard displays the following information about each branch separately as well as the company collectively:

- Total patients
- Total prospective patients
- Patient birthdays today
- Total emails sent out today
- Total SMS's sent out today

The practice dashboard displays as below (should there be more than once branch).

NOTE: Depending on user clearance (section 2) this screen might display differently.

When selecting any column on this portal it will take you to that branch (if applicable) specific dashboard with further information, alternatively, when selecting the first column, you can view the company's collective data. If you select either of the above columns, the following will display:

The fields displayed here is as follows:

1. **Today's Reminders:** View the reminders for practice / branch on the day (all the users collectively). Add some new reminder / view complete and incomplete reminders.
2. **User Reminders:** View the reminders for practice / branch for your specific user. Add some new reminder / view complete and incomplete reminders.
3. **SMS Replies:** View today's SMS replies and view the SMS reply history.
4. **Birthdays:** View the patients who have their birthday today and their age.
5. **Appointments**: View the active view of the present day's calender to see the appointments of the day. calendar / appointments for the day
6. **Consultations:** View a list of consultations that was done on a specific day (use search function to select specific other days).
7. **Total Patients:** View all the patients registered and filter the following possible fields according to your preference:
   - *Patients from a specific branch*
   - *Patients referred by a specific professional*

- *Patients with specific classification*
- *Patients with specific hearing aid technology levels*
- *Patients with specific hearing aid models*
- *Patients using a specific hearing aid brand*
- *Patients on a specific medical aid and medical aid plan*
- *Patients referred by specific media*
- *Search according to date registered at the practice (not last consultation)*

8. **Emails sent:** Emails sent & scheduled today as well as email sent history – also check status of emails and preview the emails to be sent out.
9. **SMS Sent:** SMS sent & scheduled today as well as SMS sent history – also check status of SMS's
10. **Service / Repairs:** All current services / repairs in progress as well as where it is in the process. outstanding as well as the progress thereof
11. **Prospective Patients:** View all the prospective patients registered and filter the following possible fields according to your preference:
    - *Patients from a specific branch*
    - *Patients referred by a specific professional*
    - *Patients with specific classification (not clinical diagnosis such as ICD10 codes)*
    - *Patients with specific hearing aid technology levels*
    - *Patients with a specific hearing aid model*
    - *Patients using a specific hearing aid brand*
    - *Patients on a specific medical aid and medical aid plan*
    - *Patients referred by specific media*
    - *Search according to date registered at the practice*

When selecting either of the options above it will direct you to the appropriate screen relevant to the aspect in the block where you want to action the following step.

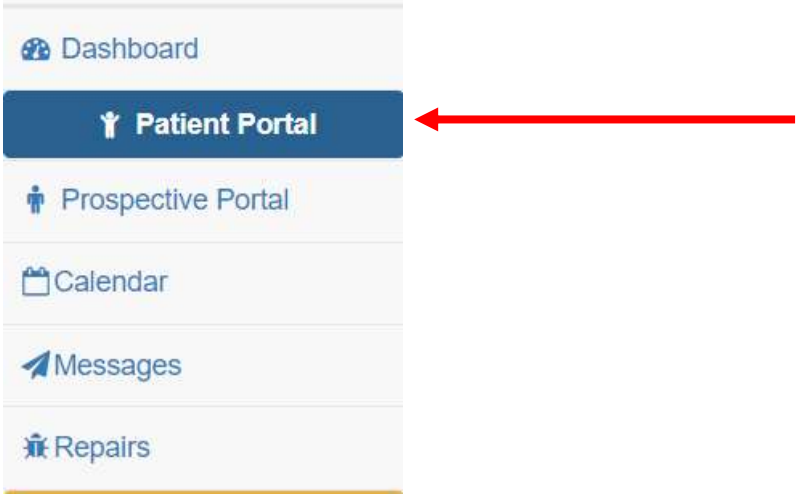
6. Patient portal

The patient portal contains the list of the patients that has an entry under classification or clinical diagnosis. This list displays a few summarized items pertaining to the patient (*such as age, ID number, cellphone number, email, branch, classification, medical aid, last visit and language*). From this portal, a new patient can also be added.

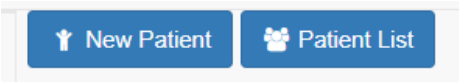
6.1 How to add a new patient:

- **A patient can be added in one of 3 ways:**
  - When an appointment is made, an SMS goes out with a link the patient can use to update his details. This patient (with the updated details) can then be found under prospective portal
  - When a practice has a tablet in the practice, the patients can register themselves via the register link when they come in for their appointment
  - You can insert and edit a patient manually.
- **Insert a patient manually:**

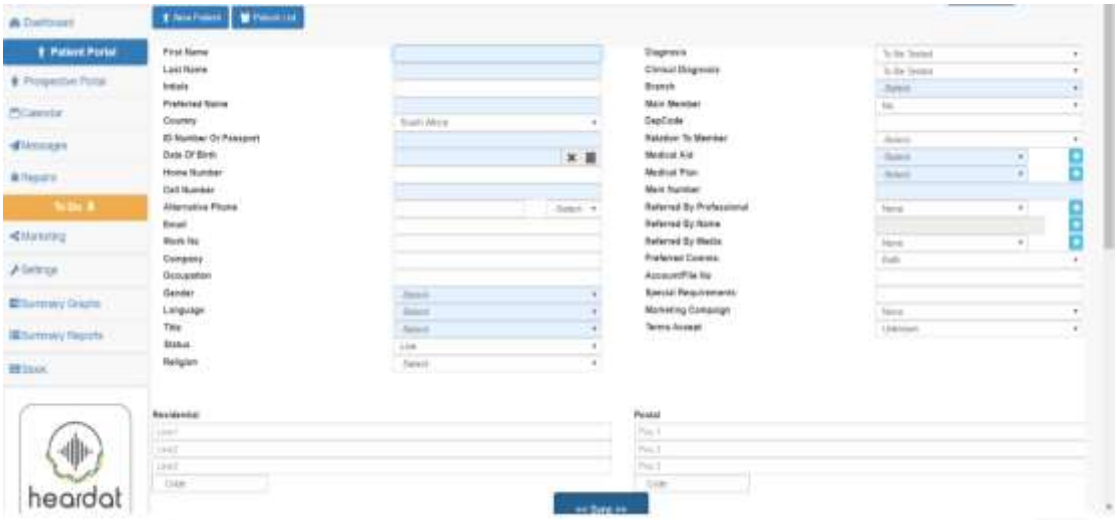
6.1.1 Select the 'Patient Portal' option on the tab on the left-hand side of the screen.



6.1.2 Select 'New Patient' on the top left of the screen.



The screen should now look like the following:



6.1.3 Insert the information relevant to the correct field required (***NOTE**: Some fields are mandatory , and if not complete the patient entry will not be saved*). Fields are explained in more detail below.

a. **First name:** Enter the patient's full names (first, second, third name etc)
b. **Last name:** Enter the patient's surname.
c. **Initials:** Enter the patient's initials.
d. **Preferred name:** Enter the patients preferred name or nickname. (When communication goes out, you would like to address your patient on his/her nickname, thus this field is extremely important.
e. **Country:** Enter the patient's country of residence.
f. **ID number or passport:** Enter the patient's ID number or passport number. (If the full ID number is not available the first 6 digits - date of birth can be used with 7 zero's after as a temporary solution, alternatively, the cellphone number can be used temporarily. A unique

Id Number (identifier) is essential, since it is the only wat that the system can distinguish between patients to prevent duplicate patient entries.

g. **Date of birth:** The date of birth should be entered at the default when the correct ID number is entered in the previous category. In the case it isn't, enter the birth date by selecting the correct date.
h. **Home number:** If there is a different number from the cell phone number provided, enter this here. *Optional but recommended field.*
i. **Cell number:** The patient's cell phone number should be entered here. There should be no spaces between the digits because the system only picks up the one format.
j. **Alternative phone:** An alternative or next of kin number to contact the patient when the patient is not reachable. Next to this field there is a 'select' tab to select the relationship of the alternative contact to the patient.
k. **Email:** Enter the patient's email address. Encourage them to supply this to you since it will improve your communication with the patient significantly.
l. **Work no:** In the event a patient is occupational, the *work no* is the telephone number of the patient's occupational workplace.
m. **Company:** Enter the name of the patient's company of employment.
n. **Occupation:** Enter the patient's current occupation.
o. **Gender:** Enter Male / Female where possible. This is essential because when communication is generated, the correct title needs to be displayed in communication and can only be done correctly or allocated correctly when gender is chosen.
p. **Language:** Select the patient's preferred language, since all communication will be sent out in the language selected. (In the case that a patient chooses a language other than one you are proficient in; English or Afrikaans still needs to be selected here).
q. **Title:** Select the patient's preferred title for purposes of communication to be sent out.
r. **Status:** Indicates whether or not patient is alive or deceased. When adding a new patient this tab will default to alive. (This is where you can change the patient status if the patient were to pass away).All scheduled communication will be cancelled immediately, and any future communication will be blocked.
s. **Religion:** If you choose to specify the religion of the patient that you add, you have the capability to send religion specific communication on religious holidays.
t. **Classification:** When entering a new patient, this field will default to "To be Tested" and has to be left this way. This will automatically change as soon as the first consultation is logged. (The purpose of this field is to classify your patient to send out correct marketing messages to him/her).
u. **Clinical diagnosis:** When a patient is uploaded, this field will default on "To be tested" and has to be left this way. This will automatically change as soon as the first consultation is logged.
v. **Branch:** In the event a practice has different branches, choose the applicable branch where the patient is seen. If your practice has one branch only, it is still necessary to select the branch for the patient profile to be saved.
w. **Main member:** Add the medical aid *main member in the case of a medical aid*.
x. **Dep code:** Enter the medical aid dependent code.
y. **Relation to Member:** Choose the relation of the patient to the main member.
z. **Medical Aid:** Choose the medical aid scheme the patient is with; in the case that a patient has no medical aid, choose the *private* option.
aa. **Medical Plan:** Choose the applicable medical aid plan the patient is subscribed to.
If initially medical aid was selected as *private* you will not be able to choose an option at medical plan.
bb. **Mem Number:** A patient that has a medical aid should have a medical aid member number. Enter the member number under this category. ***NOTE:*** When a patient does not have a medical aid and the *PRIVATE* option is chosen at *Medical Aid*, you will not be able to insert a member number.

cc. **Referred by Professional:** If a patient has been referred by any professional, the name can be selected from the dropdown list. If the name is not on the list yet, click on the blue plus sign after the block and add the professional details. If a patient was not referred by another professional leave this field on *none*. When a consultation is logged, this professional will receive thank you communication for referring the patient.

dd. **Referred by name:** If the patient was referred by any one of your current patients (word of mouth), select this patients name in the dropdown list. If this is not applicable – leave the field as *none*. This patient will receive thank you communication for referring this patient.

ee. **Referred by media:** Select how the patient came to hear about your practice – if not referred by a professional or friend. Examples are: Website, newspaper, notice boards, advertisement campaign etc.

ff. **Preferred comms:** This option is used to choose the patient's preferred method of communication. There are several options:

   a. ***None:*** When the patient prefers no communication
   b. ***Email:*** When the patient prefers to be contacted via email
   c. ***SMS:*** When the patient prefers to be contacted via SMS
   d. ***Both:*** When the patient wants to be contacted via SMS **and** email
   e. ***Blocked:*** When the patient unsubscribed from receiving all and any communication from the practice

gg. **Account file No:** The file numbering system used by the company. The file chosen or allocated by the practice can be stored here.

hh. **Special requirements:** Any special requirements or needs can be noted in this field. Examples can be: Wheelchair / Bland patient / Sign language etc.

ii. **Marketing campaign:** When your company runs a marketing campaign such as a special offer, an additional marketing campaign can be added. If a person then comes in, the campaign can be chosen. If there was no specific additional marketing campaign, leave this field at none. The marketing campaign can be edited under settings. The marketing campaign can also be chosen when a consultation is loaded.

jj. **Terms accepted:** In the event the company has terms & conditions regarding payment/ medical aids / policies, it can be indicated whether or not the patient has accepted these terms in this category. The terms and conditions will also include that the patient will receive electronic communication and that he/she can refrain from receiving this communication at any point. Should the receptionist select this choice herself, a signed copy must be loaded on the system.

kk. **Residential address:** the residential street address of the patient must be entered under this category. The postal code of the area must also be filled in.

ll. **Postal address:** When the postal address is the same as the residential address, select the << *Sync* >> tab between these two categories. The residential address will be pulled through to the postal address field.

Patient information has been entered and the patient has been added, but not saved. After all the details have been inserted, click *Save*.

i. Save

This option saves the patient's details and the patient will be registered on the system. No communication will be sent out when selecting SAVE. The following screen will pop up after saving:

In this popup screen you can add a referral letter by clicking on the '***referral letter***' tab.

When selecting the second tab '***Add New Patient***' a new blank profile will refresh, ready to load a new patient profile.

The patient is now registered and saved on Heardat. You will not be able to find the patient under patient portal unless you changed the classification. You can find this patient in the '***prospective portal***'.

