



User Guide

User Guide

The following pages are provided as a User Guide and are best read in the order listed. Once you have read through these pages, you should find Sycle easy to navigate and use.

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Sycle Overview (1) – Introduction

Sycle is designed to grow your business, not just watch it.

Sycle is a marketing and patient management system designed and built to increase lead generation, patient retention and overall practice productivity.

Marketing

The right message to the right person at the right time.

Sycle is an online, real-time, multi-location appointment scheduling and one-to-one marketing system. Sycle is totally unique—a Customer Relationship Management (CRM) marketing tool that combines the power of the Internet and database management with traditional, personalized, automatic event triggered direct mail. It systematically maintains your customer relationships for you, leaving you free to conduct business as usual.

In short, this means that every encounter you have with a patient triggers some sort of marketing event – usually a piece of personalized direct mail. Here are a few examples:

A hearing aid is purchased = a thank you letter is sent the next day, a clean and check card is sent bi-annually and a birthday card is sent a week before your patient's birthday. All you have to do is schedule your appointments and update your patient records.

A hearing loss is identified, but no hearing aid is purchased = this person will be included in a regular "Tested Not Sold" series of mailings, thus maintaining contact with a prospect who is likely to make a purchase in the next six to twelve months.

Patient Retention: The magic of Sycle is that while you manage your practice and care for patients on a daily basis, Sycle goes about maintaining your customer relationships for you. Each direct mail item is personalized, merged and mailed on your letterhead. Sycle provides the letters, or you can replace or add your own. Your current customers are your most valuable assets. In fact, **it costs six times less to maintain a current customer than to acquire a new one.** The hearing industry has been flat for some time, making customer retention more crucial than ever.

In addition to maintaining your current patient relationships, Cycle helps you organize and mail your prospect database, your monaural patients, your three-year plus patients, etc., all with the click of a mouse. No mailing house, no printing, no hassles. Or, if you prefer to create and mail your own messages, you can export your database in a flash and use your own mail house. Cycle makes it easy, whichever way you choose.

Patient Management

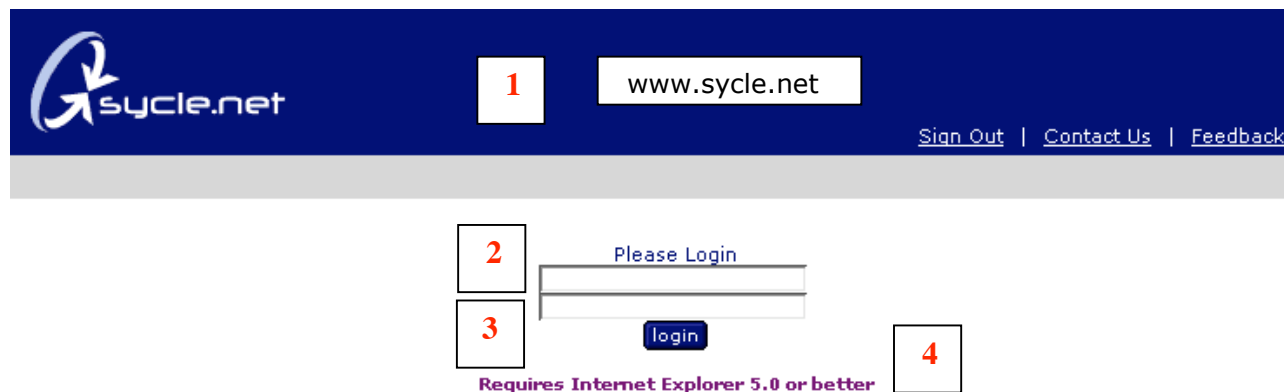
Cycle has robust patient management and reporting features. It allows you to securely maintain and manage one clinic or one hundred from anywhere at any time.

Cycle effortlessly maintains your patient records. As you make and complete each appointment, Cycle keeps track of every interaction: for every hearing aid purchased, the price, make and model are noted; every piece of direct mail a patient receives and every single appointment a patient has are recorded; associated notes are systematically included. Further, all of this information is simple to maintain and easy to access, since it is directly attached to each patient's record.

Reporting

Real-time reporting on key aspects of your business makes sure you stay on top. Management reports include: Revenue, Units Sold, Close Rate, Average Sale Price, Binaural Rate, Return Rate, Product Mix and Technology Level. These reports are automatically generated and always available in the "Reports" area. The instant nature of these reports allows you to make proactive decisions about where your business is going, instead of just reacting to where your business has been

Cycle Overview (2) – Log in



1. **LOGIN PAGE:** To use Cycle, you need to login at the start of each day. To do this, go to <http://www.cycle.net> and login. You can sign out at any time. You can also make Cycle your default landing page by selecting the following in your browser: Under “Tools”, select “Internet Options”; under the “General” tab’s home page option, type in <http://www.cycle.net>. Click on “Apply” then “OK” and Cycle.net will automatically load as your start page when you open your browser.
2. **USER NAME:** Each User, whether a Provider, Receptionist, Office Administrator or Owner, will have a unique User Name and Password. Each User’s security level will determine which pages and features they can access. Users can be added and subtracted from a clinic in seconds on the administration page.
3. **PASSWORD:** Users can select their own password, and passwords can be easily changed on the administration page.
4. **INTERNET EXPLORER 5.0:** Cycle has been optimized for Explorer 5.0 or greater. Some functions and features will not work with other browsers. If you don’t have Internet Explorer 5.0, you can download it for free by going to: <http://www.microsoft.com/windows/ie/downloads/ie6/default.asp>



5. **SECURITY LEVELS:** There are five staff types to choose from: **Owner, Office Manager, Provider, Reception** and **Telemarketer**. **Note: Only staff members designated as Provider will appear on the schedule.** You can create security levels by selecting privileges for each staff member. For example, an Owner has all privileges checked which allows the Owner to create and delete all other Users, and their passwords their access privileges.

