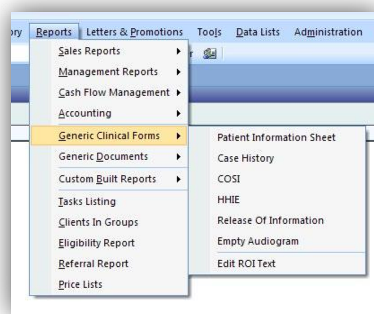
Using the Ear Works 4 Recommended Clinical Workflow

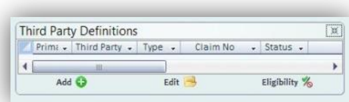
The premise of Ear Works software is that you only do something once and the related actions are automatically done for you. For example, when you create an order it automatically creates a progress bar of actions so everyone knows where the product is – from initialized to ordered, received, checked, fit, in trial and satisfied. This is a visual graphic on the patient file. When you do a test, the invoice generates automatically. When an aid is marked as satisfied, it goes to billing, taking third party rules into effect, putting the invoices in the AR list and all you do is select them and click print to bill them. No more paperwork. No more multiple actions for each task you have. Let's go through a typical day.

Patient Arrives

When the patient arrives you'll need some intake forms printed. Blanks are available in this Reports menu. Print what you need. Some clinics will have the patient complete the patient info, HHIE, case history and ROI forms before handing them to the clinician and/or entering them into the system. Each form has a corresponding area in Ear Works to enter them into. The clinical docs are in the patient's documents page.



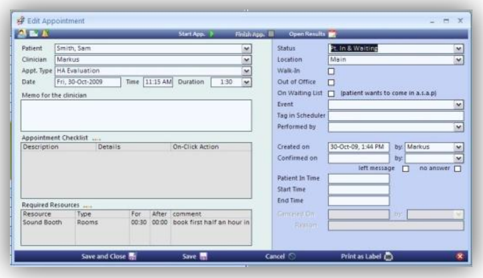
In the schedule, right click on the patient appointment and choose "patient in" to alert the clinician that the patient is in. This will change the patient name to italics with an indicator arrow beside it to show that the patient is ready. The clinician can now do the test.



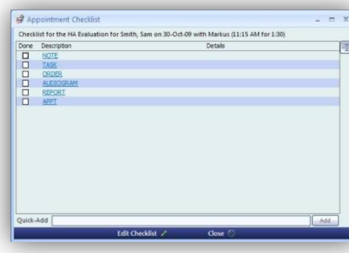
In the meantime, the administrative support will check eligibility for the patient. In the patient file, go to the third party pane and add a third party. Enter their number. Check their eligibility by contacting the relevant third party or using historical data. This will be important as any billings will use the respective third party rules to create tasks, forms, invoices, etc.

Did you know that you can order using a selection tool (all products comparatively presented), favorites (previously ordered aids just the way you like them in 1 click) or by filling out the order window?

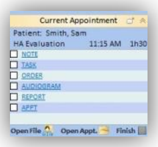
Clinical Appointment

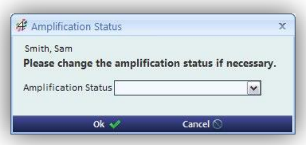


Now the patient is with the clinician. The front staff doesn't have anything else to do for the time being. The clinician first clicks on the patient name in the side bar which opens the "edit appointment" interface. Here you can read the memo for the clinician that the admin folks type in when making the appointment to get some context. This stays with the appointment for future reference. Just click "start appointment at the top of that window to begin – it opens the patient file and the checklist. The idea behind checklists is that there are standard actions for every kind of appointment. By having them all in the linked lists – checklists – the clinician does not need to go to the products area for entering products, the service area to enter services, the notes are to enter notes. Instead, it's all right there.



The Audiogram is point and click, text-type or pull-down menu based for entry. There is a second page for a quick-report that is optional. The when saving and closing the audiogram, the system will ask what kind of test it was and assign billing accordingly, on the right forms, using the right prices, etc. That invoice does not need to be created manually. Furthermore, it adds to the stats reports to tell you how many times you did a certain test. This test can be printed professionally or using the AAA "picture audiogram". From the checklist you can create an order, enter notes, and do whatever it is you do without the need to navigate and find the necessary forms in the software. When you're done, click finish in the sidebar, which, incidentally, also shows the checklist so that



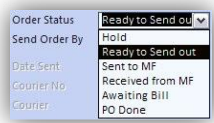


You may get a smart feature called "Amplification Status" this is a quick tag on the file that categorizes it however you want, and can use at any time as a marketing tool – for example, you could have "tire kickers" in there and then send a letter to all those "tire-kickers" when a fabulous new product comes out that may just be the thing for them. If the status is "will think about it" and not "has hearing aids" and then a few months later they order something, that order triggers this smart feature to pop up so you can change it from "thinking about it" to "has hearing aids". That way this marketing data is never really out dated and always useful.