6.2 How to view, edit or action a patient's details:

6.2.1 Select Patient portal

6.2.2 Select the Patient List tab on the top of the screen

6.2.3 Use the search bar as shown below to search for the patient in question.

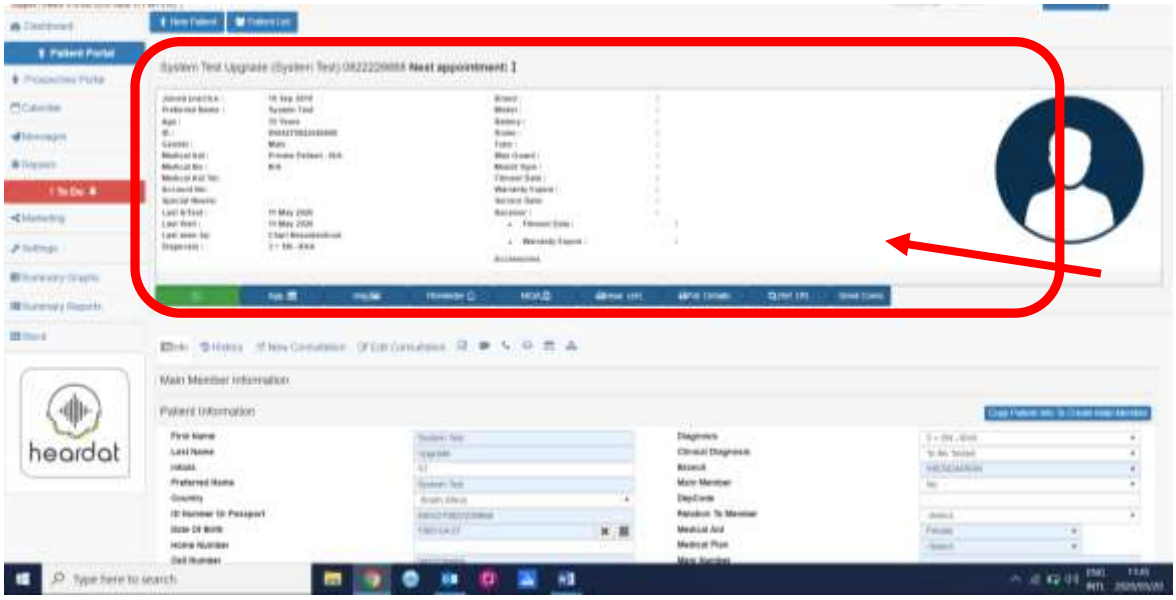
6.2.4 The following search criteria can be used:

- *Name*
- *Surname*
- *Cell phone Number*
- *ID Number*
- *Email*
- *File number*

6.2.5 Select the patient who needs to be viewed or edited or actioned. The screen will appear as below:

Basic patient info as entered in section 6.1 can be viewed and edited in the bottom half of the screen. Remember to select ***'Save'*** after making changes.

The top half of this screen is referred to as the patient dashboard and the next section will explain which actions can be taken from the patient dashboard:



6.3 Main Member Information

In the patient information screen, you will see a tab above the patient information for main member information. This is to be used should the main member and patient information differ.

Patient information can be copied to main member information by selecting the tab on the far right. If this option is used, complete the fields in the main member section that differs from the patient information section. Remember to save changes.

7. Patient Dashboard

The upper half of the screen is referred to as the **patient dashboard**. Various actions can be completed from the patient dashboard, using the following tabs:

7.1 Sending a WhatsApp message to a patient

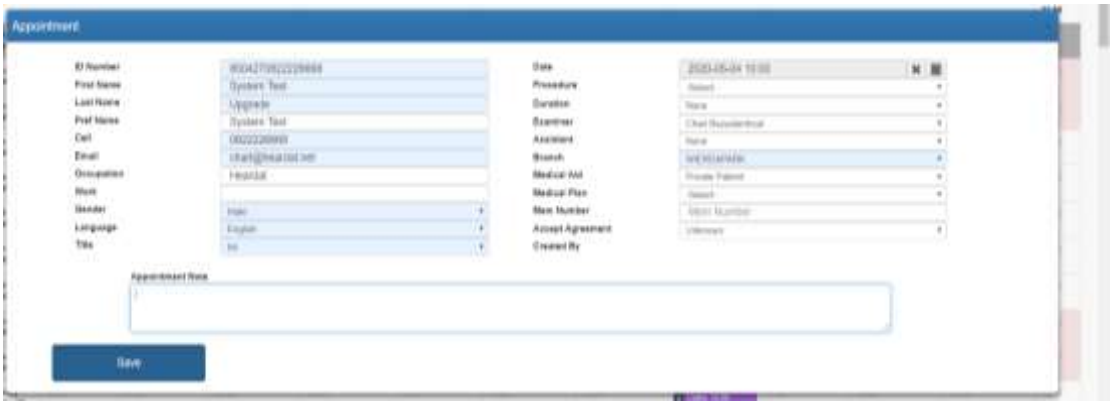
(Kindly ignore this section for the time being, since the WhatsApp functionality is in the process of being refined)

7.2 Scheduling an appointment from a patient's profile

If a new appointment needs to be scheduled for this patient, select the 

tab. The calendar will open in a new tab on the browser as follows: (*Remember to enable popups*)

You can choose the display to be active / day / week / month. Click on a time slot on the calendar and a screen will open as below:



7.2.2 Patient information is in the first column and automatically pulls through from the patient profile. The second column needs to be edited according to the appointment needs:

a. **Date:** Choose a date and time for the patient appointment. You can access 30 minute intervals by clicking on the hour after you chose a date.
b. **Procedure:** Choose the procedure the patient requested, e.g. a hearing test (These procedures are set up in the settings screen and can be amended to your practice's needs).
c. **Duration:** Complete the desired duration of the procedure. This can also be set to a default under settings.
d. **Examiner:** Choose the examiner who will perform the procedure of this patient (These examiners are set up in the settings screen by the Heardat support team).
e. **Assistant:** In the event an assistant is needed, choose the person who will assist the examiner during the procedure. The assistant is one of the users on the system and also set up in the settings screen by the Heardat support team.
f. **Branch:** Choose the applicable branch where this procedure will be performed.
g. The patient's applicable medical details are completed by default.
h. **Appointment note:** In the event it is needed to make an extra note for the appointment, it can be made in the box.

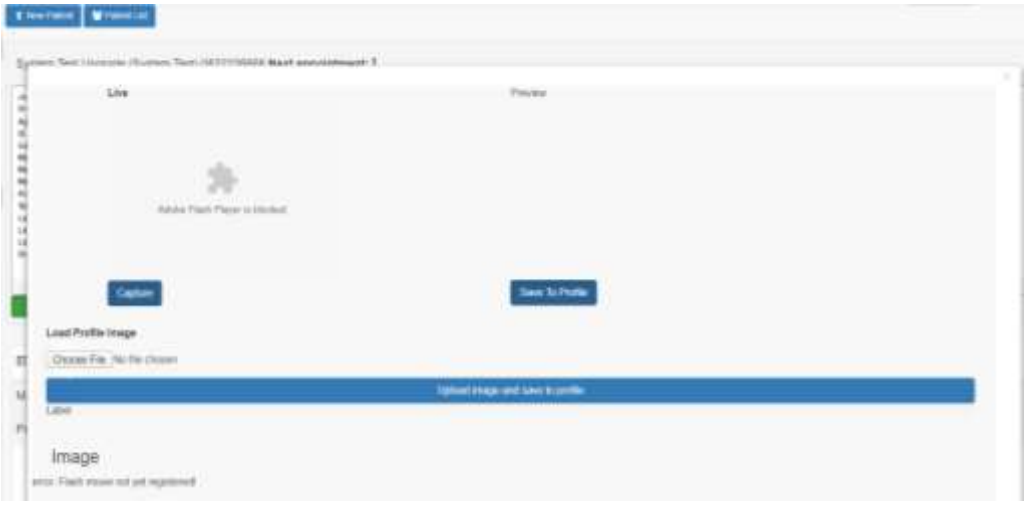
Save: Select this tab to save the appointment made.

The tab in which the calendar opened will auto-close after saving and your screen will then revert back to the patient portal.

7.3 Saving a picture on a patient's profile

When a photo for the patient has to be saved, select the. 

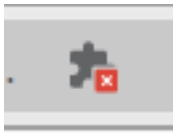
option. The following screen will appear:



There are 2 ways to upload images to a patient's profile:

7.3.1 Capture an image

In the case that you see the following: ***Adobe Flash Player is blocked,*** check on far right hand corner of your browser if you see the following:



Click on this icon and allow the use of the flash player on this site.

If the following message appears: ***Click to enable Adobe Flash Player***, click on the message.

The following message will appear:

Select ***allow***.

Select ***allow.***

Click on capture on the left, the image will display on the right. If you want to recapture the image, click on capture again, until you are happy with the image on the right. Select ***save to profile*** to upload to the patient profile.

7.3.2 Upload an image

- Select Choose File

- The chosen file will appear next to the ***Choose File*** button
- Select Upload image and save to profile

7.4 Setting up a reminder regarding the specific patient

7.4.1 When a reminder for the practice about the patient has to be set, choose the *Reminder option:* 

7.4.2 Insert the date and time for the reminder to be sent to the user who needs to attend to a certain task regarding the patient.

7.4.3 Insert the reminder note of the task that has to be done. what you want to be reminded of.

7.4.4 Choose the importance of the priority of the reminder.

7.4.5 Select whether or not you want this reminder to be sent to all the users in the practice

7.4.6 Select the primary receiver of the reminder

7.4.7 Select who else to send the reminder to. If there isn't another user that needs to receive this reminder, it can be left on 'select'

7.4.8 *Save* the reminder

7.4.9 A message will briefly appear "Successfully saved", and will fade out & auto-close. ***NOTE:*** This reminder will appear under your to-do list and you will receive an email about the reminder. If this task is not attended to, your "to-do" tab will flash until you attend to the task.

7.5 MQA (Motivation, Quotation Audiogram)

The purpose of the MQA sequence function is firstly to keep track of the progress or workflow of the Authorisation requested for hearing aid funding purposes. Secondly, this function communicates with the patient involved (should you choose to). Thirdly, this functionality adds an item on your to do list which ensures that you are reminded to follow up with medical aids.

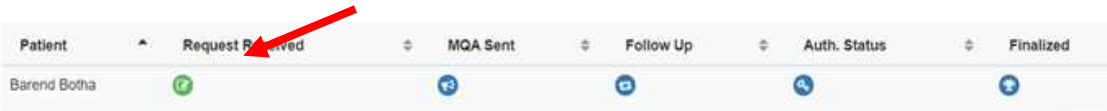
7.5.1 MQA Sequence

Step 1: Request MQA

When an MQA (Motivation, Quotation and Authorisation) has to be requested, use the *Request MQA* tab (*The MQA Sequence can be initiated from a different location as well*).

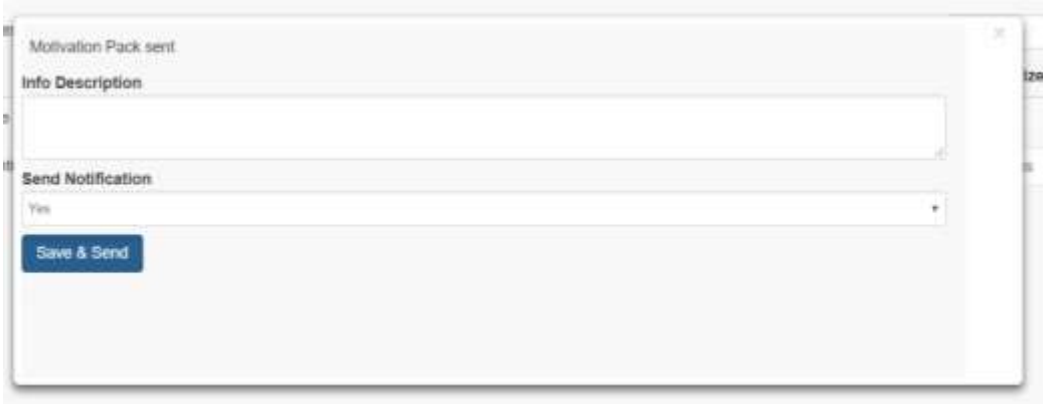
Select the *Request MQA* option

As soon as the request MQA option has been selected, the MQA sequence has been activated and it will display on your *To Do list*. Whenever the MQA option is selected from the patient dashboard, the following will display – the last green button indicated where in the process this patient's MQA is.



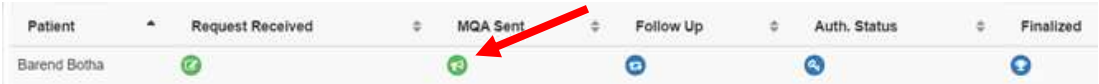
Step 2: Send MQA

Select the *MQA Sent* icon as soon as the MQA documents has been sent to the medical aid: The following screen will appear:



a. **Info Description:** Put a description or note for yourself in the Info Description field (optional)
b. **Send notification:** Select yes if you want the patient to get a standard pre-set message to inform them that the MQA has been sent. Select no if you do not want any communication to be sent out.
c. **Save and send:** Click here to save this step and close the screen

The following will display – the last green button indicates where in the process this patient's MQA is.