Cycle Overview (3) – Global Site Navigation

The screenshot displays the Cycle.net website interface. At the top left is the Cycle.net logo. A navigation bar contains links for 'appointments' (labeled with a red box '1'), 'reports' (labeled with a red box '2'), 'marketing', and 'administration'. On the right, there are links for 'Help', 'Sign Out', 'Contact Us', and 'Feedback', along with a 'Sample' link. Below the navigation bar is a 'PATIENT SEARCH' section with an input field for 'enter patient' and a '/GO/' button.

The main content area is dated 'January 14, 2003'. It features a search section with filters for 'show clinic' (Oak Ridge), 'show provider' (All Providers), 'find appointment type' (--Select One--), and 'length' (0 min). A calendar shows the current week, with the 14th of January highlighted. Below the calendar are sections for 'Printable Schedule' (All Providers), a patient search form, and several summary tables:

Wednesday, January 15 call list	
Call List	Qty.
Confirmed	2
Not Confirmed	1
No Show	0
Reschedule	0
Fitting	4
Repair Pickup	3
Show all...	

Tuesday, January 14 Printable Receipts	
Purchases	Qty.
Today's Receipts	6
This Week's Receipts	7

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	31
In from Manufacturer	12
Show all/Check In or Out...	

January 14, 2003 outgoing mail items	
Mail	Qty.

The central part of the page is a detailed appointment schedule for two providers: James Mitchell and Christy Smith. The schedule lists times from 9:00 am to 6:15 pm. Appointments include 'George Godard Hearing Aid Evaluation', 'Alice Beeler', 'Beth Burrough Hearing Exam', 'John Adams', 'James Broawn Hearing Exam', 'Andrea Franklin Hearing Exam', and 'Tom Ashworth Fitting'.

1. **APPOINTMENTS:** This is the **default landing page** and the page used on a daily basis for making **appointments**, accessing your **call list**, managing **inventory**, printing **receipts**, monitoring **mail** items and conducting patient **searches**.
2. **REPORTS:** This will take you to **Management** (revenue, units sold, close rate, binaural rate, return rate and technology level), **Marketing** (total current patients, prospective patients, tested not sold, hearing aid purchase date and referral sources). and **Sales Reports** (weekly and monthly sales and receipts, inventory, hearing aid sales and open invoices).

Cycle Overview (3) – Global Site Navigation (cont.)



3. **MARKETING:** This link will take you to the marketing page, where you can review, edit and initiate all your **direct marketing**.
4. **ADMINISTRATION:** This takes you to the administration page, where you can: **create appointment types, service types, accessory types, discount types, earmold types and warranty plans**; as well as **add staff members and set clinic hours, staff hours and passwords**.
5. **PATIENT SEARCH:** Type the first few letters of a person's first or last name to create a short list of matches. If you have more than one clinic, you can use the **Global Search** feature to search for a patient in all of your clinics.
6. **LOGIN AREA:** This displays the **name** of the person currently logged in. The **sign out** link will end the session and require the next user to enter their user name and password. Please use the "**Feedback**" button to send any comments, problems or feature suggestions you have.

Cycle Overview (4) – Appointments

The screenshot displays the Cycle.net Appointments interface. At the top, there is a navigation bar with links for 'appointments', 'reports', 'marketing', and 'administration'. A search bar is labeled 'PATIENT SEARCH' with a 'GO' button. The main content area shows a calendar for January 14, 2003, and a schedule table for James Mitchell and Christy Smith. Three red boxes with numbers 1, 2, and 3 highlight the calendar, a schedule cell, and the patient search bar respectively.

1 Calendar: A calendar view for January 2003. The date January 14 is selected. A 'Week at a glance' button is visible below the calendar.

2 Schedule: A table showing appointments for James Mitchell and Christy Smith. The time slots range from 9:00 am to 12:00 pm. Appointments are listed for George Godard (Hearing Aid Evaluation) and Alice Beeler (Hearing Exam).

3 Patient Search: A search bar labeled 'enter patient' with a 'search' button and a link for 'Add a new patient'.

Appointments – Main Navigation: Items 1 through 3.

- CALENDAR:** Select the date for an appointment by clicking on it. The calendar also includes a **Week-at-a-Glance** button, which displays booked appointments and openings. You can also make an appointment directly from the week-at-a glance view.
- SCHEDULE:** Once you've chosen an appointment date from the calendar, click on the block that corresponds to the time you would like the appointment to start. This will activate the appointment making process. From the Schedule page, **you can click directly on a previously booked appointment to: confirm, cancel, change** the date and time, **identify the appointment** as a no show, **view notes**, **print an outcome form** and **update outcome notes**.
- PATIENT SEARCH:** Type the first few letters of a person's first or last name to create a short list of matches. You can also click on the "search" button to view the entire database; simply scroll down until you find your patient's name. To select your patient, click on the patient's name.