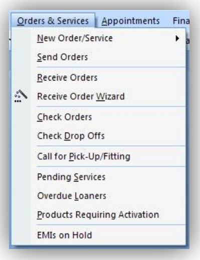
can be closed or minimized during the appointment. You're done and can click on the next patient in the day planner in the side bar and then start, do the checklist items and finish.

Ordering, Sending and Receiving Product

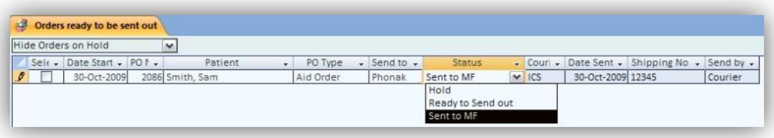
Ordering product is initiated by the clinician. The clinician can make an order from the checklist or the new items list in the toolbar or the



service pain in the patient file. However you like it, you can then email the order if no EMI is needed or print and send it with an EMI. The order status can be set to "on hold" and that way it doesn't show up in the sales reports. It is, however, at "ready to send out."



This means that it automatically goes to the send queue. This can be linked for the admin folks or whoever does shipping in their daily tasks or accessible from the "orders and services" menu at the top of the screen. It's the second item in the list called "send orders."



This is the send queue. Here, you pack the box, fill out the waybill for the courier and change the item's status to "sent to MF" which pops in today's date and all you type in is the tracking number. Done!

Here are a couple of tools you should know about that make using Ear Works easier.

Document Bar

Minimized items are moved to the bottom of the screen. A bar opens up and creates a thumbnail of the minimized item. It can be rolled over to see what it is and clicked to open up again.

Side Bar

The side bar shows your daily plan if you're a clinician or your daily duties if you're not. It shows you the stacks of stuff you created, your tasks and messages and at the bottom a quick note tool to use like post-it notes.

Tool Bar and Menu Bar

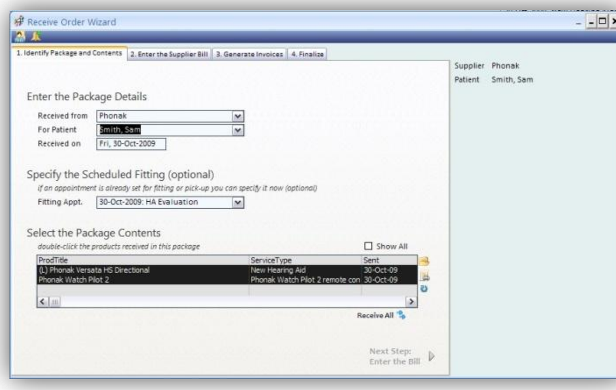
The tool bar has commonly used buttons including new items and search tools, and even desktop enhancements to give you 4 different workspaces. A quick entry search field is there too to find a patient fast.

Tabbed Pages and Panes

The patient file has tabs (pages) on the left that you can edit with the little wheely-icon at the top left corner. Put whatever panes you want wherever you want, unless there are some restrictions. The panes can then be moved around and organized however you like them. See everything you need at one glance!

The status of the aid in the patient file is now "sent" so if anyone is wondering where it is, you'll know!

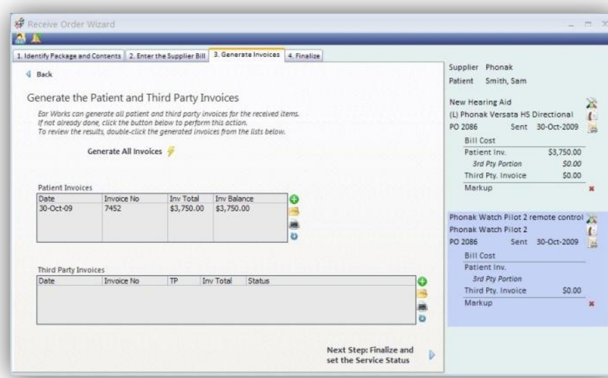
A few days later, you get a box in the courier bag and need to receive hearing aids. This is where you use a cool little wizard that receives product, queue's it and creates AR and AP.