Step 3: Follow up

Select the Follow Up button every time that a follow up was done with the medical aid: 
The following screen will appear:

a. **Info Description:** Put a description or note for yourself in the Info Description field (optional). Note that the patient will not receive this Info Description in communication set to be sent out.
b. **Send notification:** Select yes if you want the patient to get a standard pre-set message to inform them that the MQA has been sent. Select no if you do not want any communication to be sent out.

c. **Save and send:** Click here to save this step and close the screen

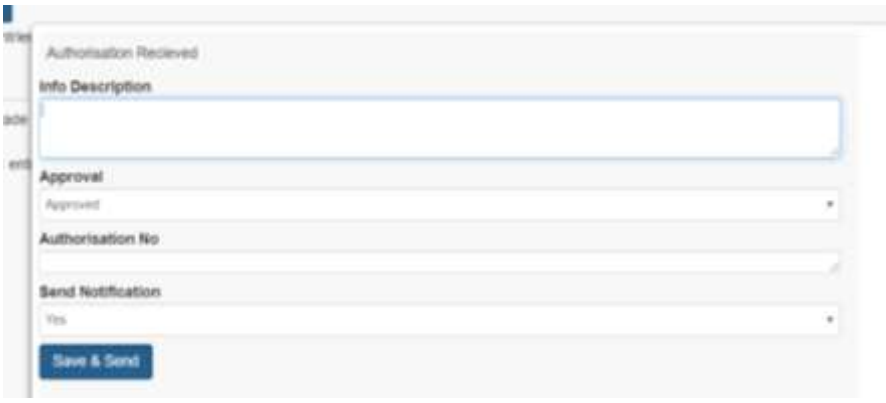
The following will display – the last green button indicated where in the process this patient's MQA is.

NOTE: This is the only step in the MQA sequence that can be repeated as many times as necessary, since you might need to follow up on an MQA submission more than once before approval is granted.

Step 4: Authorisation Received

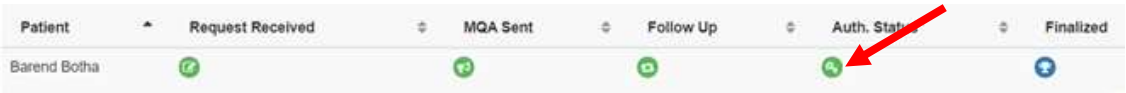
Select the *Auth. Status* button when you have received authorisation. 

The following screen will appear:



a. **Info Description:** Put a description or note for yourself in the Info Description field (optional). The patient will not receive this note in any communication.
b. **Approval:** Choose whether the authorisation has been approved or declined.
c. **Authorisation No**. Enter the authorisation Number if applicable
d. **Send notification:** Select yes if you want the patient to get a standard pre-set message to inform them that the MQA has been sent. Select no if you do not want any communication to be sent out.
e. **Save and send:** Click here to save this step and close the screen
f. **Send notification**: Select yes if you want the patient to get a standard pre-set message to inform them that the practice has received an authorisation.

The following will display – the last green button indicated where in the process this patient's MQA is. ***NOTE:*** when authorisation has been obtained and you selected 'approved' in the screen the Auth Status icon will turn green.



Whenever it has not been approved and you chose 'declined' in the pop up screen it will display red:

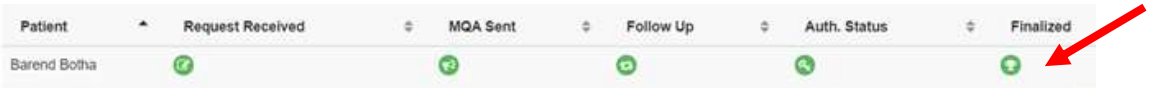
Step 5: Authorisation Finalized

Select the *Finalized* icon when the MQA is finalised. 

The following will display:

a. **Info Description:** Put a description or note for yourself in the Info Description field (optional). The patient will not receive this note in any communication sent out.
b. **Send notification:** Select yes if you want the patient to get a standard pre-set message to inform them that the practice has finalised the MQA. Select no if you do not want any communication to be sent out.
c. **Save and send:** Click here to save this step and close the screen

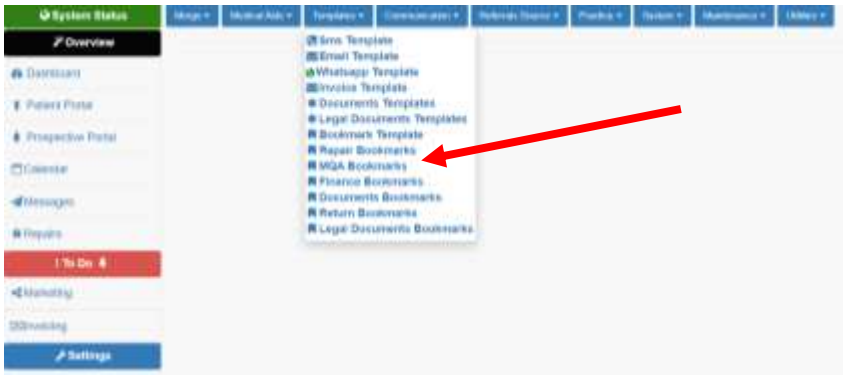
The finalised MQA sequence screen will display as follows:



7.5.2 Changing the MQA bookmarks

MQA bookmarks are pre- set communication that is sent out for every step of the MQA process. This communication can be set up in *settings* > *templates*> *MQA bookmarks.*

a. Select the *MQA Bookmarks* option



b. Select the branch where bookmarks are being changed.
c. Select the communication that has to be sent out with each bookmark under email.
d. Select the communication that has to be sent out with each bookmark under SMS.
e. Select a category for the messages to fall under for when patient wants to opt out from receiving certain communication.

i. *Save* the changes made.

7.6. Printing an Insurance Certificate

This functionality will only work if hearing aid information has been entered into the patient dashboard already.

a. Select the *Insur. Cert.* option.

b. Enter the applicable replacement value amounts to the applicable fields – Left side and Right side. If the person only uses a hearing aid unilaterally, just enter the applicable field.
c. Select *Print.*
d. If nothing happens after you selected *Print,* there should be an icon with a red cross on the right hand side of the browser.
e. Select this icon and choose the option that allows Heardat to open pop-ups
f. Repeat steps **7.5.3a – 7.5.3c**
g. A pop-up screen will open up and give you the option to print the document, you can also save the document as a PDF.
h. When the document is printed, close the tab.
i. You can also send an insurance certificate directly from Heardat:
   - After the steps above are completed, you can find the insurance certificate under the patient's files.
   - 

     This is how the file will display
   - To send the insurance certificate to a patient, click on the far right icon.
   - An email set up will then be sent to the patient including the insurance certificate.

7.6.1. Setting up an insurance certificate to send out:

- Set up the content on Microsoft Word (be sure to use the correct keywords)
- Save the file as a webpage
- Export the data onto Heardat
  - While the Microsoft webpage is open, right click on the page and choose "View page source"
  - Select all the content (Ctrl + A)
  - Copy the content (Right-click and select "Copy" or Ctrl + C)
  - Open Heardat and go to Settings > Templates > Documents Templates
  - Insert the name of the insurance certificate (eg. Insurance Certificate PDF)
  - Paste the content you copied into the space provided (English template and Afrikaans template)
  - Click "Save"
- Go to Bookmarks > Documents Bookmarks

- Select the branch you want to set the template up for.
- The second dropdown on this screen is “Insurance Certificate PDF”. Select the template you just loaded on the system.
- Click “Save”

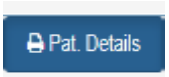
An email has to be set up for this insurance certificate to be sent out

- Set up an email in MailChimp the patient will receive to download the insurance certificate
  - In this email, be sure to include the keyword: @FileDownload. It will include a link to download the insurance certificate.
- Export the mail onto Heardat:
  - Export the mail from mailchimp
  - Open the downloaded email
  - Right click on the page and choose “View page source”
  - Select all the content (Ctrl + A)
  - Copy the content (Right-click and select “Copy” or Ctrl + C)
  - Open Heardat and go to Settings > Templates > Email Templates
  - Insert a name for the email (eg. Insurance Certificate Download)
  - Paste the content you copied into the space provided (English template and Afrikaans template)
- Go to Bookmarks > Bookmark templates
- Select the branch you want to set the email up for.
- At the bottom of the screen choose the applicable mail under the “Insurance Certificate” dropdown
- Click *Save*

7.6 Printing patient’s details

When the patient’s details need to be printed:

a. Choose the *Pat. Details* option.



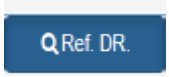
b. If the site doesn’t redirect, remember to enable the site to open pop-ups (Steps 7.5.3d – 7.5.3f)

c. A pop-up site will open up and give you an option to print the patient’s details; you can also save the document as a PDF.

d. When the document is printed, close the tab.

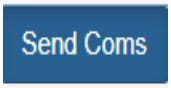
7.7 Ref. DR tab

The Ref. DR tab on the patient dashboard has the main function of being a quick search tool to find the contact details of a referring professional.



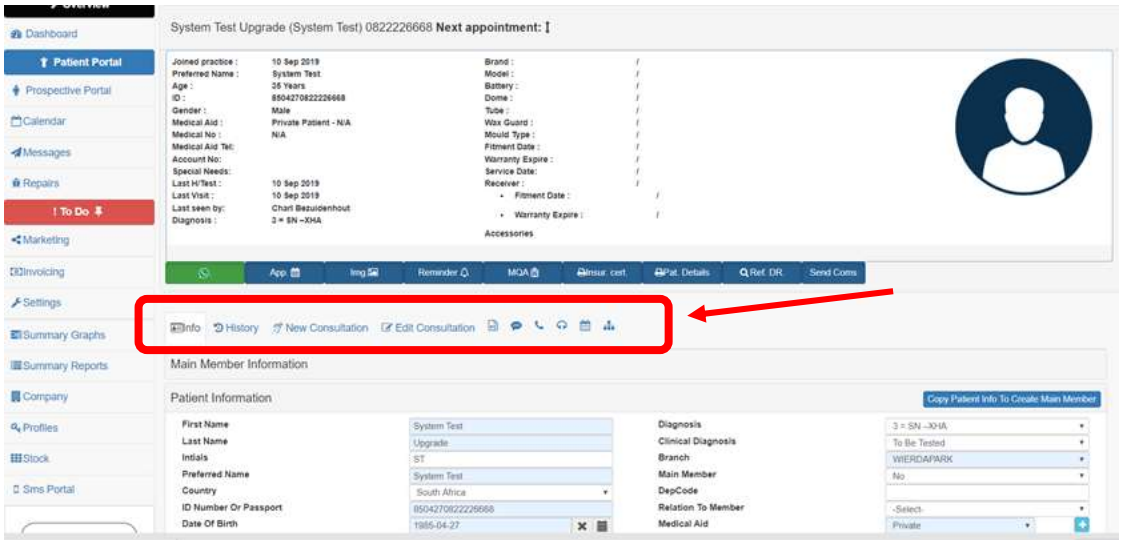
7.8 Sending a message to a patient

When a specific message has to be sent from the patient’s profile , select the *Send Coms* option and send the selected template that you want to send out or type the message and send.



8. Action tabs

The following tab will be visible just below the initial blue tabs in the patient dashboard as mentioned above:



8.1 Patient information – view / change

The *info* option, displays all the patient's information and details. Details can be viewed or changed in this tab.

8.2 History

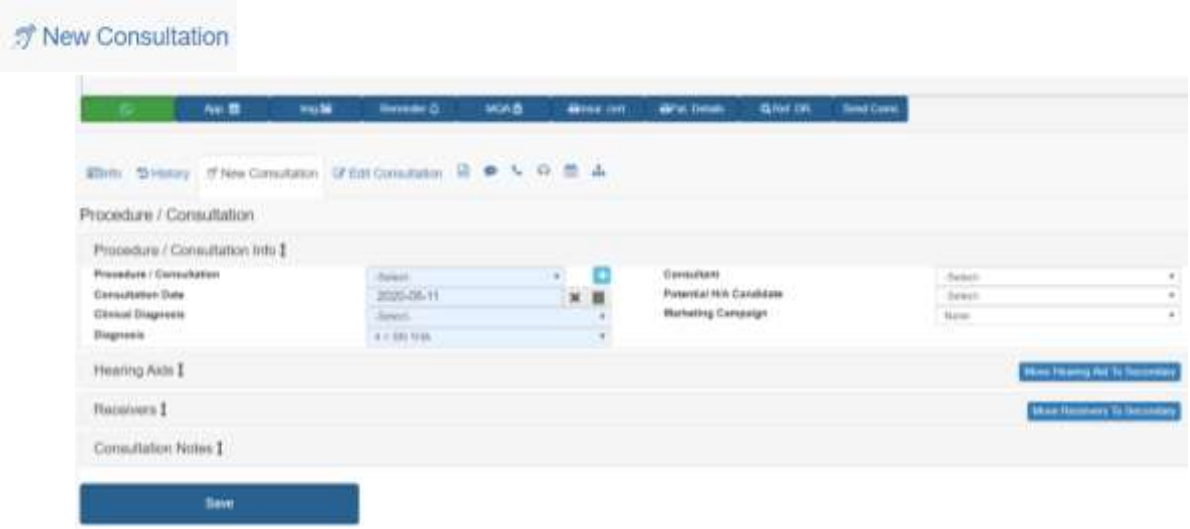
The *history* option displays the history log of the patient's profile, including appointments, communication sent and services/repairs.

8.3 Log Consultations

All consultations & procedures should be logged. This is essential, because communication is linked to consultations to nurture the patient.

8.3.1 New Consultation

Enables the examiner to insert the details of the consultation performed on the patient.



a. Insert the procedure performed by the examiner (This list of procedures are set up in the settings screen).
b. Select the consultation date and time.
c. Choose the applicable ICD-10 codes under clinical diagnosis from the dropdown list.
d. Select the classification as used for Heardat purposes by your company.
e. Choose the consultant who performed the procedure (consultants are users that has been set up in the settings by Heardat support).
f. Should the patient be a potential hearing aid candidate, choose the reason applicable to him/her.