Cycle Overview (4) – Appointments (cont.)

cycle.net

Help | Sign Out | Contact Us | Feedback

appointments reports marketing administration PATIENT SEARCH

enter patient /GO/

Printable Schedule:
All Providers print...

enter patient search
Add a new patient

Wednesday, January 15 call list

Call List	Qty.
Confirmed	2
Not Confirmed	1
No Show	0
Reschedule	0
Fitting	4
Repair Pickup	3
Show all...	

Tuesday, January 14 Printable Receipts

Purchases	Qty.
Today's Receipts	6
This Week's Receipts	7

Hearing Aids

Inventory	Qty.
Out to Manufacturer	31
In from Manufacturer	12
Show all/Check In or Out...	

January 14, 2003 outgoing mail items

Mail	Qty.

11:00 am		
11:15 am		
11:30 am		
11:45 am		
12:00 pm		
12:15 pm	John Adams	Andrea Franklin
12:30 pm	James Broawn	Hearing Exam
12:45 pm	Hearing Exam	
1:00 pm		
1:15 pm		
1:30 pm		
1:45 pm		
2:00 pm		
2:15 pm		
2:30 pm		
2:45 pm		
3:00 pm		
3:15 pm		
3:30 pm		
3:45 pm		
4:00 pm		
4:15 pm		
4:30 pm		
4:45 pm		Tom Ashworth
5:00 pm		Fitting
5:15 pm		
5:30 pm		
5:45 pm		
6:00 pm		
6:15 pm		

Appointments – Main Navigation: Items 4 through 7.

- CALL LIST:** Displays the number of appointments that are: **Not Confirmed, Confirmed, No Shows, Reschedules, Fittings** and **Repair Pickups**. Clicking anywhere on the call list will display a list of all the appointments to confirm for the following day.
Note: Friday's call list will display appointments scheduled for Saturday, Sunday, and Monday.
- PURCHASES:** Allows you to view receipts for the day or for the week.
- INVENTORY:** Tracks newly ordered equipment and equipment sent for repair. Clicking on the **Show all/Check in or out...** lists the date the equipment was ordered or sent for repair, received, waiting to be delivered and date delivered.
- MAIL:** Displays the number of pieces and type of mail going out each day. By clicking on the mailbox, you will see which pieces are going to whom and have the option to deselect any and all that you wish. Mail items must be deselected by 8:00 p.m., or they will be mail merged and automatically sent that evening.

Cycle Overview (5) – Administration



show clinic:
Oak Ridge

<< Jan 2003 go >>
Sun Mon Tue Wed Thu Fri Sat
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 -16- 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31
Week at a glance Today

administration
[Appointment Types](#)
[Archive Search](#)
[Discount Types](#)
[Warranty/Service Plans](#)
[Service Types](#)
[Accessory Types](#)
[Patient Backfill](#)
[Physician Backfill](#)

clinics
Oak Ridge edit

staff
Beth Tribble edit
[Create a new staff member](#)

Scroll Up	Oak Ridge	James Mitchell	Christy Smith
7:00 am			
7:15 am			
7:30 am			
7:45 am			
8:00 am			
8:15 am			
8:30 am			
8:45 am			
9:00 am			patient appt in another clinic
9:15 am			
9:30 am			
9:45 am			
10:00 am			
10:15 am			patient appt in another clinic
10:30 am			
10:45 am		Hank Aaron	
11:00 am	staff meeting	staff meeting	staff meeting
11:15 am			
11:30 am			Outside Appt: Dr Nathan - Dentist Appt
11:45 am		Bill Blass	
12:00 pm			
12:15 pm		Willia Austin Hearing Aid Evaluation	
12:30 pm			
12:45 pm			

- CLINIC:** Each new clinic will be set up and given an owner password by Sycle. Once the initial set up is completed, you will be able to edit the **clinic's information** (address, phone number etc.) and select the clinic's **hours of operation**. These can be changed at any time. Select the clinic (if there is more than one in your group) and click on the "edit" button.
- STAFF:** The staff area allows you to **add and delete staff members**. This includes name, address, phone numbers, etc. Only staff members that are added as "**providers**" will appear on the schedule. This area allows you to **assign passwords** for all employees.
- CALENDAR:** The administration calendar lets you select days on which you would like to block out time for either a staff member or the clinic. You can also schedule patient appointments from the administration calendar.