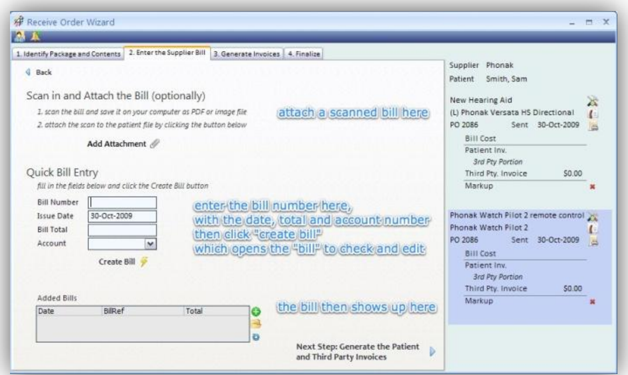
Let's take a look at the Receive Order Wizard available in that "orders and services" menu or in the daily duties checklist for the person responsible if you assign it there.

This wizard has 4 steps that you can see in the tabs at the top. The first step is to identify what you're receiving. Select the manufacturer and the wizard filters the patient list to only those patients expecting a product to come in. Select the appropriate patient and it populates the things that should be in the package. Make sure its all there and click "receive all". That populates the wizard's side bar with the financial stuff. You're ready to click the "next step" button or click the tab at the top for step 2.

In step 2 you simply scan and attach the bill. Why? Because you're paper free! This way the PDF of the original bill is always accessible from the attachments pane in the patient file as well as being linked to the bill. If you ever search for this bill using the bill number and extensive detailed search tools you can actually view the original too!

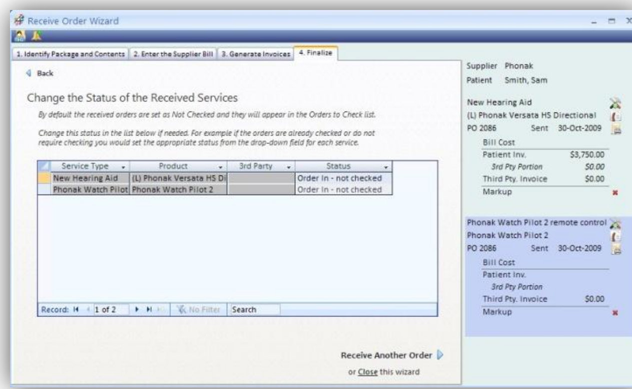


The image shows the next steps – scan, enter 3 fields, check the bill that pops up and when it does, it will ask you for serial numbers and details on the aid that will be saved in the patient file. If it's a repair, it will ask what was done to it at the factory for future reference. The bill will then show up at the bottom, the right sidebar info will be updated and you're ready to go from AP here to AR in the next step.



The next step first asks you "do you want to build all invoices?" Of course you do because the system knows all third party rules, codes, prices etc you don't need to think about it. Just create the bill. If its cost-share, it'll know that too. Its nice being smart! If you clicked "no" then you can click "generate all invoices" in step 3. In other words, it's pretty hard to mess things up in Ear Works.

Once you click the next button it gives you information about required tasks and forms if there are any. For example, some third parties expect certain calls to be made, forms to be signed or due diligence tasks to be done, they will be listed here. If your clinic has a policy for private-pay patients to receive a phone call a few days after fitting, this can be standardized, and the task listed here. If you need a form to be in the fitting tray that your clinic wants in there such as AR letters, cleaning instructions or information about adaptation and binaural benefit, you can standardize that for every received aid to show these forms which can be printed from here and put in the tray. If there are not tasks and forms, Ear Works will skip this step and show the last step – status. Do you check hearing aids before fitting them? Do you need to call? Ear Works will check to see if there's a fitting appointment for the patient. If there is, it will know and not place it on the automatic call queue. Either way, whether you call or just hold for the fitting appointment, the first thing is to check the aid. This status puts the product in the clinician's check aids



Name	Service Type	Product	Received	Check	DateCheck	Send Ba	AppNeec	Note	Fitting boc
Smith, Sam	New Hearing Aid	(L) Phonak Versata HS Directional	30-Oct-2009	☑	30-Oct-2009	☐	☐		30-Oct-2009
Smith, Sam	Phonak Watch Pilot 2 r	Phonak Watch Pilot 2	30-Oct-2009	☑	30-Oct-2009	☐	☐		30-Oct-2009

cue from where they can mark them as checked – whether you do a listening check, ANSI or simulated real ear – in which case once marked that way they go automatically to the status of call (if there's no fitting appointment in the schedule) or to awaiting pick-up/fit. Get there by choosing "check aids" from the same old "orders and services" menu item.