The motivation for the potential hearing aid candidate functionality is the following: When inserting this "reason" – you automatically activate a sequence of communication that will be sent to this patient. For instance, if the reason for not having a hearing aid is financial. Linked to this 'reason' or classification is a set of communication that might be directed at providing financing solutions, special offers of hearing aids etc. Options are determined by your company and can be edited:

To edit the reasons listed under ***Potential Hearing Aid Candidate***, go to Settings:

- select the *System* tab
- select *Potential Hearing Aid Groups*
- At the top of the new screen, there will be an *open field "name''*. Insert a potential reason as to why the patient does not have a hearing aid.
- Choose templates in the applicable communication fields and choose the timeline of the communication
- Select the applicable branch where you want patients to receive this communication.
- Insert a classification of messages so that when a patient wants to opt out, they only opt out for this type of communication.
- Save the changes that were made

Under Potential Hearing aid candidate, marketing campaigns are listed. If a patient came back to you after running a specific marketing campaign and you want to measure the success of this campaign you should choose the applicable marketing campaign in this option. *Read more about marketing campaigns.*

Basic consultation information has now been entered. From here you can go on to add hearing aid information or receivers or consultation notes before you save the consultation.

8.3.2 To add hearing aids to a patient's profile

Click on the *Hearing Aids* tab underneath *New Consultation.*

Left ear

- Choose the applicable hearing aid level of the patient (Currently classified as top range, mid-range, entry level, paediatric & power)
- Select the hearing aid brand used
- Select the model of the hearing aid in question
- Select the hearing aid style
- Select the colour of the instrument
- Select the battery used in the specified instrument
- Select the slimtube used – if it is applicable
- Does the patient use a concha grip / concha lock with their slim tube / receiver?
- Select the dome brand, type and size used
- Select the brand and type of waxguard used with this instrument
- If the patient uses a mould, choose the mould type
- Select the mould material of the mould used, if applicable
- Select / specify the vent size of mould
- Does the patient use a magnet for phone purposes?
- Select the person/ practice who provided the instruments – if known. If you fitted them, choose your company name.
- Insert the fitment date of the hearing aid
- Insert the serial number of the hearing aid – if not known, you can use 0000000 or UNKNOWN
- Insert the next service date that the instrument needs to be serviced (it can also be changed here if in future you want to change your service dates)
- Insert the warranty expire date – ***ensure accuracy***!

Right ear

- If the right ear has the same brand/model as the left ear, click on the *Copy to Right >>* bar and ensure that the selected items are the same in all fields applicable. Add the serial number, since the serial number cannot be the same – it will copy the following to the other side under serial number: 000000000.
- If the instruments differ significantly, repeat steps used to load left ear with the right ear.

***Please note that the style of the hearing aid is a whole different category than the model. When contacting Heardat Support to add a hearing aid to the system, please don't include the style in the model name.**

When a hearing aid needs to be loaded, the following information is needed:

- **Hearing aid brand**
- **Hearing aid model**
- **Hearing aid operational level (Top Range, Mid Range, Entry Level, Power, Paediatric)**

8.3.3 To add receivers to a patient's profile

Should a patient be making use of a RIC/ RIE / RITE instrument with a detachable receiver and you want to specify receiver length and strength, this is where this data is entered and stored. If not applicable skip this step and move to the next.

Click on the *Receivers* option found underneath *New Consultation and Hearing Aids*

Left ear

- Choose the brand of the applicable receiver

- Choose the model of the applicable receiver
- Choose the length of the applicable receiver
- Choose the power of the applicable receiver
- Insert the fitment date of the receiver (typically the same as the instrument)
- Insert the serial number of the receiver (if applicable)
- Insert the service date of the receiver (if applicable)
- Insert the warranty expiry date (if applicable)

Right ear

- If the right ear has the same brand, length, strength receiver as the left, it can be copied over from the left ear
- If it's not the same, repeat left ear steps with the right ear

8.3.4 Consultation Notes

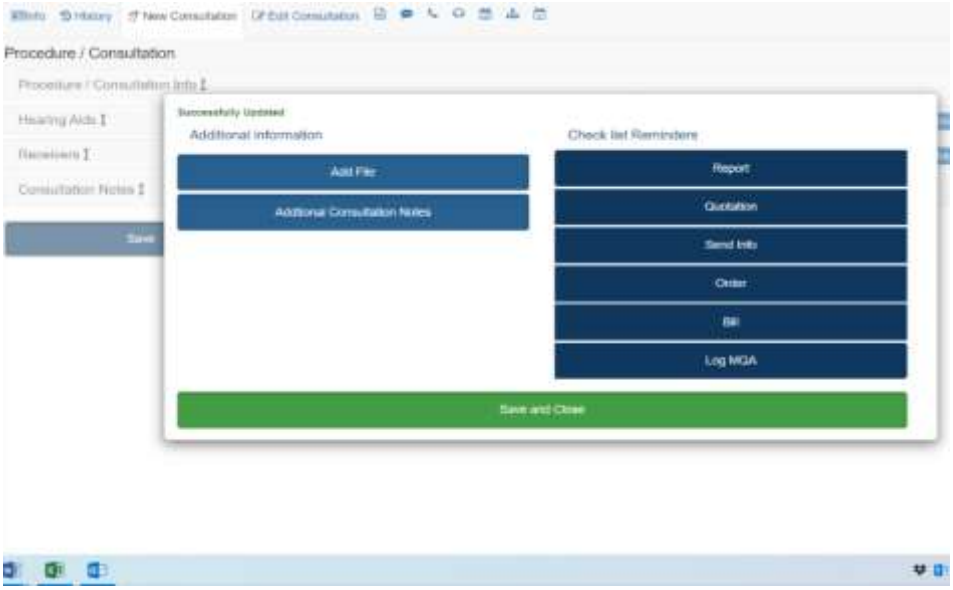
An empty field is available to make any clinical / consultation notes pertaining to the specific consultation.

8.3.5 Finalizing a consultation log

When **Procedure / Consultation Info**; **Hearing Aids**; **Receivers** and **Consultation Notes** has been completed – click on the SAVE button at the bottom. If all required fields were completed the following screen will display (If not, check whether all compulsory fields have been completed):

The following can be done through this pop-up screen:

a. **Add File**: Add any file specifically applicable to the consultation being saved
b. Additional Consultation Notes: Add additional notes for this consultation specifically, if you neglected to do it in the initial screen or if you want to add notes
c. **Check list Reminders:** The purpose of these items is the following: They are linked to your to-do list. When the user has set checklist reminders under a specific patient after a consultation *it all displays under the 'To Do' list.* These includes *Reports* to be written, *quotations* that needs to be sent, *product information* that needs to be sent out, *orders* that needs to be done, patients that has *billing* that needs to be sent through, a motivation, quotation and audiogram (*MQA*) that needs to be done, *reminders* that was set etc.
    - **Report** – Complete the field if you want to list that a report needs to be done.
    - **Quotation** – Complete the field if you want to list that a quotation needs to be sent out
    - **Send Info** – Complete the field if you want to list that specific information needs to



be send to this patient

- **Order** – Complete this field if there is anything specific that needs to be ordered for this patient specifically.
- **Bill** – Complete this field to remind yourself to do the billing / invoicing for this patient.
- **Log MQA** – Click on this field to initiate the MQA sequence

Save and Close: Click on Save and Close when you are done completing all relevant fields. This screen will auto close.

8.4 Edit Consultation

When you want to edita consultation, or information added that was left out, the consultation can be edited.

8.4.1 Click on ***Edit Consultation*** and a screen will open where you can view previous consultations logged and edit the most recent one. :

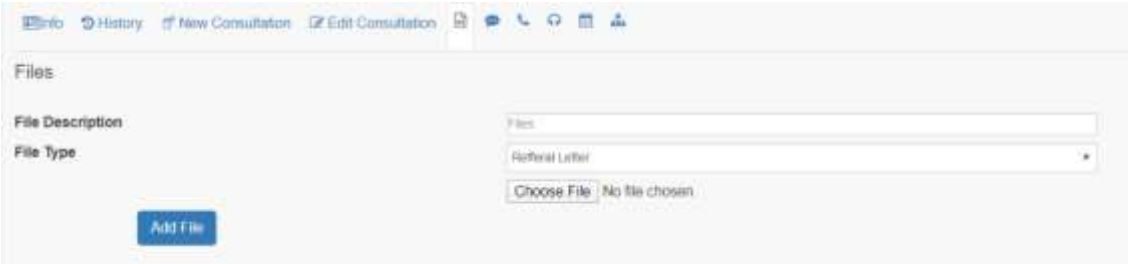
8.4.2 Click on the edit button: 

The consultation screen will reopen and all steps in *New Consultation* is applicable here. Information saved previously will be retained.

8.5 Patient files

This icon shows a list of the files uploaded for this patients and also allows you to upload files applicable to the patient. 

a. Select the icon, the following screen will appear:



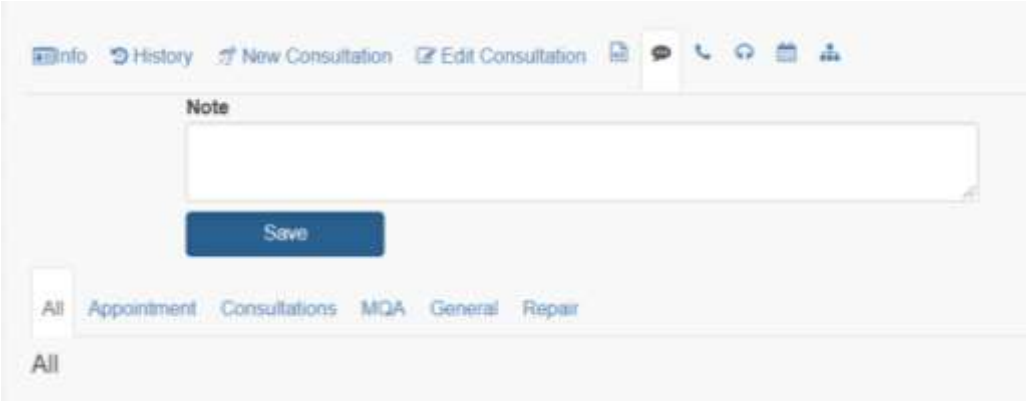
b. Insert a file description.
c. Choose the file type.
d. Select Add file.
e. Files can be deleted or downloaded from this screen:

Delete file

Download file

8.6 General notes

This icon allows you to view a history of appointment, consultation, MQA, general and repair notes for the specific patient in question and allows you to add general notes regarding this patient.



8.7 Communication

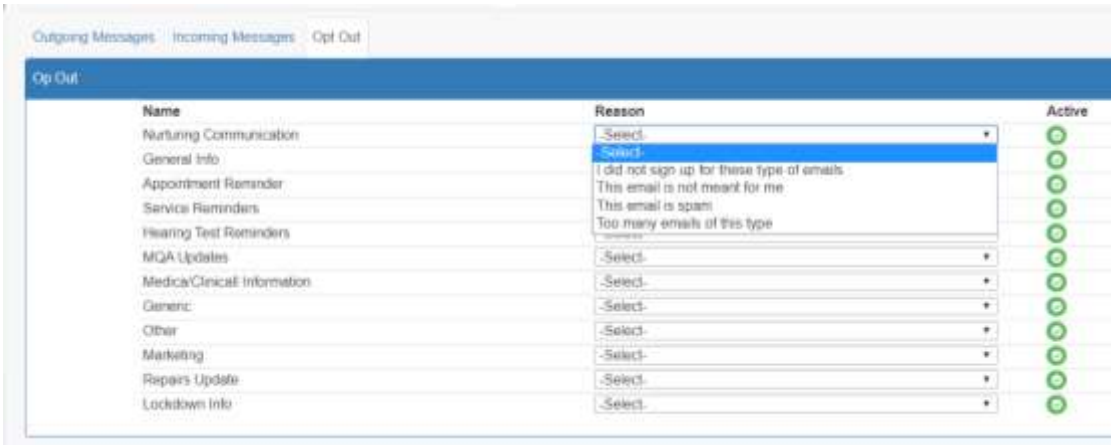
Use this icon to see a history of communication to and from a patient as well as certain scheduled communication that will be sent out.

NOTE: Specific communication is generated the day that it will send out and will not be viewable under the scheduled communication immediately. This communication includes Birthday Communication or annual hearing test and service reminders.

8.7.1 ***Outgoing messages*** lists all messages already sent out and scheduled to be sent out by from the system.

8.7.2 ***Incoming messages*** shows the patient's replies on SMS's sent to him/her

When the patient wants to opt out from certain types of messages, it can be edited under the *Opt Out* function. Select this option and select the certain messages the patient wants to stop receiving. The patient can also reply *Stop* when he receives a certain message to opt out from receiving them. Emails contain an unsubscribe link the patient can click on and unsubscribe themselves.



8.8 Managing accessories on the patient's profile

Click on this icon to manage devices and accessories.

Accessories are typically defined as any device / system used in conjunction with their hearing instruments – For instance chargers, phone streaming devices, TV streaming devices, FM systems, electronic drying systems etc.

8.8.1 Add Accessories

a. Select the brand from the dropdown list
b. Select the type of accessory from the dropdown list
c. Select the applicable accessory
d. Insert the price value (replacement value) of the accessory
e. Click on the blue plus at the end of the column to add it to the patient's profile. The following screen will appear:

f. Enter the serial number of the accessory
g. The replacement value or price entered at 27.1.4 will default in the field
h. Enter the warranty expiry date
i. *Save* the changes made

After saving the accessories screen will remain open if you would like to add more accessories. If not, close the screen by clicking on the X – top right hand corner.