Sycle Overview (5) – Administration (cont.)

show clinic:
Oak Ridge

<< Mar 2003 go >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Week at a glance Today

administration

- [Appointment Types](#)
- [Archive Search](#)
- [Discount Types](#)
- [Warranty/Service Plans](#)
- [Service Types](#)
- [Accessory Types](#)
- [Earmold Types](#)
- [Insurance Companies](#)
- [Patient Backfill](#)
- [Physician Backfill](#)

clinics

Oak Ridge edit

staff

Brian Anderson edit

[Create a new staff member](#)

Scroll Up	Oak Ridge	Landen Binstock	James Mitchell	Christy Smith
7:00 am				
7:15 am				
7:30 am				
7:45 am				
8:00 am			Margar Campbe Hearing Exam	
8:15 am				
8:30 am				
8:45 am				
9:00 am	Staff Meeting			
9:15 am				
9:30 am		Sean Shaff Hearing Exam		Carlot Martin Hearing Exam
9:45 am			Tilda Heron Clean n Check	
10:00 am				
10:15 am			Peter Garrit Fitting	
10:30 am		Quincy Jones Fitting		
10:45 am				
11:00 am				
11:15 am				
11:30 am				
11:45 am				
12:00 pm				
12:15 pm				
12:30 pm				
12:45 pm				
1:00 pm				
1:15 pm				

4

4. ADMINISTRATION:

APPOINTMENT TYPES: This area allows you to **create and delete appointment types**, as well as define their **length of time** and the **color** in which they will appear on the schedule.

ARCHIVE SEARCH: This allows you to search for any **past or deceased patients**. Patients are never completely deleted from the database—just archived.

DISCOUNT TYPES: This allows you to **create discount types**, assign a **percentage discount** or a set a **dollar figure**. You can create as many as you like.

WARRANTY / SERVICE PLANS: This area allows you to create any service or extended warranty plans you wish to offer, including the **time, coverage** and **cost** of the plan.

SERVICE TYPES: This area allows you to set up any services you provide and charge for.

ACCESSORY TYPES: This area allows you to include accessories, ALDS and list their prices in the clinic's inventory.

EARMOLD TYPES: The default setting is Hearing Aid Earmold, you can add new earmold types in this area.

INSURANCE COMPANIES: This area allows the user to enter insurance companies which are frequently used.

PATIENT BACKFILL: Allows the administrator to enter new patient records.

PHYSICIAN BACKFILL: Allows the administrator to record the names of physicians who have referred patients. These new entries will appear in the Referral Source when making a new appointment.

Cycle Overview (6) – Reports

Quick Report

Choose: Mar 2003

quick business report by Oak Ridge Clinic Stats /GO/

DOWNLOAD ALL

REVENUES	Mar 2003	QTD	YTD	DOWNLOAD	FULL REPORT
Oak Ridge	\$33176	\$15099	\$393672		

UNITS SOLD	Mar 2003	QTD	YTD	DOWNLOAD
Oak Ridge	13	38	220	

UNITS RETURNED	Mar 2003	QTD	YTD	DOWNLOAD
Oak Ridge	0	27	59	

(Partial view – All quick reports are on this page)

- QUICK BUSINESS REPORT:** The quick business report provides a **snapshot** of the practice. It includes **benchmarks** for many of the categories based on industry averages. There are **seven reports: Revenues, Units Sold, Units Returned Net Units Sold, Close Rate, Average Sale Price, Binaural Rate, Return Rate, and Product Mix.**
- CLINIC PULLDOWN:** If you have more than one clinic, you can use this pulldown menu to select an **individual clinic** or **“all clinics”**. This allows you to do a clinic-by-clinic comparison. Clinics are displayed with a blue background.
- PROVIDER PULLDOWN:** You can choose an **individual provider** by selecting their name, or you can select **“all providers”**. This allows you to compare providers. Providers are displayed with a white background.
- FULL REPORT:** By clicking on the **“Full Report”** button you will see a more detailed version of the selected Quick Business Report. **There is a Full Report for seven of the individual Quick Business Reports.** Again, using the pulldown menus **you can select individual clinics or “all clinics”** if you have more than one. **You can also select “clinic stats” or “all providers”, as well as very specific date ranges** (for example, from the 15th of one month to the 5th of another).

Cycle Overview (6) – Reports (cont.)

Revenue Report - Product

Start: Jan 01 2003
End: Feb 31 2003

revenue report by: Oak Ridge | Total Sales | Clinic Stats

Hearing Aids

Manufacturer	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$191689	\$10070	\$363247	\$131443	\$7780

Batteries

Manufacturer	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$531	\$32	\$641	\$68	\$0

QUICK BUSINESS REPORT (Cont.) FULL REPORT:

5. **FULL REPORT:** Above is a **Full Report for the Revenues section** of the **Quick Business Report**. The Full Report has the **date range pulldown** allowing you to select specific date ranges by **day, month** and **year**. (Note: the Quick Business Report allows you to choose date ranges by month and year only).

	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$59230	\$83957	\$305691	\$221734	\$7780

6. **DOWNLOAD** or **DOWNLOAD ALL:** Allows you to download all or specific report information directly into an **Excel Document** onto your desktop.

