









Ear Works 4 Cheat Sheet







Remember, in Ear Works 4 you can use the **Ear Works Guide** which is essentially an interactive cheat sheet. To open the Guide press F1 from any window in Ear Works 4.S

| GENERAL | Add/Create  | Open/Find  | Notes |
|--|--|--|--|
| Patient File <i>container of all the patient info and related items</i> | <ul style="list-style-type: none"> · {Patient Selection} window -> [New File] button · {Scheduler} window -> (New Appointment) pane-> [New File] button · {New Appointment} window->[New File] button | <i>toolbar:</i> Open File, Quick Search Box, Recent Files <i>toolbar:</i> Find Item... > Patient Search <i>shortcut:</i> F3 (generic Search) | Use the <i>Patient File</i> button on the top-left corner of item windows to open the file. |
| Tasks <i>to-do item for delegating and scheduling actions</i> | <i>shortcut:</i> Ctrl+Shift+T <i>menu:</i> Tasks and Messages> New Task <i>toolbar:</i> New Item...>Task <i>file panes:</i> Current Tasks, Tasks | <i>menu:</i> Tasks and Messages > My Tasks <i>toolbar:</i> Find Item... > Task Search <i>file panes:</i> Current Tasks, Tasks <i>side bar pane:</i> Tasks <i>shortcut:</i> F3 (generic Search) | Use the <i>Task This</i> button on the top bar of item windows to create a related task |
| Progress Notes <i>timestamped memo for logging various patient related info</i> | <i>shortcut:</i> Ctrl+Shift+N <i>menu:</i> Tasks and Notes> New Task <i>toolbar:</i> New Item...>Task <i>file panes:</i> Current Tasks, Tasks | <i>toolbar:</i> Find Item...>Progress Note Search <i>file panes:</i> Progress Notes <i>shortcut:</i> F3 (generic Search) | Use the <i>Note This</i> button on the top bar of various item windows to create a related note |
| Messages <i>communication item between team members; doesn't have a to-do nature</i> | <i>shortcut:</i> Ctrl+Shift+M <i>menu:</i> Tasks and Messages> New Message <i>toolbar:</i> New Item...>Message <i>file pane:</i> Messages | <i>menu:</i> Tasks and Messages > My Messages <i>file panes:</i> Current Tasks, Tasks <i>side bar pane:</i> Messages | For all To-Do's use Tasks instead of messages. Use the messages only to communicate with team members. |
| Hearing Aid Info <i>details on the hearing aids used by the patient</i> | <ul style="list-style-type: none"> · To order a new aid see the Hearing Aid Order below · To enter the information for an existing hearing aid: <i>file panes:</i> Current Aids, Hearing Aids | <i>toolbar:</i> Find Item > Hearing Aid Search <i>file panes:</i> Current Aids, Hearing Aids <i>shortcut:</i> F3 (generic Search) | |

| CLINICAL | Add/Create  | Open/Find   | Notes |
|---|---|---|-------|
| Hearing Tests <i>Audiograms and related info</i> | <i>shortcut: Ctrl+Shift+A</i> <i>toolbar: New Item...>Audiogram</i> <i>file panes: Hearing Tests, the Tests page</i> | <i>file panes: Hearing Tests, the Tests page</i> | |
| Clinical Reports <i>clinical documents for various purposes describing the hearing condition of the patient</i> | <i>shortcut: Ctrl+Shift+R</i> <i>toolbar: New Item...>Report</i> <i>file pane: Clinical Reports</i> | <i>file pane: Clinical Reports</i> | |
| Hearing Aid Recommendations <i>a set of hearing aids recommended to the patient (includes prices)</i> | <i>toolbar: New Item...>Recommendation</i> <i>file pane: Recommendations</i> | <i>file pane: Recommendations</i> | |
| Clinical Forms <i>standard clinical questionnaires: Case History, COSI, APHAB, IOI-HA, SIN, SADL, HHIE</i> | <i>toolbar: New Item...>Clinical Form</i> <i>file pane: Clinical Forms</i> | <i>file pane: Clinical Forms</i> | |

| ADMIN | Add/Create  | Open/Find   | Notes |
|---|---|--|---|
| Appointments | <i>menu: Appointments> New Appointment</i> <i>toolbar: New Item...>Appointment Wizard</i> <i>file pane: Latest Appointments, Appointments</i> | <i>menu: Appointments> Appointments</i> <i>toolbar: Scheduler, Find Item...>Appointment Search</i> <i>file pane: Latest Appointments, Appointments</i> <i>shortcut: F3 (generic Search)</i> | To create an appointment double-click in an empty spot on the Scheduler grid. Right-click on the Scheduler grid for the full set of options |
| Letters <i>plain printable documents for the patient or regarding the patient</i> | <i>shortcut: Ctrl+Shift+L</i> <i>toolbar: New Item...>Letter</i> <i>file pane: Letter</i> | <i>menu: Letters and Mailers > Letters List</i> <i>file pane: Letter</i> | |
| Attachments <i>an computer file (e.g. a scanned document) linked to the patient file or not</i> | <i>file pane: Attachments</i> or <i>menu: File>Non Patient Attachments</i> | <i>file pane: Attachments</i> or <i>menu: File>Non Patient Attachments</i> | |