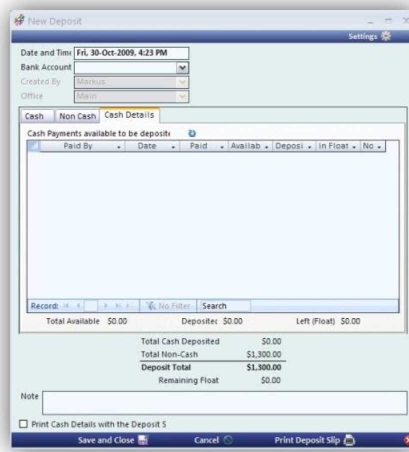
The trays are physically never moved, but their status changes as actions are taken without anyone having to go into the system to change a status. Its an Ear Works benefit – you do something that you'd do anyway, and the system updates the corresponding information.

The receiving process is now done. The clinician goes into the file when the fitting appointment begins and clicks start, uses the checklist to enter progress notes for example, and then clicks finish. The system then alerts the clinician that at the end of the fitting, the aids should be fit, and hence marked as fit. So the clinicians clicks "fit all" and done! The aids are now in trial and the system knows it.

A similar thing will pop up when a future appointment is marked as finished and the trial has not been completed. This is satisfaction. Without satisfaction, the process is not done. In fact, it may prohibit the aid for some third parties to be billed! So to make sure those busy clinicians don't forget, this thing pops up and once marked as satisfied, the aids are billable. If its private pay, a red text flag shows at the bottom of the window showing the remaining outstanding balance to make those accounting types happy.

Financial Fun

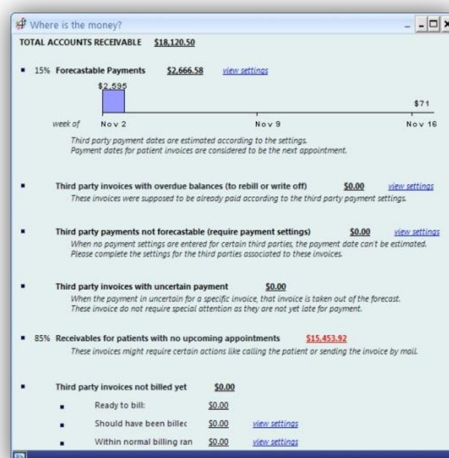
So you're ready to bill. Well, billing is divided by third party and private pay. The private payments can be taken in whatever form you like including points that you can assign value to. Hence, if 1$ spent earns X points, they have a financial value. So patients can use them to donate, share or pay for product. Payments can also be put on payment plans and when payments are due, they alert the person responsible for depositing the check or billing the credit card. For you Americans out there, there's even integrated Care Credit applications and payment plans (no longer available in Canada).



Ear Works does your cash count, deposit formatted for your bank book you no longer need, and reports all received payments, keeps history of every transaction and exports to QuickBooks. All your AR and AP get transferred. Even though Ear Works has a multi-level P&L that shows you profits by profit centre (molds vs hearing aids for example), the financial reporting tools in QuickBooks are designed for this kind of thing. Ear Works reports are more functional to the industry whereas QuickBooks reports are designed more for the accountants.

If you save your signature in the program (secure), and enter your AP billing methods, such as an Air Miles credit card, you can then use that to make payments. When the manufacturer statement comes in, Ear Works has an easy reconciliation and payment tool to help you choose which bills to pay, which credit memos to apply and how to pay it. The remittance report is the resulting payment as it will have your credit card, signature and authorization on it to email (PDF) or print and send (mail/fax) to the supplier. Ear Works also keeps track of credit memos outstanding. If a product is returned it will warn you that a credit memo has not been received until it has been received and entered. So you can rest easy, your positive AP will not be lost in the shuffle!