Cycle Overview (6) – Reports (cont.)

cycle.net
 Help | Sign Out | Contact Us | Feedback
 appointments | reports | marketing | administration
 quick business | weekly sales | sales | total sales | open invoices | inventory | referrals | marketing
 PATIENT SEARCH
 enter patient /GO/

Weekly Sales Report

Weekly Sales report for Week of: /GO/

Weekly Sales								
Sales	Sun Jan 26th	Mon Jan 27th	Tue Jan 28th	Wed Jan 29th	Thu Jan 30th	Fri Jan 31st	Sat Feb 1st	Total
Hearing Aid	0 \$0.00	0 \$0.00	2 \$5000.00	3 \$6640.00	2 \$3900.00	5 \$10280.00	0 \$0.00	12 \$25820.00
Hearing Test	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	2 \$140.00	0 \$0.00	0 \$0.00	2 \$140.00
Battery	0 \$0.00	0 \$0.00	0 \$0.00	1 \$6.00	2 \$40.00	0 \$0.00	0 \$0.00	3 \$46.00
ALD	0 \$0.00	0 \$0.00	0 \$0.00	1 \$600.00	0 \$0.00	0 \$0.00	0 \$0.00	1 \$600.00
Warranty	0 \$0.00	0 \$0.00	0 \$0.00	2 \$600.00	1 \$5.00	1 \$500.00	0 \$0.00	4 \$1105.00
Service	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00
Repair	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00
Sub Total	0 \$0.00	0 \$0.00	2 \$5000.00	7 \$7846.00	7 \$4085.00	6 \$10780.00	0 \$0.00	22 \$27711.00
Returns	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(2) (\$4240.00)	(0) (\$0.00)	(2) (\$4240.00)
Total	0 \$0.00	0 \$0.00	2 \$5000.00	7 \$7846.00	7 \$4085.00	4 \$6540.00	0 \$0.00	20 \$23471.00

(Partial view – All weekly reports follow below)

7. **WEEKLY SALES REPORT:** There are 4 categories within the Weekly Sales Report: **Weekly Sales, Weekly Receipts, Weekly Appointments** and **Weekly Referrals**. The Weekly Sales Report allows the user to view a breakdown of weekly sales including repairs and returns. Using the pulldown you can **select the specific week** you would like to review. Following are Weekly Receipts, Appointments and Referrals, each provides a detailed account of the week's activities.

Weekly Receipts								
Receipts	Sun Jan 26th	Mon Jan 27th	Tue Jan 28th	Wed Jan 29th	Thu Jan 30th	Fri Jan 31st	Sat Feb 1st	Total
cash	\$0.00	\$0.00	\$0.00	\$1000.00	\$0.00	\$7380.00	\$0.00	\$8380.00
visa	\$0.00	\$0.00	\$1500.00	\$5640.00	\$500.00	\$0.00	\$0.00	\$7640.00
check	\$0.00	\$0.00	\$1290.96	\$0.00	\$800.00	\$0.00	\$0.00	\$2090.96
mc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
discover	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
amex	\$0.00	\$0.00	\$2000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2000.00
other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$4790.96	\$6640.00	\$1300.00	\$7380.00	\$0.00	\$20110.96
H/A Deposit	\$0.00	\$0.00	\$1500.00	\$13280.00	\$800.00	\$10760.00	\$0.00	\$26340.00

Sycle Overview (6) – Reports (cont.)

WEEKLY SALES REPORT (Cont.):

Weekly Appointments								
Appointments	Sun Jun 22nd	Mon Jun 23rd	Tue Jun 24th	Wed Jun 25th	Thu Jun 26th	Fri Jun 27th	Sat Jun 28th	Total %
Speech Therapy	0	0	0	0	1	0	0	1 5%
Sign Language	0	0	0	0	0	0	0	0 0%
Service	0	0	0	0	0	0	0	0 0%
Repair	0	0	0	0	0	0	0	0 0%
On site Hearing Exam	0	0	0	0	0	0	0	0 0%
Hearing Exam	0	0	0	0	2	3	3	8 42%
Hearing Aid Evaluation	0	0	0	1	0	3	1	5 26%
HAO	0	0	0	0	0	0	0	0 0%
Fitting	0	0	0	0	0	1	1	2 11%
Clean n Check	0	0	0	0	0	2	1	3 16%
Totals	0	0	0	1	3	9	6	19 100%

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DOWNLOAD

Weekly Referral								
Referral	Sun Jan 26th	Mon Jan 27th	Tue Jan 28th	Wed Jan 29th	Thu Jan 30th	Fri Jan 31st	Sat Feb 1st	Total
Yellow pages	0	0	2	0	0	1	0	3
Walk-in	0	1	0	0	0	3	1	5
Unknown	0	0	0	0	0	0	0	0
TV	0	0	0	0	0	0	0	0
Telemarketing	0	0	0	0	0	0	0	0
Returning Patient	0	1	0	1	8	2	0	12
Radio	0	0	0	0	0	0	0	0
Previous Patient	0	0	0	0	0	0	0	0
Patient Referral	0	0	0	0	2	0	1	3
Open House	0	0	0	0	0	1	0	1
Online	0	0	0	0	0	0	0	0
Newspaper	0	0	0	1	2	1	0	4
Medical Referral	1	1	0	0	4	1	0	7
HMO/Insurance	0	0	0	0	0	0	1	1
Follow-up Appointment	0	0	0	0	0	0	0	0
Direct Mailing	0	0	0	1	1	3	1	6
Total	1	3	2	3	17	12	4	42

8

DOWNLOAD

weekly_sales.xls								
	A	B	C	D	E	F	G	H
	Receipts	Sun Mar 9th	Mon Mar 10th	Tue Mar 11th	Wed Mar 12th	Thu Mar 13th	Fri Mar 14th	Sat Mar 15th
2	cash	\$0.00	\$0.00	\$6610.80	\$2000.00	\$100.00	\$0.00	\$32.00
3	visa	\$0.00	\$0.00	\$0.00	\$0.00	\$98.00	\$0.00	\$0.00
4	check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$285.00
5	mc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	discover	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	amex	\$0.00	\$0.00	\$0.00	\$9500.00	\$3000.00	\$0.00	\$0.00
8	other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	Total	\$0.00	\$0.00	\$6610.80	\$11500.00	\$3198.00	\$0.00	\$317.00
11	H/A Deposit	\$0.00	\$0.00	\$0.00	\$2000.00	\$100.00	\$0.00	\$0.00

8. **DOWNLOAD or DOWNLOAD ALL:** Allows you to download all or specific report information directly into an **Excel Document** onto your desktop. For this example we downloaded the Weekly Receipts report.