8.9 Booking a repair / Initiating the repair sequence

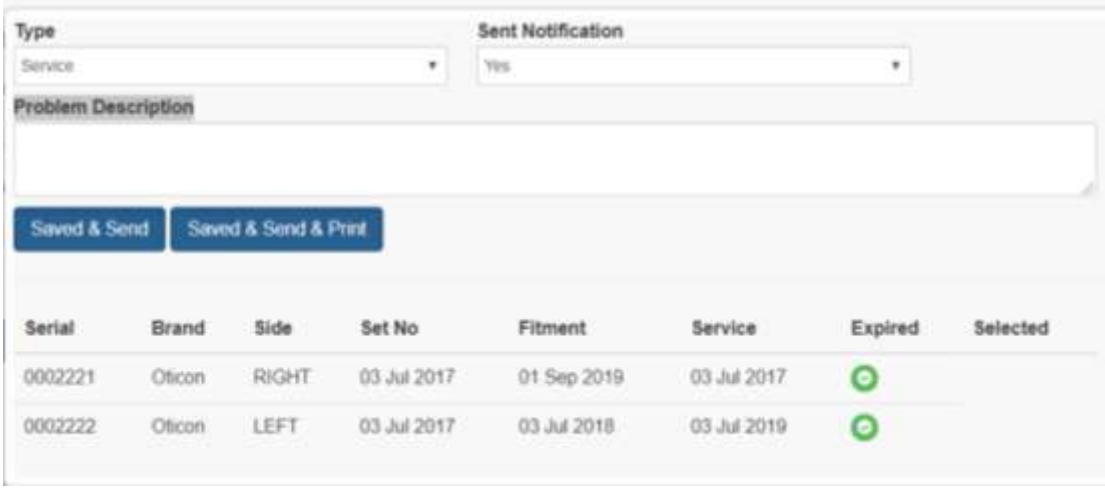
Please note that hearing aid information needs to be captured before the hearing aid can be booked for a repair.

When a repair or service needs to be booked, select this icon:

8.9.1 Select the applicable hearing aid (Select the blue cross under the selected column – when selected the blue cross will change to a green tick)

8.9.2 Once selected – click on Book In.

8.9.3 The following screen will open up:



8.9.4 Choose the ***type*** of procedure performed on the hearing aid: *Service / Repair*

8.9.5 "Sent notification" activates/deactivates communication sent to the patient when the hearing aid is sent in for the repair/service – choose YES if you want to notify them, NO if you do not want to notify them

8.9.6 *Problem description:* Describe the problem found with the instrument or request for service for hearing aid

8.9.7 *Next step: Choose one of the following:*

a. ***Saved & Send*** saves the repair request and initialises the repair sequence

b. ***Saved & Send & Print*** saves the repair, initialises the repair sequence and prints the request on a document that accompanies the instrument to the manufacturer lab and prints a document where a patient can sign to give permission to send the device for repairs.

Refer to the Repair Sequence for information about all the steps continuing the process of a repair.

8.10 Reminders

Click on this icon to view any reminders set regarding this specific patient. Reminders will display according to date – with oldest items first.

In this screen the following can be done with each reminder:

 View patient information tab

 Edit reminder fields

 Mark reminder as complete

 Delete reminder

8.11 Patients referred by this patient

If the patient has referred another patient and it is indicated so on the referred patient's profile, you will see a list of patients that this patient referred.

9. Prospective portal

9.1 Purpose of the prospective portal

The prospective portal is a separate database for individuals that has not yet been seen / consulted in the practice. The reason for the separation of the patient portal and the prospective patient portal is that you might want to communicate a different message to those that are prospective patients. In essence your prospective portal becomes your 'leads' that you want to bring in to be seen. Suggestions of what to add in here:

- Automatically added are those new patients who book appointments – if they do not attend their appointment, you still have their details on the prospective portal
- If you run a Facebook campaign or a lead generation campaign, patient details needs to be entered into prospective that you can continue to communicate with them in future.

The patients that have been added on the system but has no consultations logged can be found under prospective portal.

9.2 Edit a patient's details on prospective portal

9.2.1 To edit the classification or change a patient's details, search for the patient in the *filter* tab

9.2.2 Select the patient's name

9.2.3 Change the details as needed

The steps to editing a patient under prospective portal is the same steps to edit a patient's details under the patient's profile and can be found under step 3.

10. Calendar

When you click on "Calendar" and it won't open, enable your pop-ups as explained in point 7.5.3b – d.

10.1 Scheduling an appointment from *Calendar*

a. Select the view that you prefer to work in: Active / Day / Week / Month

b. Select the day and time to make the appointment on

c. An appointment screen will open up:

10.1.1 Scheduling an appointment for a patient that has been to the practice before

If the appointment is for a patient that has been to the practice before:

Search for the patient in the search field (Name / Surname / cell nr / ID nr). Patient information automatically pulls through from the patient profile. The second column needs to be edited according to the appointment needs:

a. **Date:** Choose a date and time for the patient appointment. You are able to access 15 minute intervals by clicking on the hour.
b. **Procedure:** Choose the procedure that will be performed during the appointment , e.g. a hearing test (These procedures are set up in the settings screen).
c. **Duration:** Complete the desired duration of the procedure. This can be set to a certain default under settings.
d. **Examiner**: Input the examiner who will perform the procedure of this patient (These examiners are set up in the settings screen by Heardat Support).
e. **Assistant:** In the event an assistant is needed, input the person who will assist the examiner during the procedure. The assistant is one of the users on the system and also set up in the settings screen by Heardat Support.
f. **Branch:** Input the applicable branch where this procedure will be performed.
These applicable medical details are filled in by default.
g. **Ref by Dr:** If the patient has been referred by a doctor, you can select the doctor in this field.
h. **Send comms:** If you want patients to receive a reminder regarding the appointment, you can leave it on *Yes*. Selecting *No* will deactivate the appointment reminders for the appointment just made.
i. **Appointment note:** In the event it is needed to make an extra note for the appointment, it can be made in the box. This note will be visible under the patient profile.
j. **Save:** Select this tab to save the appointment made.

10.1.2 Scheduling an appointment for a new patient (not on the system yet)

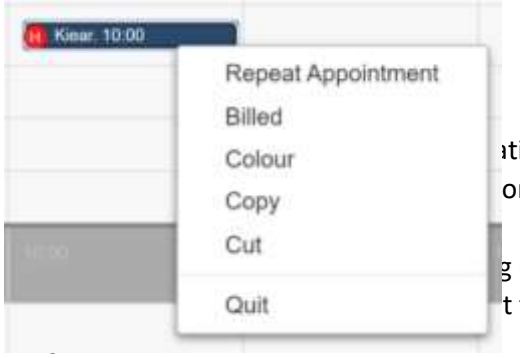
The following needs to be completed to save the new appointment.

ID Number: To save time, enter the patient's cellphone number in this field , e.g. *0821234567*. It can be changed when the patient comes in for his/her appointment or when the patient fills in the online admission form.

a. **First name**: The patient's first name
b. **Last name**: The patient's surname
c. **Preferred name**: The name that the patient prefers to be called. If he doesn't specify – leave this the same as the last name. Make sure when he arrives that you change this if he prefers another name to be used.
d. **Cellphone number**: the cell phone number of a patient to be able to call back in case an appointment has to be moved or cancelled and so the patient can receive appointment reminders. Make sure that this number does not have any spaces (eg. 082 123 4567). This is also the number the system will send appointment reminders to.
e. **Email**: As with *ID Number*, it might be too time-consuming to ask the patient for this information, thus just leave the field blank for the time being. It can be changed when the patient comes in for his/her appointment or fills in the online admission form.
f. **Gender**: Select male or female
g. **Language**: The patient will get a message reminding him/her of his/her appointment, and will be more comfortable getting it in their language of choice. Choose the applicable language the patient prefers.
h. **Title**: Add the patient title – this is necessary for some communication to be sent out in the correct format.

i. **Date:** Choose a date for the patient appointment
j. **Procedure:** Choose the procedure the patient requested, e.g. a hearing test (These procedures are set up in the settings screen).
k. **Duration:** Complete the desired duration of the procedure
l. **Examiner:** Input the examiner who will perform the procedure of this patient (These examiners are set up in the settings screen by Heardat Support).
m. **Assistant:** In the event an assistant is needed, input the person who will assist the examiner during the procedure. The assistant is one of the users on the system and also set up in the settings screen by Heardat Support.
n. **Branch:** Input the applicable branch where this procedure will be performed.
o. This patient's applicable medical details will be filled in when the patient updates it on the online admission form. You can leave it blank.
p. **Appointment note:** In the event it is needed to make an extra note for the appointment, it can be made in the box. These notes will be accessible on the patient profile under notes
q. **Save:** Select this tab to save the appointment made.

The appointment window will close automatically, the program will refresh and the appointment will display in the correct position on the calendar. When the appointment has been made – you can right click on the appointment and the following will appear:



- atient has a recurring appointment with you, you can onthly and annually and you can choose how many
- g billed – the colour of the appointment will change. t the specific appointment has been billed / invoice
- **Colour:** Choose a colour you want to highlight your appointment with
- **Copy:** When copying an appointment, you will be able to paste it anywhere, instead of booking a whole new appointment for the same patient.
- **Cut:** When you want to move an appointment, you can just "cut" it and paste it where you want to move it.
- **Quit:** Click on Quit to close this pop-up screen

11. Messages

Messages is an instant portal for SMS / Email communication. This is not for bulk messaging. If you have to send a specific message but not necessarily linked to a specific patient, messages can be used. If you want to send a single message to a patient, it is advised to search for their name from the patient portal, open their patient dashboard and click on SEND COMMS as explained in point 17.

a. Select *messages*
b. Choose the template you want to send or type the message you want to send under *message*
c. Fill in the applicable details (Cell no., email address, etc.)
d. Select the applicable bar / type you want to send the message as (Email / SMS)

11.1 Setting up communication templates (SMS / Email)

a. To edit the templates, go to *Settings*
b. Select the *templates* tab
c. Select the applicable templates that needs to be changed:

11.1.1 SMS Templates

a. Create a new SMS Template:

k. Insert a suitable name for the template – choose something that is descriptive.

ii. Insert the English message for this template (remember to use suitable key words which can be found under *Show Key Words*)

iii. Insert the Afrikaans message for this template (remember to use suitable key words which can be found under *Show Key Words*).

iv. If you want the message to go out in one language only, you need to copy the same message in both the Afrikaans and English field.

Save the changes made

b. Edit a current SMS template:

i. To edit an SMS template, find the template that needs to be changed and select this button:

ii. Do the necessary changes and *Save* the edited content.

11.1.2 Email Templates

a. Add new Email template:

i. Insert a suitable name for the template

ii. Insert a subject under the *Opskrif – *Afrikaans* & *Subject - *English* fields.

iii. Type the English and Afrikaans messages for the template. (Remember to use key words that can be found under *Show Key Words*).

iv. *Save* the template

b. Edit a current Email template

i. To edit an email template, find the template that needs to be changed and select the *edit* icon

ii. Add the necessary changes and *Save* the edited message.

NOTE: Email templates created within Heardat in will display very simply without images and professionally designed layout. In the case that you want to create a template with images it is necessary to do so in a third party software system such as 'Mailchimp', export the HTML code and paste this into the template area in 36.5 / 36.6.

11.1.3 WhatApp Templates

- Insert a suitable name for the template
- Insert the Afrikaans and English messages for the template. (Remember to use key words which can be found under *Show Key Words*).
- *Save* the template
- To edit a WhatsApp template, find the template that needs to be changed and select this icon
- Add the necessary changes and *Save* the edited message.

*Please note that the WhatsApp feature is still in the process of being refined

12. Repairs sequence

Keeping the patient up to date regarding repairs / Repair sequence

Repair sequence buttons explained:

From left to right the buttons mean the following:

a. Booked in
b. Sent with courier
c. Feedback from lab / quotation / report
d. Patient Approval
e. Returned
f. Collected

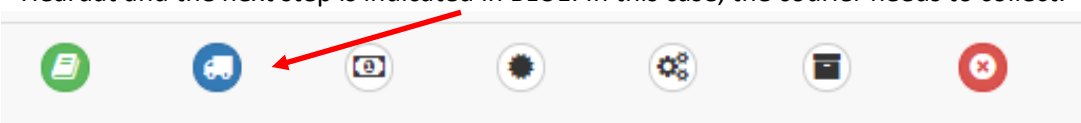
Step 1: Booking in a repair

Booking in of a repair was discussed in 8.9

Step 2: Collection of repair by courier

Select the *Repairs* tab on the left of the screen. You will see all instruments that is currently out for repairs or that needs to be sent but has been received by the practice from the patient. From the buttons and their colours you will know how far in the process each of the repairs are:

12.2.1 The following sequence means that that the devices have been 'booked in' on Heardat and the next step is indicated in BLUE: In this case, the courier needs to collect.



12.2.2 Select this button when the courier collects the instruments.
The following screen will open:

a. Enter the waybill number for your thorough recordkeeping
b. Select whether the patient will receive a notification of collection by couriers or not by selecting YES / NO

Step 3: Feedback from lab / quotation / report

If a patient's hearing aids are still under warranty, you can skip this step and move on to the "instrument returned" step.

When the supplier or lab has given initial feedback regarding the cost (quotation) or the extent of damage, click on this button and the following screen will open up:

Insert the quotation number for your thorough recordkeeping; insert the quotation amount for the patient. Insert notes for the practice in the ***Note*** field, you can choose YES or NO to choose to send a notification to the patient with the quotation amount in. You can also upload the original quotation from the company in the ***Add File*** tab.