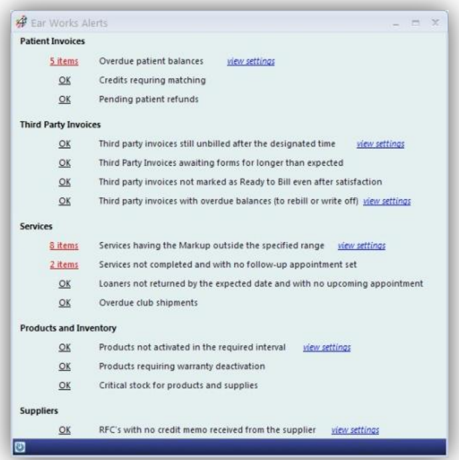
Third party billing is easy. Simply choose “send invoices” in the “financials” menu’s “third party” item and select the third party you wish to bill, then the invoices you wish to send, print a summary and then print the invoices. Its all formatted and ready to go.



Sometimes you have to write things off and clear your books if third parties don’t pay on certain codes. There’s a write-off builder, which is a wizard that identifies the orphaned payments and allows you to rebill or write them off altogether!

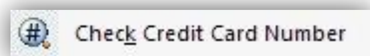
And the financial fun continues with tools. The “finding the money” tool shows you what to expect in terms of cash flow (but there are also really easy to read and use cash flow reports) based on the usual billing terms of different third parties. If you want to keep an eye on the trends in the clinic, this unique tool is great!

But you need more than just a picture of the financial situation. You need a tool that shows you what’s wrong in the company, what’s fallen through the cracks and what needs to be addressed – in interactive get-it-done interfaces rather than a static report.



Then check out Alerts – the tool that tells you what you need to do to make sure things stay in order. From missing credit memos to outstanding payables and receivables, loaners that haven't been returned to when you're low on batteries for resale. If you use Clubs such as a battery club, it will alert you when you're overdue. The clubs shipment list will be assigned to someone who will see it in their administrative daily duties. So this is more of a way to make sure its all getting done. Each area that has issues is identified by a red link. This link opens a list. The list is interactive – you can click open file, view invoices, or do whatever, and immediately get work done rather than having to open the file, find the section you need, and then do something there.

And there's some fun stuff too that's pretty practical. Have you ever wondered if a credit card you get is legitimate? Then use the Check Credit Card Number tool and it will verify whether the number is legit.



Marketing and Promotions

Of course you want to market your clinic. So you have several cool tools for that too.

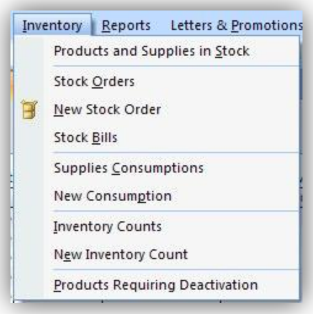
Clubs are available for tracking shipments but it goes beyond that – why not have an Executive Club and charge for it – busy patients would jump the walk-in queue, get courier service to and from their office when their hearing aid breaks down and perhaps some free stuff. They'd pay for that! So now clubs are not a service anymore, they're a profit centre and fully tracked and managed in the software.

Mailers can be done from task lists and from the data-mining tool. You can search the system for just about anything and send specific marketing letters or do recalls to just about anyone for any reason.

Events can be managed from the Event Planner which will report your event's return on investment. If you spent $20,000 on the event, and you link each patient to the event, their transactions show up and you can see how well you did!

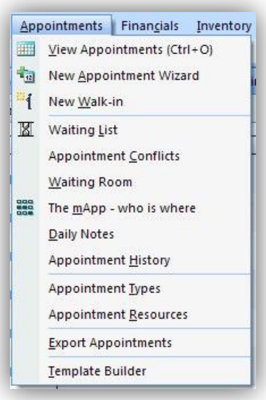
Mining your database has never been so detailed, easy and effective!