Cycle Overview (6) – Reports (cont.)

9

Monthly Sales Report

Choose: Jan 2003

Monthly Sales report for Oak Ridge Clinic Stats

10

10

Sales	Week 1 Jan 1-7	Week 2 Jan 8-14	Week 3 Jan 15-21	Week 4 Jan 22-28	Week 5 Jan 29-31	Total
Hearing Aid	12 \$31520.00	15 \$30500.00	7 \$15500.00	7 \$20560.00	10 \$20820.00	51 \$118900.00
Earmold	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00
Hearing Test	0 \$0.00	1 \$70.00	1 \$70.00	2 \$140.00	2 \$140.00	6 \$420.00
Battery	9 \$154.00	3 \$0.00	2 \$22.00	1 \$10.00	3 \$46.00	18 \$232.00
ALD	1 \$0.75	0 \$0.00	5 \$1425.00	1 \$75.00	1 \$600.00	8 \$2100.75
Warranty	0 \$0.00	0 \$0.00	1 \$500.00	0 \$0.00	4 \$1105.00	5 \$1605.00
Service	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00	0 \$0.00
Repair	1 \$0.00	0 \$0.00	0 \$0.00	6 \$640.00	0 \$0.00	7 \$640.00
Sub Total	23 \$31674.75	19 \$30570.00	16 \$17517.00	17 \$21425.00	20 \$22711.00	95 \$123897.75
Returns	(0) (\$0.00)	(1) (\$2025.00)	(0) (\$0.00)	(1) (\$3500.00)	(2) (\$4240.00)	(4) (\$9765.00)
Total	23 \$31674.75	18 \$28545.00	16 \$17517.00	16 \$17925.00	18 \$18471.00	91 \$114132.75

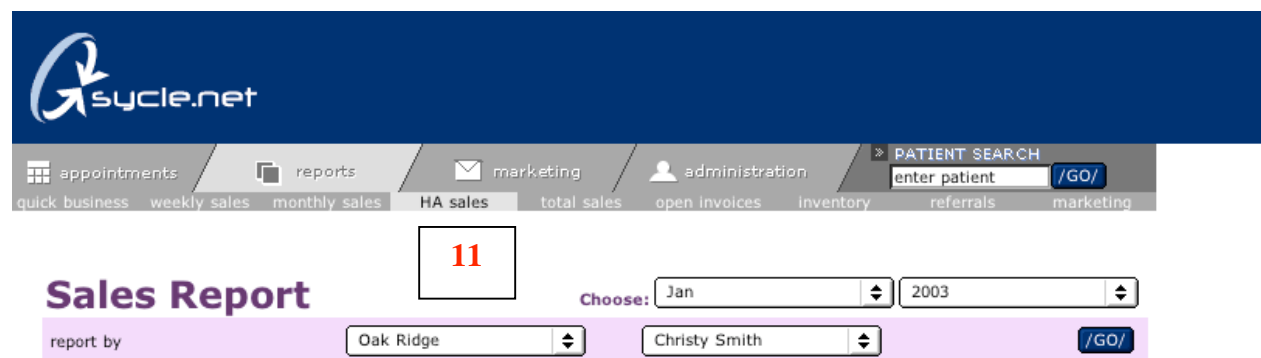
(Partial view)

9. **MONTHLY SALES REPORT:** Like the Weekly Sales Report, there are 4 categories within the Monthly Sales Report: **the Monthly Sales, Monthly Receipts, Monthly Appointments** and **Monthly Referrals**. The Monthly Sales Report allows the user to view a particular month's sales including repairs and returns. Using the pulldowns you can **select the specific month** you would like to review. **You can also select an individual clinic or all clinics or an individual provider or clinic stats.**

	A	B	C	D	E	F	G
		Week 1: Jan 1-7	Week 2: Jan 8-14	Week 3: Jan 15-21	Week 4: Jan 22-28	Week 5: Jan 29-31	Total
1	Receipts						
2	cash	\$5260.00	\$2200.00	\$1900.00	\$18984.00	\$8380.00	\$36724.00
3	visa	\$5628.00	\$0.00	\$2000.00	\$10170.00	\$6140.00	\$23938.00
4	check	\$3700.00	\$1000.00	\$3500.00	\$1840.96	\$800.00	\$10840.96
5	mc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	discover	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	amex	\$0.00	\$1235.00	\$200.00	\$2000.00	\$0.00	\$3435.00
8	other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	belton	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	Total	\$14588.00	\$4435.00	\$7600.00	\$32984.96	\$15320.00	\$74937.96
12	HA Deposits	\$0.00	\$4435.00	\$4400.00	\$18720.00	\$13720.00	\$41275.00

10. **DOWNLOAD or DOWNLOAD ALL:** Allows you to download all or specific report information directly into an **Excel Document** onto your desktop.