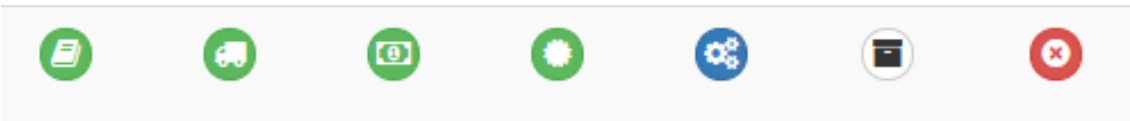
Step 4: Patient feedback / Approval

When receiving a reply from a patient whether to continue with the repair or not, the next button is ticked:

This action will open up the following screen and require you to show whether the patient accepted the quotation or not. You once again have the option of sending the patient a notification of this step / progress.

Step 5: Instrument returned

When the instruments are received back from repairs, click on the next button:



The following screen opens up:

Complete delivery details such as waybill number. Remember to insert a new service date – when the instruments are next due for a service. Choose to let the patient know that the instruments are back by choosing YES or NO if you prefer to phone them.

Step 6: Instrument collected

It is now time for the patient to collect his/her instrument and when this happens, click on the last button.

The following screen will appear:

Make a note regarding collection, choose whether you should still bill/invoice the patient. Choose whether you want to send a message with collection – YES / NO. When you save this step, the screen will close automatically and the patient name & devices will disappear from the repairs list.

In the event you would like to delete a booking for a service, just select the following: 

12.2. Changing the repairs bookmark communication

The option to edit the repairs bookmarks can be found under *Templates* in *Settings*.

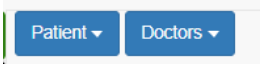
a. Select the branch where the bookmarks must be different
b. Select the communication that has to be sent out with each bookmark /step under Email.
c. Select the communication that has to be sent out with each bookmark / step under SMS.
d. Select an opt-out category for the messages to fall under for when patient request to stop receiving this type of information.
e. Choose a template for the Print Repair Log (the letter that accompanies instruments sent in for repairs)
f. *Save* the changes made.

13. Sending Bulk SMS and Email

Heardat has the ability to filter out certain patients depending on your needs – filtering groups of patients enables you to communicate a certain message to a certain group of people. Before starting to filter your patients/ doctors, ensure that you have saved the SMS / Email in the templates and that you know what the title of the template is under which you saved it. Also know to which groups you want to communicatecertain messages.

Now you are ready to start filtering your data.

13.1 Select the relevant tab

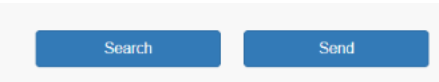


- When marketing to patients, select the *Patients* tab
- When marketing to doctors, select the *Doctors* tab

13.2 There will be options to choose to filter the patients to who you want to send the messages. If you do not want to include the filter in the variables leave the field open and Heardat will not take that field into account. The following are optional aspects that can be selected in the filtering section:

- Branch
- Patients referred by a certain doctor
- Classification
- Hearing aid level
- Hearing aid model
- Hearing aid Brand
- Medical Aid
- Medical Aid Plan
- Patients with any previous fittings
- Gender
- Religion
- Potential Hearing Aid Candidate
- The last year that a patient had a fitting
- Patients who has a specific procedure in their history
- Medical aid main members or dependants
- Patients who accepted or declined the Terms and Conditions
- The patient's age

13.3 *Search* after the details to filter the patients by have been filled in to receive a list of relevant patients.



13.4 Click on *Create Message.*

13.5 Insert a custom message or choose a template

NOTE: It is advisable to have a template to choose from to send to patients. To edit a template, refer to step 35 and 36.

13.6 *Send* to send out the message

13.7 When marketing to doctors, select the *Doctors or other professionals the following can be filtered:*

- Title
- Profession
- Practice name

13.8 Select *Search* to search the list of doctors marketing to

13.9 Click on *Create Message*

13.10 Insert a custom message or choose a template

It is advisable to have a template to choose from to send to the doctors

13.11 *Send* to send out the message

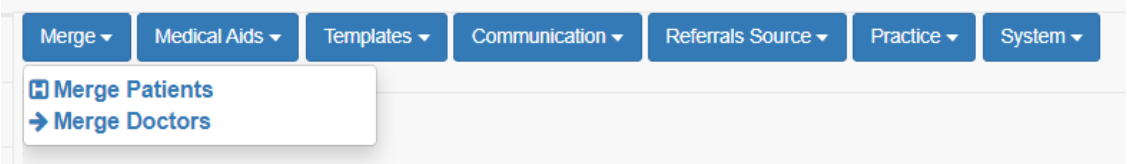
14. Settings

NOTE: Depending on your user clearance level, you might not be able to access certain functions / features in the settings tabs.

14.1 Merge

The purpose of the merge function is that in the case of a possible duplicate patient that was created or a duplicate professional referral source, one can merge the 2 duplicates, since you do not want to delete the one entry as any history, information and communication will also be deleted.

14.1.1 How to merge a patient



a. Select the Merge Patients option. The following will display:

b. Search for one of the patient profiles that you want to be able to merge, the list will display and you are able to select the new primary patients and the secondary patient.

NOTE: The New Primary Patient will be the remaining patient on the system. The Secondary Patient will not display on the system anymore at all, except for the data – which will be visible in the New Primary Patient's profile.

c. When you have selected the New Primary Patient – this patient details will be on the right hand side. The Secondary Patient will display on the left.

d. Select the Merge (==>) button.

e. The ID fields on both the left and right side will clear and the following message will briefly appear.

NOTE: Patient information of the primary patient will remain the same, all consultations of the secondary patient will be merged with the primary patient. The one exception is hearing aid information – the patient whose hearing aid information is the most recent will be used.

14.1.2 How to Merge a doctor / referring professional

a. Select the Merge Doctors option. The following screen displays:

b. Select the *Referring Doctor* entry that you want to merge with another on the left.
c. Select the *To Referring Doctor* entry that you want the left entry to be merged with on the right.
d. Select the merge (==>) tab
e. The following will appear and disappear after merging the professionals:

14.1.2 Member / Dependants Maintenance

a) To link a Main Member to a dependant of the same Medical number, select the *Member / Dependants Maintenance* option.
b) Search the patient to be the main member
c) Click on the "Make main member start"
d) Search the patient you want to link to this patient
e) Click "Add to List" to add this patient as a dependant
f) Repeat steps d – e for any patients you want to add to this main member

14.3 Templates

14.3.1 Documents template

NOTE: For optimal display, it is best to use a HTML format of info that is copied into the template fields. Keywords are used in the templates to ensure patient specific information and correctness of information displayed on these documents. (For information on HTML coding, please consult Heardat Support. Support numbers are displayed in the top left hand corner of the screen when logged into Heardat).

The following templates are stored and edited under the documents template:

- Insurance certificate template
- Patient information print sheet
- Repair Print sheet & Patient Permission to send repair

How to add a new template:

i. Insert the name of the template
ii. Select the branch from where the template is being used
iii. Type /paste in the English template (HTML if possible)
iv. Type /paste in the Afrikaans template (HTML if possible)
v. *Save* the template

The screen will display as below:

Document template tabs explained:

- **English Preview:** Preview what the document would look like after entering content.
- **Afrikaans Preview:** Preview what the document would look like after entering content.
- **Save:** Save the template
- **Key Word:** List of key words applicable and to be used to templates for appointments and certificates which can also be found on the system.

@PATTITLE = Patient Title @PATNICNAME = Patient Nick Name @FIRSTNAME = Patient First Name @LASTNAME = Patient Last Name @PATID = Patient ID @PATCELL = Patient Cell @PATWORK = Patient Work @PATEMAIL = Patient Email @MEDICALAIDNAME = Patient Medical @MEDICALAIDPLAN = Patient Plan @PAT_LANG = Patient Language @PAT_ADR1 = Patient Adr Ln1 @PAT_ADR2 = Patient Adr Ln2 @PAT_ADR3 = Patient Adr Ln3 @PAT_CODE = Patient Adr Cd @PAT_POS1 = Patient Pos Ln1 @PAT_POS2 = Patient Pos Ln2 @PAT_POS3 = Patient Pos Ln3 @PAT_POSCODE = Patient Pos Cd @OCCUPATION = Patient Occupation @GENDER = Patient Gender @DEPENDENTCODE = Dependent Code @PATBIRTHDATE = Patient Birthday @MAINMEMNAME = Member Name @MAINMEMSURNAME = Member Surname @MAINMEMID = Member Id @MAINMEMCELL = Member Cell @MAINMEMMAIL = Member Email @PATIENTRELATION = Patient Relation @MEDIANAME = Patient Media @DOCPRACTICE = Ref Doc Practice @DOCNAME = Ref Doc Name @DOCSURNAME = Ref Doc Surname @DOCTITLE = Ref Doc Title @DOCTYPE = Ref Doc Type @PAT_REF_NAME = Patient Ref Name @PAT_REF_SURENAME = Patient Ref Surname	@COMPANYNAME = Companyname @COMPANYDISPLAYNAME = Company Display Name @COMPANYDISPLAYNAAM = Companyname Display Name Afr @COMVATNO = Vat No @COMPRACTICENO = Practice No @COMREGNO = Registration No @HPSCA = HPSCA @HEADING = Company Display Name @COMPANYPHONE = Company Phone @COMPANYLOGO = Company Logo @BRANCHNAME = Branch Name @BRANCHEMAIL = Branch Email @BRANCHPHONE = Branch Tel @BRANCHADR1 = Branch Address Line 1 @BRANCHADR2 = Branch Address Line 2 @BRANCHADR3 = Branch Address Line 3 @BRANCHCODE = Branch Address Code @PATMEDICALAIDNO @TOTALAMOUNT @TOTALLEFTAMOUNT or @TOTALRIGHTAMOUNT @HearingStyleLeft or @HearingStyleRight @SerialNumberLeft or @SerialNumberRight @BATTERYLEFT or @BATTERYRIGHT @TUBESLEFT or @TUBESRIGHT @DOMESLEFT or @DOMESRIGHT @Recieversleft or @RecieversRIGHT @Brandleft or @BrandRight @Waxguardleft or @WaxguardRight @HearingAidleft or @HearingAidRight @HearingAidleftService or @HearingAidRIGHTService @HearingAidleftWarrant or @HearingAidRIGHTWarrant @AccessoriesTable @RepairsTable Use @LeftDetails for left details and @RightDetails for right put the key words in site the element begin and close brackets.

- **Repairs Key Word:** List of key words applicable and to be used to the repair templates which can also be found on the system

@PATTITLE = Patient Title @PATNICNAME = Patient Nick Name @FIRSTNAME = Patient First Name @LASTNAME = Patient Last Name @PATID = Patient ID @PATCELL = Patient Cell @PATWORK = Patient Work	@FITMENTDATE = Fitment Date @SERIALNO = Serial @SERVICEDATE = Service Date @SENSETYPE = Hearingaid Sense Type @COLOUR = Colour @MAINMEMID = Member Id @MAINMEMCELL = Member Cell

@PATEMAIL = Patient Email @MEDICALAIDNAME = Patient Medical @MEDICALAIDPLAN = Patient Plan @PAT_LANG = Patient Language @PAT_ADR1 = Patient Adr Ln1 @PAT_ADR2 = Patient Adr Ln2 @PAT_ADR3 = Patient Adr Ln3 @PAT_CODE = Patient Adr Cd @PAT_POS1 = Patient Pos Ln1 @PAT_POS2 = Patient Pos Ln2 @PAT_POS3 = Patient Pos Ln3 @PAT_POSCODE = Patient Pos Cd @OCCUPATION = Patient Occupation @GENDER = Patient Gender @DEPENDENTCODE = Dependent Code @PATBIRTHDATE = Patient Birthday @MAINMEMNAME = Member Name @MAINMEMSURNAME = Member Surname @MOULDTYPE = Mould Type @LENGTH = Length @POWER = Power @BRANCHCODE = Branch Address Code @RATINGURL = Branch Rating Url @PATMEDICALAIDNO @PROBLEMDESCR = Repair Description @DATECREATED = Repair Date @SIDE = Side @HALEVEL = Level @STYLE = Style	@MAINMEMMAIL = Member Email @PATIENTRELATION = Patient Relation @MEDIANAME = Patient Media @DOCPRACTICE = Ref Doc Practice @DOCNAME = Ref Doc Name @DOCSURNAME = Ref Doc Surname @DOCTITLE = Ref Doc Title @DOCTYPE = Ref Doc Type @PAT_REF_NAME = Patient Ref Name @PAT_REF_SURENAME = Patient Ref Surname @COMPANYNAME = Companyname @HEADING = Company Display Name @COMPANYPHONE = Company Phone @COMPANYLOGO = Company Logo @BRANCHNAME = Branch Name @BRANCHEMAIL = Branch Email @BRANCHPHONE = Branch Tel @BRANCHADR1 = Branch Address Line 1 @BRANCHADR2 = Branch Address Line 2 @BRANCHADR3 = Branch Address Line 3 @DOME = Dome @TUBE = Tube @MOULDMATERIAL = Mould Matrial @MOULDSIZE = Mould Size @VENTSIZE = Vent Size @FITMENTPROVIDER = Fitment Provider

How to edit a document template:

a. Scroll down to see the list of document templates saved.
b. Find the template you want to edit.
c. Choose the button at the end of the line: 
d. Scroll up to the content fields and edit / replace the content.
e. Preview the English & Afrikaans template and ***save***.

14.3.2 Legal documents template

NOTE: For optimal display, it is best to use a HTML format of info that is copied into the template fields. Keywords are used in the templates to ensure patient specific information and correctness of information displayed on these documents. (For information on HTML coding, please consult Heardat Support. Support numbers are displayed in the top left hand corner of the screen when logged into Heardat).