| FINANCIAL | Add/Create  | Open/Find   | Notes |
|---|---|---|-------|
| Patient Invoice <i>an invoice issued by the clinic payable by the patient</i> | <i>shortcut:</i> Ctrl+Shift+I <i>menu:</i> Financials>Patient Invoices>New Invoice <i>toolbar:</i> New Item...>Invoice <i>file panes:</i> Current Invoices, Invoices | <i>menu:</i> Financials>Patient Invoices>Find Invoice <i>toolbar:</i> Find Item...>Invoice Search <i>file panes:</i> Current Invoices, Invoices | |
| Third Party Invoice <i>an invoice issued by the clinic payable by a third party institution (organization or insurance company)</i> | <i>shortcut:</i> Ctrl+Shift+Y <i>menu:</i> Financials>Third Party Invoices>New Invoice <i>toolbar:</i> New Item...>Third Party Invoice <i>file panes:</i> Current Invoices, Third Party Invoices | <i>menu:</i> Financials>Third Party Invoices>Find Invoice <i>toolbar:</i> Find Item...>Invoice Search <i>file panes:</i> Current Invoices, Third Party Invoices | |
| Bill <i>an invoice received by the clinic from a product or service supplier</i> | <i>shortcut:</i> Ctrl+Shift+B <i>menu:</i> Financials>Supplier Bills>New Bill <i>toolbar:</i> New Item...>Bill <i>file panes:</i> Bills | <i>menu:</i> Financials>Supplier Bills>Find Bill <i>toolbar:</i> Find Item...>Bill Search <i>file panes:</i> Bills | |
| Patient Payment <i>a payment received from the patient</i> | <i>shortcut:</i> Ctrl+Shift+P <i>menu:</i> Financials>Patient Invoices>New Payment <i>toolbar:</i> New Item...>Payment {iInvoice window}->[Take Payment] button | {iInvoice} window->[Open Payment] button | |
| Third Party Payment <i>a payment received from a third party institution</i> | <i>menu:</i> Financials> Third Party Invoices>New Third Party Payment <i>toolbar:</i> New Item...>Third Party Payment | <i>menu:</i> Financials> Third Party Invoices>Third Party Payment History {iThird Party Invoice} window->[Open Payment] button | |
| Supplier Payment <i>a payment issued by the clinic to a supplier</i> | <i>menu:</i> Financials>Supplier Bills>New Supplier Payment | <i>menu:</i> Financials>Supplier Bills>Supplier Payment History | |
| Supplier Statement <i>a monthly statement received from the supplier; it requires reconciliation</i> | <i>menu:</i> Financials>Supplier Bills>New Supplier Statement | <i>menu:</i> Financials>Supplier Bills>Supplier Statements History | |

| ORDERING | Add/Create  | Open/Find   | Notes |
|---------------------------------------|---|---|-------|
| Hearing Aid Orders | <i>shortcut:</i> Ctrl+Shift+H <i>menu:</i> Orders and Services>New Order>New Hearing Aid <i>toolbar:</i> New Item...>Hearing Aid Order <i>file panes:</i> Services, Current Services | <i>menu:</i> Orders and Services>Send Orders, Receive Orders, Check Orders, Pending Orders <i>file panes:</i> Services, Current Services | |
| Ear Mold Orders | <i>shortcut:</i> Ctrl+Shift+E <i>menu:</i> Orders and Services>New Order>New Ear Mold <i>toolbar:</i> New Item...>Ear Mold Order <i>file panes:</i> Services, Current Services | " | |
| Repair & Remakes | <i>shortcut:</i> Ctrl+Shift+H <i>menu:</i> Orders and Services>New Order>New Repair/Remake/Replacement <i>toolbar:</i> New Item...>Manufacturer Repair Order <i>file panes:</i> Services, Current Services | " | |
| Loss & Damage Replacements | <i>like a Repair & Remake</i> | " | |
| Returns For Credit | <i>shortcut:</i> Ctrl+Shift+C <i>menu:</i> Orders and Services>New Order>RFC Hearing Aid <i>toolbar:</i> New Item...>RFC <i>file panes:</i> Services, Current Services | " | |
| Exchanges | <i>Create an RFC and then create a Hearing Aid Order</i> <i>See details above</i> | n/a | |
| Sales from Stock | <i>menu:</i> Orders and Services>New Order>Stock Products>Sell a Stock Product to a Patient <i>file panes:</i> Services, Current Services | <i>file panes:</i> Services, Current Services | |
| Returns to Stock | <i>menu:</i> Orders and Services>New Order>Stock Products>Return a Product to Stock <i>file panes:</i> Services, Current Services | <i>file panes:</i> Services, Current Services | |
| Purchases for Stock | <i>menu:</i> Inventory>New Stock Order | <i>menu:</i> Inventory>Stock Orders | |