Cycle Overview (6) – Reports (cont.)



11

Sales Report

Choose: Jan 2003

report by: Oak Ridge Christy Smith /GO/

Oak Ridge | Christy Smith

DOWNLOAD

12

Sale Date	Provider Name	Patient's Name	Office	Units	Manufacturer	Model	Type
2003-01-10	Christy Smith	chris crusty	Oak Ridge	2	Starkey	Series 9	ITC
2003-01-14	Christy Smith	Alice Beeler	Oak Ridge	2	Beltone	Invisa - Polara	CIC
2003-01-14	Christy Smith	Beth Burroughs	Oak Ridge	2	Beltone	D71HP- Polara	BTE
2003-01-15	Christy Smith	Archibald Arsolon	Oak Ridge	1	AVR Sonovation	ImpaCt	ITE
2003-01-16	Christy Smith	Ned Divine	Oak Ridge	1	Beltone	Invisa - Polara	CIC
2003-01-16	Christy Smith	Janet DeLuca	Oak Ridge	1	Beltone	Invisa - Oria	CIC
2003-01-24	Christy Smith	Janet DeLuca	Oak Ridge	1	Beltone	Opera - Lumina	ITC
2003-01-28	Christy Smith	John Adams	Happy Valley	1	Sonic Innovations	Altair	ITC
2003-01-29	Christy Smith	Harry Belafonte	Oak Ridge	2	Beltone	Invisa - Oria	CIC
2003-01-30	Christy Smith	Janet Jones	Oak Ridge	1	Beltone	Opera - Lumina	ITC
2003-01-31	Christy Smith	Tony Roma	Oak Ridge	1	Brooketone	BRH8	HS
Totals:				15			
Returns							
Sale Date	Provider Name	Patient's Name	Office	Units	Manufacturer	Model	Type
2003-01-14	Christy Smith	Alice Beeler	Oak Ridge	1	Beltone	Invisa - Polara	CIC
2003-01-16	Christy Smith	Janet DeLuca	Oak Ridge	1	Beltone	Invisa - Oria	CIC
2003-01-31	Christy Smith	Tony Roma	Oak Ridge	1	Brooketone	BRH8	HS
Totals:				3			

(Partial view, Right-hand side Hearing Aid Sales Report)

11. **HA SALES REPORT:** The Hearing Aid Sales Report provides the user with detailed sales information. The sales information can be organized according to any of the following categories: **Sales Date, Provider Name, Clinic (Office), Manufacturer, Model, Type, Technology or Gross Price**. You can specify the month and year using the pull-downs and you have the option to view an **individual clinic** or **“all clinics”** and an **individual provider** or **all providers**. (The above Sales Report accounts sales for January 2003 for the provider: Christy Smith at the Oak Ridge Clinic). Returns are organized below Hearing Aid Sales using the same categories.

Sycle Overview (6) – Reports (cont.)

HA SALES REPORT (Cont)

Tech	Cost	Gross Price	Discount	Net Price	Initial Payment	Insurance Estimate	Insurance Payment	Balance Paid	Balance Due	Last Date Paid
Conventional	\$4,000.00	\$4,400.00	\$0.00	\$4,400.00	\$0.00	\$0.00	\$0.00	\$4,400.00	\$0.00	2003-01-04
Digital	\$2,000.00	\$4,050.00	\$0.00	\$4,050.00	\$500.00	\$0.00	\$0.00	\$3,500.00	\$550.00	2003-01-28
Digital	\$4,000.00	\$4,050.00	\$0.00	\$4,050.00	\$500.00	\$0.00	\$0.00	\$500.00	\$3,550.00	2003-01-14
Programmable	\$2,000.00	\$3,000.00	\$600.00	\$2,400.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,400.00	
Digital	\$2,000.00	\$3,000.00	\$600.00	\$2,400.00	\$500.00	\$0.00	\$0.00	\$2,400.00	\$0.00	2003-01-24
Digital	\$2,000.00	\$3,500.00	\$0.00	\$3,500.00	\$0.00	\$0.00	\$0.00	\$7,000.00	\$-3,500.00	2003-01-24
Digital	\$155.00	\$4,200.00	\$840.00	\$3,360.00	\$250.00	\$0.00	\$0.00	\$250.00	\$3,110.00	2003-01-24
Digital	\$450.00	\$2,000.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$2,000.00	\$0.00	2003-03-12
Digital	\$1,000.00	\$6,800.00	\$1,360.00	\$5,440.00	\$1,000.00	\$0.00	\$0.00	\$6,640.00	\$-1,200.00	2003-01-29
Digital	\$0.00	\$2,000.00	\$50.00	\$1,950.00	\$800.00	\$0.00	\$0.00	\$800.00	\$1,150.00	2003-01-30
Analog	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$1,000.00	2003-01-31
Totals:	\$17,605.00	\$39,000.00	\$3,450.00	\$35,550.00	\$4,550.00	\$0.00	\$0.00	\$28,490.00	\$7,060.00	-
Tech	Cost	Gross Price	Discount	Net Price	Initial Payment	Insurance Estimate	Insurance Payment	Balance Paid	Balance Due	Return Date
Digital	\$0.00	\$2,025.00	\$0.00	\$2,025.00	\$500.00	\$0.00	\$0.00	(\$3,500.00)	-	2003-01-14
Digital	\$2,000.00	\$3,500.00	\$0.00	\$3,500.00	\$0.00	\$0.00	\$0.00	(\$7,000.00)	-	2003-01-24
Analog	\$0.00	\$2,000.00	\$0.00	\$2,000.00	\$1,000.00	\$0.00	\$0.00	(\$1,000.00)	-	2003-01-31
Totals:	\$2,000.00	\$7,525.00	\$0.00	\$7,525.00	\$1,500.00	\$0.00	\$0.00	(\$11,500.00)	-	-