The following templates are stored and edited under the legal documents template:

- Practice Terms & Conditions

How to add a new legal template:

a. Insert the name of the template
b. Select the branch from where the template is being used
c. Type in the English template
d. Type in the Afrikaans template
e. *Save* the template

The screen will display as follows:

Document template tabs explained:

- **English Preview:** Preview what the document would look like after entering content.
- **Afrikaans Preview:** Preview what the document would look like after entering content.
- **Save:** Save the template
- **Key Word:** List of key words applicable and to be used to templates for legal documents:
-

@PATTITLE = Patient Title @PATNICNAME = Patient Nick Name @FIRSTNAME = Patient First Name @LASTNAME = Patient Last Name @PATID = Patient ID @PATCELL = Patient Cell @PATWORK = Patient Work @PATEMAIL = Patient Email @MEDICALAIDNAME = Patient Medical @MEDICALAIDPLAN = Patient Plan @PAT_LANG = Patient Language @PAT_ADR1 = Patient Adr Ln1 @PAT_ADR2 = Patient Adr Ln2 @PAT_ADR3 = Patient Adr Ln3 @PAT_CODE = Patient Adr Cd @PAT_POS1 = Patient Pos Ln1 @PAT_POS2 = Patient Pos Ln2 @PAT_POS3 = Patient Pos Ln3 @PAT_POSCODE = Patient Pos Cd @OCCUPATION = Patient Occupation @GENDER = Patient Gender @DEPENDENTCODE = Dependent Code @PATBIRTHDATE = Patient Birthday @MAINMEMNAME = Member Name @MAINMEMSURNAME = Member Surname @MAINMEMID = Member Id @MAINMEMCELL = Member Cell @MAINMEMMAIL = Member Email @PATIENTRELATION = Patient Relation @MEDIANAME = Patient Media @DOCPRACTICE = Ref Doc Practice @DOCNAME = Ref Doc Name @DOCSURNAME = Ref Doc Surname @DOCTITLE = Ref Doc Title @DOCTYPE = Ref Doc Type @PAT_REF_NAME = Patient Ref Name @PAT_REF_SURENAME = Patient Ref Surname @COMPANYNAME = Companyname @COMPANYDISPLAYNAME = Company Display Name	@COMPANYDISPLAYNAAM = Companyname Display Name Afr @COMVATNO = Vat No @COMPRACTICENO = Practice No @COMREGNO = Registration No @HPSCA = HPSCA @HEADING = Company Display Name @COMPANYPHONE = Company Phone @COMPANYLOGO = Company Logo @BRANCHNAME = Branch Name @BRANCHEMAIL = Branch Email @BRANCHPHONE = Branch Tel @BRANCHADR1 = Branch Address Line 1 @BRANCHADR2 = Branch Address Line 2 @BRANCHADR3 = Branch Address Line 3 @BRANCHCODE = Branch Address Code @PATMEDICALAIDNO @TOTALAMOUNT @TOTALLEFTAMOUNT or @TOTALRIGHTAMOUNT @HearingStyleLeft or @HearingStyleRight @SerialNumberLeft or @SerialNumberRight @BATTERYLEFT or @BATTERYRIGHT @TUBESLEFT or @TUBESRIGHT @DOMESLEFT or @DOMESRIGHT @RecieversleftorRecieversRIGHT @Brandleft or @BrandRight @Waxguardleft or @WaxguardRight @HearingAidleft or @HearingAidRight @HearingAidleftService or @HearingAidRIGHTService @HearingAidleftWarrant or @HearingAidRIGHTWarrant @AccessoriesTable @RepairsTable Use @LeftDetails for left details and @RightDetails for right put the key words in site the element begin and close brackets.

How to edit a legal document template:

a. Scroll down to see the list of legal document templates saved.
b. Find the template you want to edit.
c. Choose the button at the end of the line: 
d. Scroll up to the content fields and edit / replace the content.
e. Preview the English & Afrikaans template and ***save***.

14.3.3 Bookmark templates

Function of the bookmarks on the system: A bookmark is a designated field where you can assign a certain template of communication (SMS / Email) that is automatically sent out after a certain action / procedure. ***NOTE:*** templates need to be added/ loaded in SMS and EMAIL TEMPLATES under the **SETTINGS > TEMPLATES** tab.

The following bookmarks are available:

a. **New patient:** Welcome communication to be sent to patient after logging his/ her first procedure. This message will only go out ONCE in a patient's journey.
b. **Prospective welcome:** IGNORE
c. **New referral email to doctor:** Thank you communication sent out to the referring professional added into the referring professional field in patient information.
d. **New referral email to client:** Thank you communication sent to the referring patient already on your system (Referred by name field in patient information; '*word of mouth referrals'*).
e. **Birthday:** Birthday communication to patients
f. **Appointment created:** Communication sent to patient after an appointment has been saved on the Heardat Calendar.
g. **Appointment patient update confirmed:** IGNORE
h. **Appointment confirmed:** Insert the "Appointment created" SMS in this field. This SMS will send out when an appointment is rescheduled.
i. **Appointment change send to audiologist:** IGNORE
j. **Appointment 24H before**: Communication sent out to patient 24h before the appointment on the Heardat Calendar.
k. **Appointment morning:** Communication sent to patient the morning of his appointment to remind him / her of the appointment on the day.
l. **Appointment 1H before:** Communication sent to patient 1 hour before the appointment time.
m. **Service reminders:** Communication to remind the patient of a service due on hearing instruments. To be sent out according to the service date loaded on the hearing aid.
n. **Warranty expiry reminder:** Communication to remind the patient of hearing instrument warranty almost expiring. To be sent out according to the warranty expiry date loaded on the hearing aid.
o. **Personal reminder:** Communication template that will be used to send out personal reminders of Heardat users as they have set up reminders for themselves and other Heardat users.
p. **Annual hearing test reminder:** Communication to remind a patient that he/ she is almost due for an annual hearing test.
q. **Recurring hearing test email / SMS:** Recurring hearing test reminders that are sent out after the annual hearing test reminder and can be set to send out after a time period of your preference. Contact Heardat Support for assistance.
r. **Recurring service reminder:** As with the recurring hearing test reminder it can be sent out after the service reminder after a time period of your preference. This is not necessary. However, should you want to send out the reminders, you can contact Heardat Support for assistance.
s. **Generic WhatsApp:** IGNORE as this function is still in the process of being refined.

14.3.4 Documents bookmarks

The purpose of document bookmarks is to assign a specific template to the INSURANCE CERTIFICATE and the PATIENT INFORMATION print document.

a. Select the branch where this template will be applicable

b. Choose the insurance certificate template of the practice
c. Choose the insurance certificate accessories
d. Choose the patient information template
e. *Save* the changes made

14.3.5 Return bookmarks

The purpose of return bookmarks is to assign a specific template to the communication that will be sent out to the patient when he returns a hearing instrument after a trial. More.

How to select a return bookmark:

a. Select the branch where the bookmarks are applicable
b. Select the relevant return option
c. Select the email template to send out when a patient has returned his/her hearing aids
d. Select the SMS template to send out when a patient has returned his/her hearing aids
e. *Save* the changes made

14.3.6 Legal document bookmark

The purpose of legal document bookmarks is to assign a specific template to the legal document applicable wherever you will use it.

How to select / assign a legal document bookmark

a. Select the branch where the legal document is applicable
b. Select the legal document template to upload
c. *Save* the changes made

14.4 Communication

Campaign

The purpose of 'Campaigns' is to specify from which campaign a patient came into the practice. This is 'secondary' to the primary source of referral, and can change every time you see a patient. This is mainly for practice reporting purposes; no communication is linked to this fields.

How to add a new campaign:

a. **Name:** Insert the name of the campaign
b. **Promo code**: A code that enables a patient to get a benefit from the practice e.g. *20% off rechargeable hearing aid batteries (optional)*
c. **Description:** The description of the marketing campaign e.g. *The Senior September month (marketed at Mall of Africa) has a 15% pensioner's discount on rechargeable hearing aid batteries.*
d. **Campaign type**: Insert the type of campaign and how it was marketed e.g. billboards /

Facebook

e. **Branch:** Select the branch involved in the campaign
f. Insert the start and end dates of the campaign while it was running
g. ***Save*** the changes made

*****The saved options will be available at the [NEW CONSULTATION](#) tab on the patient portal:***

14.5 Referrals source

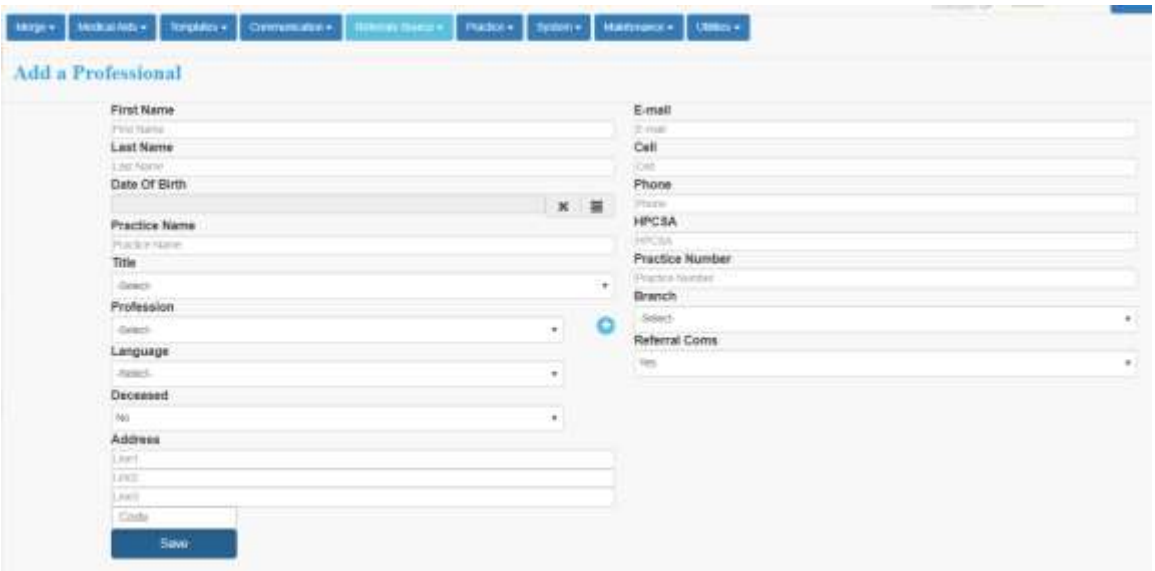
The purpose of this is to keep a list of referral sources and includes:

- Professional Referrals (Doctors, Allied Professionals etc)
- Media (Any possible media sources where patients heard of you)
- Patients that refer friends & others (Existing patients that referred friends/ colleagues etc.)

To add a new referrals source, use the *Referrals Source* tab and add under one of the following headings:

14.5.1 Professionals (Dr's, allied professionals etc)

a. **First Name:** Insert the first name of the professional referral
b. **Last name:** Insert the last name of the professional referral
c. **Date of Birth:** Insert the date of birth of the referral
d. **Practice name:** Insert the practice name where the referral is working
e. **Title:** Select the title of the referral
f. **Profession:** insert the profession of the referral
g. **Language:** Insert the language of the referral
h. **E-mail:** insert the email address of the referral
i. **Cell:** insert the cell phone number of the referral
j. **Phone:** Insert the telephone number of the practice the referral is occupational
k. **Practice number:** Insert the practice number of the referral
l. **Branch:** Select the branch where the referral usually refers a patient
m. **Referral Coms.**: Select whether or not the referral wants to receive communication when a patient has been referred by him/her
n. Insert the residential address of the referral
o. ***Save*** the details of the referral.



Edit a current Professional details

a. Scroll down to the list of current professionals
b. Select the professional that you want to edit
c. Click on the last button: 
d. Edit the professional's details
e. Click save

14.5.2 Media

Add a new media platform

a. Add a media platform
b. Insert a media type, e.g. Facebook
c. *Save* the media type

Edit a current media platform

a. Scroll down to the list of current media referrals
b. Select the media referral that you want to edit
c. Click on the last button: 
d. Edit the Media referral
e. Click save

14.5.3 Referred by name

The purpose of this is to keep track of the patients referred by a specific patient. Should the patient / person not be on your system and it cannot be classified under professional / media – you can add the person here.

To add a new person enter the following fields:

a. **First name:** Insert the first name of the referral
b. **Last name:** insert the surname of the referral
c. **Initials:** Insert the initials of the referral (The first letter of every name excluding the surname)
d. **Cell number:** Insert the cell phone number of the referral
e. **Email:** Insert the email address of the referral
f. **Work:** Insert the work telephone number of the referral if applicable
g. **Company:** Insert the company where the referral is occupational
h. **Occupation:** Insert the occupational title of the referral
i. **Branch:** Select the branch the referral usually refers a patient
j. **Gender:** Select the gender of the referral
k. **Title:** Select the title the referral prefers to be called upon
l. **Language:** Select the language the referral is more comfortable with.
m. ***Save*** the details of the referral

The referral source above can also added while adding new patient information:

14.6 Practice

14.6.1 Edit the company details

This tab enables you to change company details should they change at any time.