Inventory

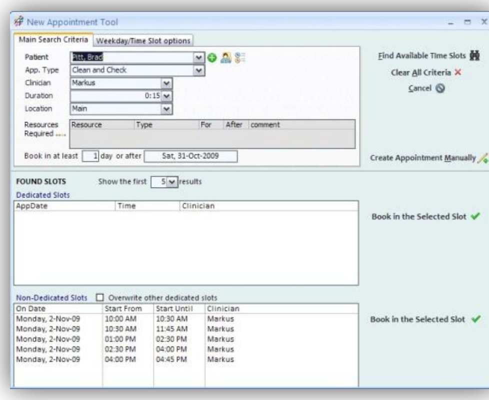


Ear Works has a very cool product management system. There are bulk products for resale, products with serial numbers, and supplies in stock. Products with serial numbers can be demos, loaners or stock items and products for resale can be bulk-purchased open fit product. Your batteries, tubes, supplies and all that lab stuff can be here and alerts will tell you when you're low. You simply do a count and every time you do a retubing or sell a battery, it will deduct the item until you get to the pre-set (you decide) critical level at which time you re-order! When you loan a hearing aid, it reminds you to get it back and asks you if you want to create an invoice for it.

Scheduling

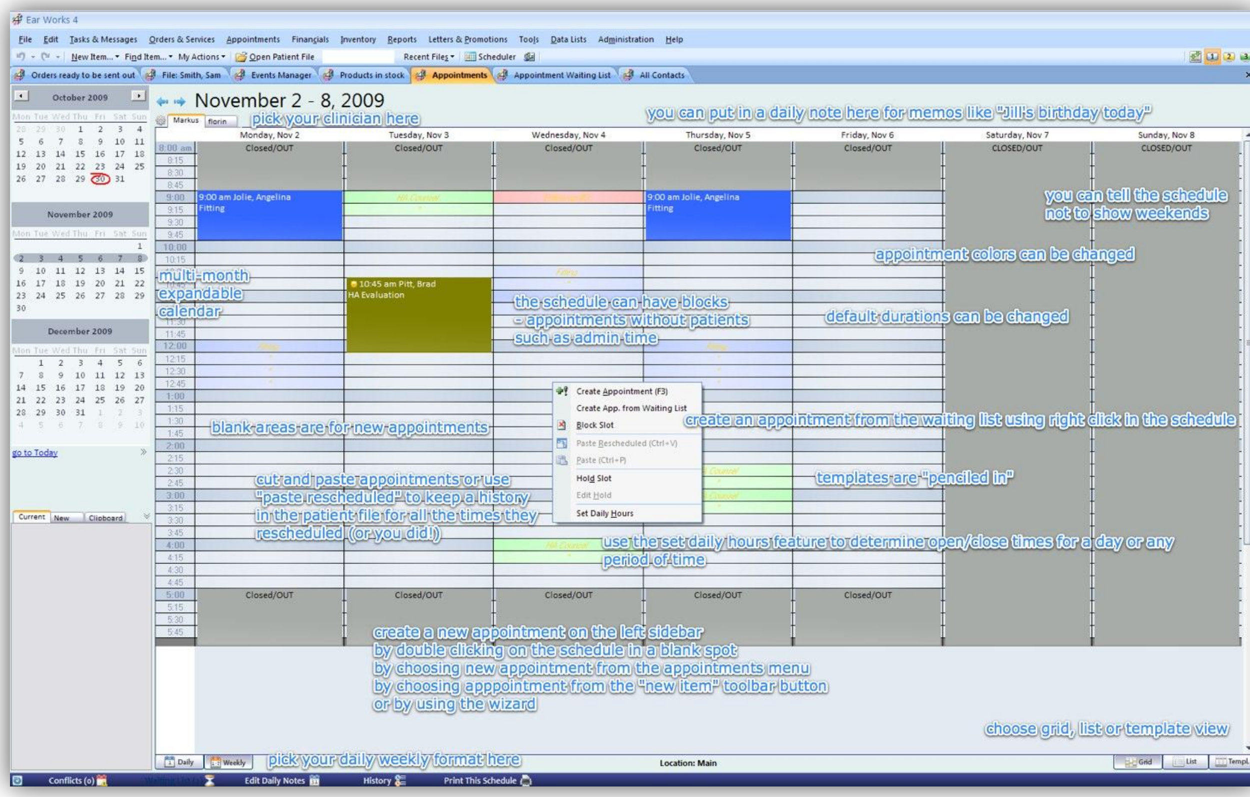


The schedule is really easy to use and has great features. First, you can use a wizard or a standard scrolling view to make an appointment. The wizard allows you to choose a patient, appointment and clinician and the preferred patient day of the week and time and it will find the next available appointment for you. The wizard respects the template – which is the pre-allocation of time for profitable appointments. Say you wanted to make 70 sales next month. You'd go into the template builder and enter 70 sales. Based on your sale/appt and monaural/binaural hit rates, it would determine how many tests, fittings and follow ups you'll need to make this happen. You can then assign this to different clinicians and manipulate other variables. The template "pencils in" these appointments and if filled with the corresponding appointment, you'll make 70 sales! Its all in the norms. So the wizard knows this and would not suggest a clean and check during a template fitting time. But you get the power – the wizard shows spots that are assigned for the appointment type you are asking for and other spots that aren't – so you make the decision!



