

heardat 
success simplified



USER MANUAL FAQ'S

VERSION 2.1

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Introduction

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!

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!

Getting used to a new system comes with trial and error and questions will surface. At times you need something done fast and it can take time to go through the manual. Hence we thought it best to set up a document with all the frequently asked questions from all of our clients.

The wonderful thing about Heardat is that it is constantly being developed, updated and improved to suit your needs! This does however imply that certain aspects are not always updated in the manual and nor the FAQ's.

We will aim to keep both of these documents updated as frequently as possible and the latest versions will be available on the Heardat website. The link should also have been sent to you by Heardat Support

Please feel free to contact us should you require any support that is not provided by the manual and the FAQ's and if a question is not on here that you feel is a need to know, please tell us so we can add it.

General

Technical questions

- 1. What requirements do I need for Heardat?**
 - Heardat is web-based and can be used from any internet browser but we recommend that you use Google Chrome.
- 2. Do I need to install anything to be able to access Heardat?**
 - No. All you need is Google Chrome. We do have a mobile application for Heardat which you can download from Google Play Store or the iPhone App Store. This app is currently mainly used for the calendar function on your mobile device, but will be progressively developed into a more comprising application. It will very likely never entirely replace the web interface.
- 3. Will my data disappear if the system crashes?**
 - Absolutely not. The system is run from 3 servers of which we can't go into much detail on due to security reasons. Thus if one of them crashes the other two are still up and running
- 4. Is Heardat POPIA compliant?**
 - Yes. Since we are working with medical information (Level 2 security info) every detail is stored securely and is only disclosed to your practice's users and Heardat staff for support reasons. The patient is also notified of this in the Terms and Conditions and the patient will have an option to consent to this as well as you communicating to him/her and should he/she at any point not want to receive this communication they are able to unsubscribe.
- 5. When will the billing be integrated?**
 - As soon as possible. The Heardat team is working around the clock to get this feature up and running as soon as possible.

Communication

- 6. Why didn't an SMS or email send from the system?**
 - The reasons an SMS or email possibly didn't send is the following:
 - There is no cell phone number or email address on the patient's profile
 - You are out of SMS credits
 - The wrong email address is on the patient's profile
 - The email address on the patient's profile no longer exists
 - The patient's cell phone number changed.
 - There are spaces in the cell phone number on the patient's profile.
- 7. Can patients reply on the emails sent from the system?**
 - Yes. These emails will go directly to a specified email inbox. This email can also be replied to.
- 8. Can I reply to the email sent to me notifying me of an SMS reply?**
 - No. The patient will have to be answered via the Heardat system.
- 9. Can a patient reply to an SMS?**
 - Yes. This SMS reply will display under the receptionist's to-do's, will be visible under dashboard, can be found under the patient profile and the receptionist will receive an email with these replies.
- 10. How long does it take for SMS's to go out?**

- Depends on the network. If it is busy, the SMS's will take up to a day for every patient to receive the SMS, should it be bulk messaging. When a certain SMS is created to be sent on a specific time, the patient will receive this SMS on that time.

11. How long does it take the emails to go out?

- If it is bulk emails going out to the whole database, only 150 emails per hour goes out because more than that will be seen as spam and could be blocked.

12. Can I design my own emails?

- Yes. We use MailChimp to design and export the mails onto Heardat in Html code. Should you require further assistance or would like to find out more, you are welcome to contact Heardat Support. If you request the Heardat team to design a mail for your practice, please refer to our support policy for the pricing.

13. Do I have to manually send out SMS's if I make an appointment?

- No. These reminders are automated.

14. Do I have to activate any of the birthday or welcome communication?

- No. This is all automated

15. Does the WhatsApp link work?

- No, we aren't able to integrate with WhatsApp fully, however the WhatsApp feature will direct you to WhatsApp Web. A cell phone number using WhatsApp will have to be connected to WhatsApp Web.

Login

16. What link can I use to access Heardat?

- <https://heardat.co.za>

17. How do I log out of Heardat?

- At the top right you will see this icon: 
- If you click on it there will be an option that says "Logout". If you click on it, you will be successfully logged out.

18. I forgot my password

- 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.

19. I forgot my username

- Contact Heardat Support

Practice dashboard

20. What is the difference between today's reminders and user reminders?

- Today's reminders refer to the reminders you have set for yourself for current day
- User reminders refers to all the users in the practice's reminders set. Here you are able to see all reminders in the practice that are still due depending on your user clearance level.