How to edit company details:

Select *Company Details* tab & change the necessary fields

a. **Practice name:** Insert the name of the company.
b. **Display name:** Insert the name known to the patients and public.
c. **Display name (Afr):** Insert the name as known to the patients and public in Afrikaans
d. **Practice number:** Insert the practice number of the company
e. **Office number:** Insert the telephone number of the office
f. **After hours' number:** If applicable add a number that can be called after the office working hours
g. **Website:** Insert the website of the company
h. **Email:** Insert the email address of the company
i. **Cell:** Insert the cell phone number that can be contacted alternatively to the office number
j. **Registration no:** insert the number of registration of the company (CPIC)
k. **HPSCA:** Enter your HPCSA registration number (owner of practice)
l. **Bill colour type:** Insert the colour that you prefer your appointments to change to once you have selected that they have been billed / invoiced. (Refer to calendar for clarification)
m. **Bank:** Enter the bank the company is with e.g. *Capitec*
n. **Type:** Enter the type of account the company has e.g. *Cheque*
o. **Account No:** Enter the account number of the company
p. **Branch code:** Enter the branch code of the company's account
q. **Vat No:** Enter your company VAT registration number if applicable
r. **Address:** Insert the street address and postal code of the company
s. **Agreement URL:** IGNORE

t. **Register URL:** Contact Heardat Support. Support numbers are displayed in the top left hand corner of the screen when logged into Heardat.
u. **Facebook URL:** Insert your practice's facebook page's URL
v. **Serial number:** For internal use only
w. **Expiry date:** IGNORE
x. **Registered name:** IGNORE
y. **Company logo:** Insert a picture of the company logo:

   i. Click on choose file
   ii. Choose the relevant file of the company's logo
   iii. Select *Upload Image*

14.6.2 User view rules

The purpose of this setting is to change / edit / add permissions of what certain users are allowed to see on other users profiles within a certain company or practice. The following items can be shared between users should you prefer it:

- MQA's in process
- Reminders
- Repairs in process
- Replies (SMS replies)

How to change User View Rules

a. Main user: Choose the user that you want to be able to see someone else's items.
b. Can view: Choose whose items this person can view
c. Choose the items that the main user can view.

14.7 System

14.7.1 Procedures

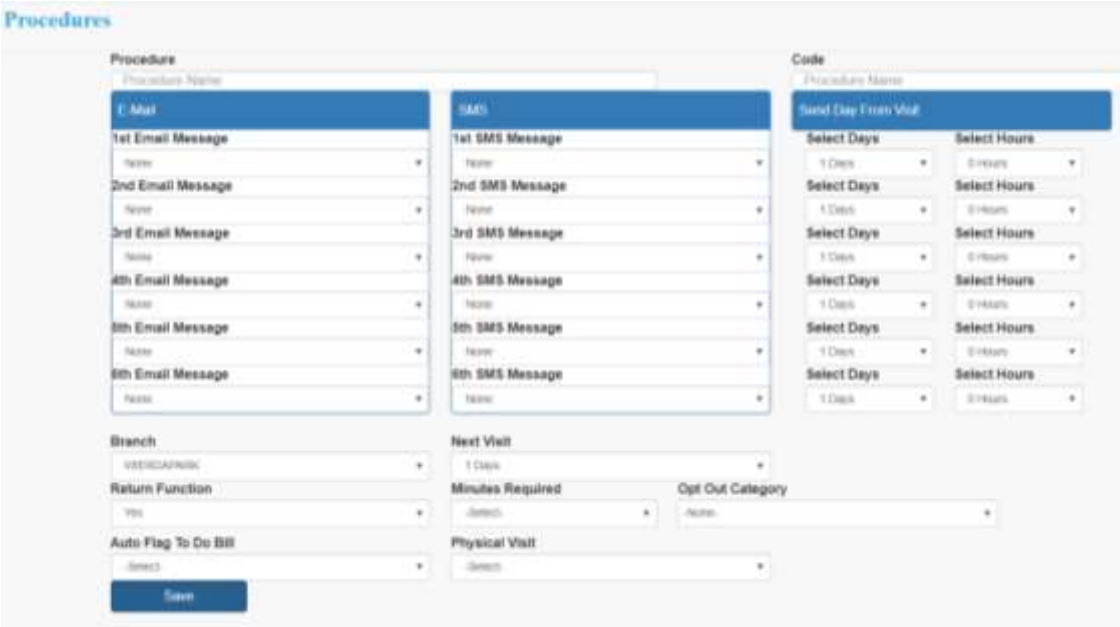
The purpose of this function is to add procedures / consultation types that will be listed in your NEW CONSULTATION SCREEN. This tab will also enable you to add communication to be sent out and scheduled that is linked to the consultation added.

How to add a procedure:

a. To add a procedure, select the *System* tab under settings and select *Procedures*.
b. Insert the name of the procedure that needs to be added under *Procedure name*
c. If it is needed to link communication to the procedure, insert the message in the applicable fields and the time period after the consultation the communication must be sent out
d. The return function enables the function to return a hearing aid and allows the system be able to select the reason for return. More.
e. Select the applicable OPT OUT category, should the patient choose to opt out, this specific category will be disabled.
f. *Auto flag to do bill* refers to whether or not to put the patient directly under the *To do* list for billing YES or NO
g. Physical Visit: All procedures are set up as either a physical consultation, a teleconsultation or no contact procedure. Select Yes if the procedure in question is a physical visit to the

practice. Select teleconsultation if it is a telehealth consultation applicable. Select no if the patient is not in the practice and you do not want the procedure to update your last visit date on the patient dashboard:

Last H/Test : 11 May 2020
Last Visit : 11 May 2020



How to edit a procedure

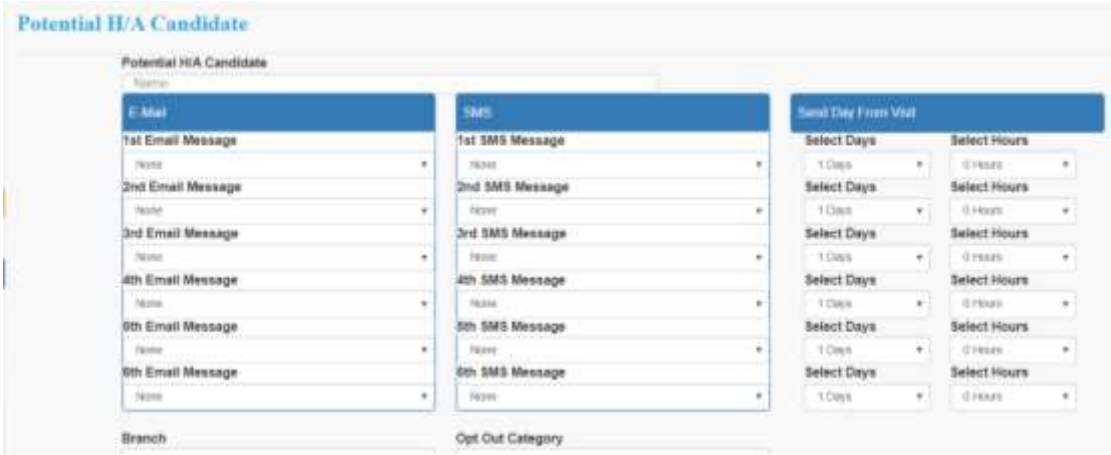
a. Scroll down to view a list of procedures currently listed.
b. Select the edit button
c. Scroll up to the listed Procedure screen
d. Follow the steps as listed in how to add a procedure:

14.7.2 Potential Hearing Aid Groups

The purpose of the section is to list a variety of possible hearing aid candidacy groups in order for them to get customised communication related to their specific needs. These options are available to select whenever a consultation is logged.

Add a new potential Hearing Aid Category

a. Add a new category in the Potential H/A candidate field
b. Choose the email / SMS templates applicable to this category that you want to be sent out after the consultation has taken place and choose the time that you want this communication to go out after the initial consultation



How to edit a potential Hearing Aid Candidate

a. Scroll down to listed categories
b. Select the applicable category
c. Click on the last button: 
d. Edit / Change the desired fields
e. Save the changes

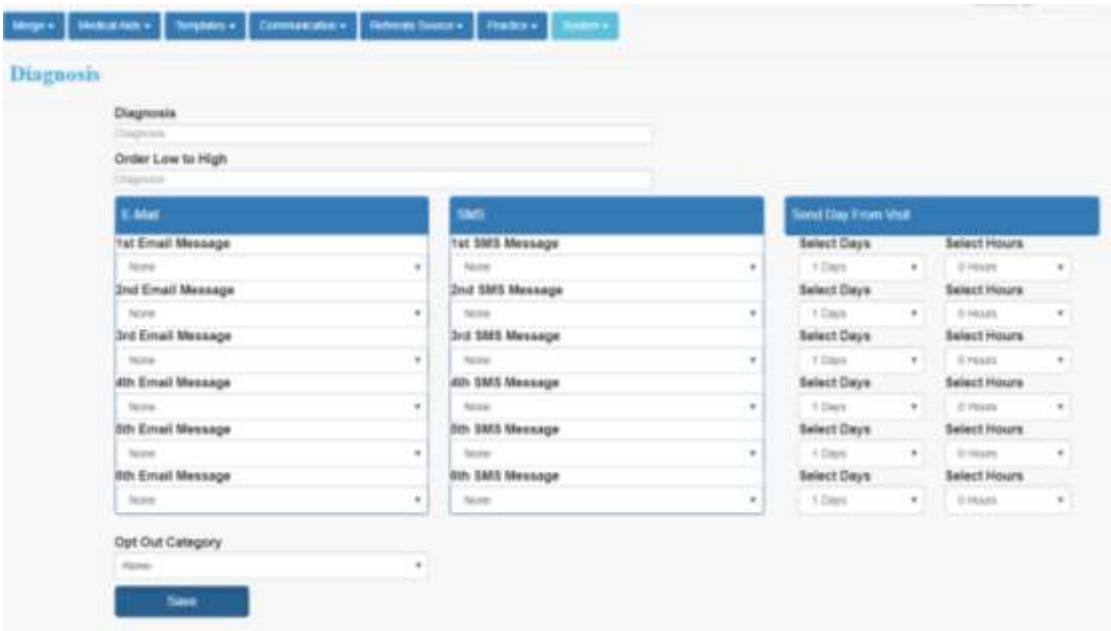
14.7.3 Classification

Add a classification

The classification field is used for classification purposes of the patient classification / needs. The purpose is not clinical diagnosis, but a marketing & communications related filter.

How to add a new classification and link communication to the classification, select the System tab under Settings and select Classification.

a. Insert the classification name
b. Insert the applicable communication templates linked to the specific classification and time period after consultation linked to classification that it should be sent out.
c. Choose the category, should a person opt out for these types of messages – which category should be opted out from. *Out Category*.



14.7.4 Fitment Providers

The purpose of this function is to be able to choose on a patient's profile who the hearing aid provider was that he/she received his/her hearing instruments from. This is selected in the hearing aid information tab. Add / maintain this list as follows:

Add a fitment provider

To add a fitment provider, select *System* under *Settings* and select *Fitment providers*.

a. Type in the name of the fitment provider
b. *Save* the changes made

Edit a fitment provider

To edit a fitment provider, scroll down to where you find the provider you want to edit

a. Select the last button in the row
b. Scroll up to the fields, edit details and save

15. Opt out option

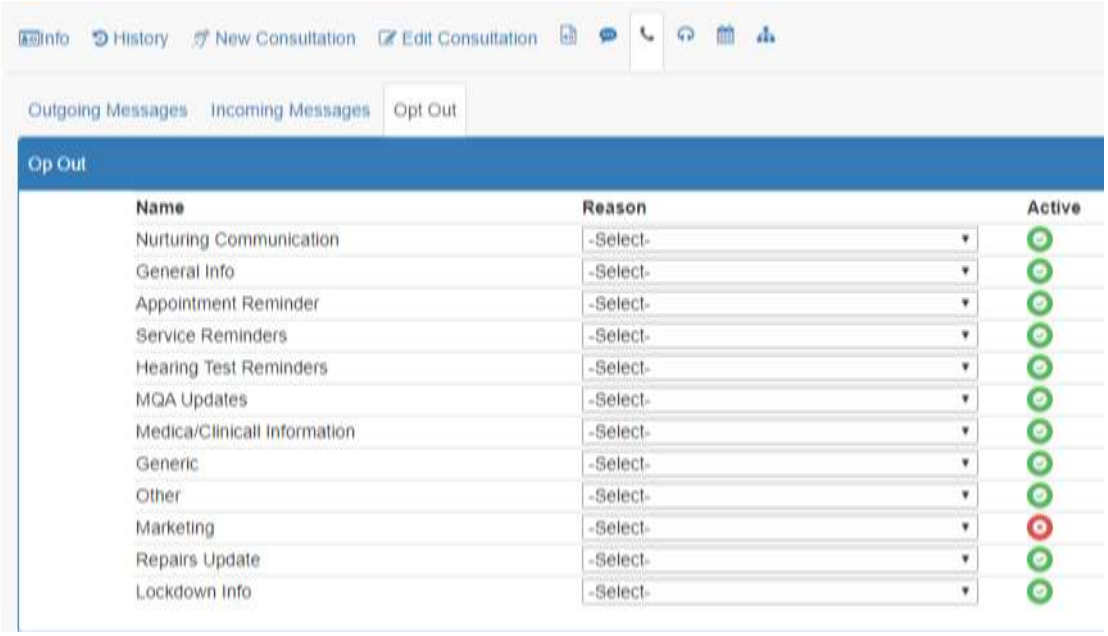
Opt out functionality is the option where a patient can choose to stop all or certain communication from the practice. There are various ways to disable communication to a patient:

How to stop patient communication

- When a patient has passed away, choose 'deceased' at patient information at the 'status' field.
- When a patient request to receive no further communication from the practice – navigate to patient information and select 'none' at preferred comms.
- When a patient clicks on the unsubscribe link in communication, that category of communication will be stopped.

Opt out categories

All communication is set up to fall in a certain category – when the patient selects to unsubscribe to a specific SMS/ email – only that communication category will be stopped. This can also be changed manually in the communication tab on a patient's profile. See the image below. A green button means that category is active, whilst a red button is inactive.

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