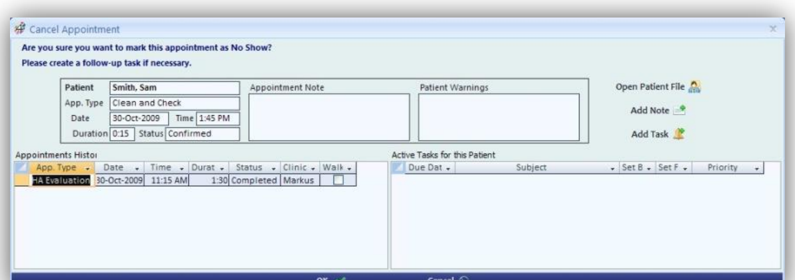
EAR WORKS

The schedule also respects resources. If you have two clinicians and one booth, it will alert you when there's a conflict and you won't schedule two tests at the same time with different clinicians. You can use any thing – room, equipment, whatever, as a resource.



The schedule also shows the waiting room. In this feature, when a patient is marked as in or a walk in is entered, they show up in the queue for the clinician they're assigned to. This gives clinicians a pretty clear picture of who's waiting out there.

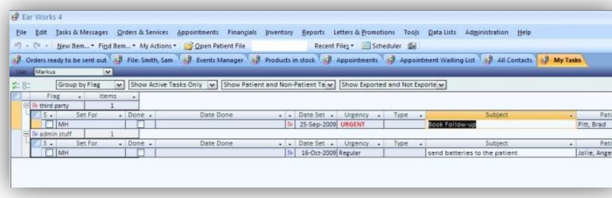
There's also a grid and list view – the grid view looks like a normal schedule with colored boxes and all that. The list view is just that – a list, but it shows everything. If there's a cancellation the system removes them from the grid but keeps them grayed out in the list – so you know everything that happened that day. You also have a weekly and daily view and can view schedules by office!



If there is a no show, cancellation (by clinic or patient), or the patient left early, this is identified in the schedule with a right click on the appointment slot. A window pops up that asks for a note (explanation) and task (follow up) and then opens the waiting list to give you the opportunity to fill that slot. That way you don't have things falling through the cracks!

The map tells you where everyone is in the office. So if Jack is signed in to Ear Works in the lab, you can see that on the map and then go there to talk to him. No wondering where Jack's at!

Tasks and Messages



Ear Works is all about communication. You can set a task for someone – even yourself – for any reason and its linked to the patient file. Say you had a question about a bill. You attach a scanned copy to the file, open a task and link the attachment to it. Then set that task for the administrator and they can see what you're talking about. They can reply or forward it and a thread is created. If this is a complicated issue, all the history is there for all the future! When its done, its done! You can flag them, categorize them, group them, and do all sorts of things with them, even get them done!

Messages are quick communications that pop up on the designated user's screen. Get me a form? Message the administrator and they'll get it for you! Maybe.

Other Cool Tools

Nothing is ever lost in Ear Works. There's an undelete tool for that. Need to transfer Jack's tasks to Jill? There's a tool for that. Need to merge a file because you somehow got a duplicate? There's a tool for that. Ever wonder how efficient your staff is at doing their job? There's a report for that. Ever need a backup restored? There's a tool for that! Ever need to import data from another system? Yes, there's a tool for that too. Ever wanted to create searchable multiple case histories or do the QuickSIN or review an old APHAB or COSI? You got it, there's tools for all this! Ever search for a file you can't remember the name of and know you saw them last Tuesday morning but you just don't want to bother with the schedule? There's a tool for that. There's pretty much a tool for anything you've ever wanted to do with your clinic and patient information. And if there isn't we'll build it. Updates are free within the same version!

Closing Time

We hope this overview has been helpful. Miss anything? Let us know. Email info@earworksinc.com or visit our websites www.earworksinc.com or www.earworksapps.com. Thanks!