21. What is the difference between Appointments and Consultations logged?

- Appointments on the dashboard will refer you to the day's calendar so you can see what appointments have been made for the day
- Consultations refers to the patients that have been seen by the audiologist and that the audiologist has logged on the system.

22. What is the difference between prospective patients and the total patients?

- Prospective patients are patients that have made an appointment or participated in a marketing campaign that your practice ran and you have his/her contacting details but this patient has not seen the audiologist yet so thus has no **classification** loaded and is saved under the prospective portal.
- The patients that did see the audiologist and had a consultation logged falls under patient portal, since the patient will now have a **classification** loaded under his profile

Patient Portal

Loading a new patient

23. Why is the cell no. and email so important?

- It is important so the system will be able to send nurturing and marketing communication to the patient. This is critical in the functionality of any CRM system!

24. Why is it necessary for the gender, language and title?

- Once again for communication purposes. A patient will want to be able to receive communication in his preferred language and many people are very sensitive about their title.

25. Is the religion field mandatory?

- No. It is for when your practice wants to send out communication on religious holidays but it is not mandatory to use this feature.

26. Why does my screen turn red when I click on save?

- It means that there is a field missing or that the same ID number already exists on the system.

An existing patient's profile

27. Will a patient receive the reminder set up on his profile?

- No, this reminder is set up to remind a user in the practice of the task

28. What do I do when a patient is deceased?

- Search for the specific patient and enter his profile
- The second last dropdown on the left hand side under the patient info is "status"
- Change the status from live to deceased.
- In the patient list this patient will be flagged with a red block and a white star shape in the red block.

29. What patient details can I use to search for the patient?

- You can search for the patient by searching for the patient's:
 - Name
 - Surname
 - ID no.
 - Cell no.
 - Acc. / File No.
 - Member No.
 - Email address

30. How do I add a hearing aid model that isn't on the system?

- Due to technical reasons only Heardat Support is able to load hearing aids onto the system. You are more than welcome to contact Heardat support for any assistance in this regard.

31. Why isn't the insurance certificate generating?

- Your pop-ups might be blocked. You can unblock them by doing the following:

- If nothing happens after you selected *Generate*, there should be an icon with a red cross on the right hand side of the browser.
- Select this icon and choose the option that allows Heardat to open pop-ups
- Retry generating the insurance certificate

32. Is it possible for duplicate patients to be loaded on the system?

- No. The system does not allow two patients with the same ID numbers to be loaded on the system. If it does so happen that two of the same patients are on the system, they can be merged so no data goes lost. Consult the Heardat Manual should you require to merge 2 patients.

33. Why can't I edit all consultations?

- For security and ethical purposes. When a patient does not agree with the specialist he/she has seen, the specialist won't be able to quickly change a consultation when a problem occurs. The last consultation can be edited mainly for hearing aid purposes.

To-do's

34. How do I remove a task from my to-do's if I completed it?

- Right-click on the task at hand
- Click on "complete"
- The task will be removed

Calendar

35. Can I view a single audiologist's appointment on the calendar?

- Yes. A list of all the audiologists of the practice is displayed on the left-hand side of the calendar. You can view a single audiologist's appointments by unticking the rest of the audiologist's names

36. Can I search for a patient on the calendar?

- Yes, you can search this patient's name in the search bar and only his/her appointments will display on the calendar.

37. A new patient I made an appointment for isn't on the system. Why can't I find him/her?

- The patient is on the system, but he can be found under the prospective portal until his classification is changed.

Diagnoses, procedures and potential H/A candidate

38. Can I add a diagnosis?

- Yes. Select the System tab under Settings and select Diagnosis.
 - Insert the diagnosis name
 - Insert the applicable communication templates linked to the specific diagnosis and time period after consultation linked to diagnosis that it should be sent out.
 - Choose the category, should a person opt out for these types of messages – which category should be opted out from. *Out Category*.

39. Can I add a procedure?

- Yes; To add a procedure, select the *System* tab under settings and select *Procedures*.
 - Insert the name of the procedure that needs to be added under *Procedure name*
 - 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

- The return function enables the function to return a hearing aid and allows the system be able to select the reason for return. [More.](#)
- Select the applicable [OPT OUT category](#), should the patient choose to opt out, this specific category will be disabled.
- *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
- 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.

If you have any more questions you are welcome to contact Heardat Support. Let us know if you think there is a question that need to be on here. We appreciate the feedback!

Send us a WhatsApp, email us or call. You are more than welcome!



heardat



support@heardat.net
pa@heardat.net
info@heardat.net



082 222 6668 | 076 650 0224 | 071 461 5152



076 650 0224 | 060 310 1276