(Left-hand side of Hearing Aid Sales Report)

HA SALES REPORT (Cont): The Hearing Aid Sales Report also shows any **Discount** given to the patient, the **Net Payment**, **Cost**, **Deposit**, **Insurance Payment**, **Balance Due** and **Date of Last Payment**. Returns are also categorized in the same way.

Tech	Gross Price	Discount	Net Price	Initial Payment	Insurance Payment	Balance Paid	Balance Due	Last Date Paid
Programmable(L) Digital (R)	\$4000.00	\$1600.00	\$2400.00	\$200.00	\$100.00	\$500.00	\$1900.00	2003-03-02
Digital	\$2000.00	\$0.00	\$2000.00				\$2000.00	
Programmable(L) Digital (R)	\$4000.00	\$1600.00	\$2400.00				\$2400.00	
Digital	\$5400.00	\$0.00	\$5400.00	\$2000.00		\$5400.00	\$0.00	2003-03-06
Digital	\$8000.00	\$0.00	\$8000.00	\$8000.00		\$8000.00	\$0.00	2003-03-06
Conventional	\$3000.00	\$0.00	\$3000.00	\$3000.00		\$6000.00	-\$3000.00	2003-03-13
Analog	\$2000.00	\$0.00	\$2000.00	\$2000.00		\$2000.00	\$0.00	2003-03-12
Digital	\$2000.00	\$0.00	\$2000.00	\$100.00		\$100.00	\$1900.00	2003-03-13
Totals:	\$30400.00	\$3200.00	\$27200.00	\$15300.00	\$200.00	\$22000.00	\$5200.00	

12. DOWNLOAD: Allows you to **download the entire HA Sales Report directly into an Excel Document** onto your desktop. The above shows a partial view of the HA Sales Report as it is downloaded into an Excel Document.

Cycle Overview (6) – Reports (cont.)

14

Oak Ridge | Christy Smith

[DOWNLOAD](#)

Total Sales										
<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient's Name</u>	<u>Office</u>	<u>Type</u>	<u>Description</u>	<u>Notes</u>	<u>Gross Price</u>	<u>Discount</u>	<u>Net Price</u>	<u>Insurance Estimate</u>
06/05/2003	Christy Smith	John Adamson	Oak Ridge	Repair	S/N: 32	danavox - Door is broken	\$0.00	\$0.00	\$90.00	\$0.00
06/27/2003	Christy Smith	Jane Seymore	Oak Ridge	Right Hearing Aid	Beltone Optima - Lumina ITE Digital		\$2200.00	\$200.00	\$2000.00	\$0.00
06/27/2003	Christy Smith	Quebec Francois	Oak Ridge	Left Hearing Aid	Beltone Invisa CSP-II CIC Conventional		\$3000.00	\$0.00	\$3000.00	\$0.00
TOTAL:							\$5200.00	\$200.00	\$5090.00	\$0.00

Total Returns										
<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient's Name</u>	<u>Office</u>	<u>Type</u>	<u>Description</u>	<u>Notes</u>	<u>Gross Price</u>	<u>Discount</u>	<u>Net Price</u>	<u>Insurance Estimate</u>
06/27/2003	Christy Smith	Qatar Izfar	Oak Ridge	Left Hearing Aid	Dahlberg JS ITC Analog		\$2000.00	\$0.00	\$2000.00	\$0.00
06/27/2003	Christy Smith	Qatar Izfar	Oak Ridge	Left Hearing Aid	Bernaфон Calibri C2 BTE BTE Conventional		\$3000.00	\$0.00	\$3000.00	\$0.00
06/27/2003	Christy Smith	Quebec Francois	Oak Ridge	Left Hearing Aid	Beltone Supremo BTE Conventional		\$2000.00	\$0.00	\$2000.00	\$0.00
TOTAL:							\$7000.00	\$0.00	\$7000.00	\$0.00

- TOTAL SALES REPORT:** Allows the user to see all sales made – including **hearing aids, warranties and service plans, repairs, batteries and accessories**. You can specify the month using the pulldowns and you have the option to view **an individual clinic or “all clinics” and an individual provider or all providers**. You can also click on the underlined column headings in blue: **Sale Date**, **ProviderName**, **Patient’s Name**, **Office**, **Type** or **Gross Price** to sort information contained in the Total Sales Report.
- DOWNLOAD:** Allows you to download the **Total Sales Report directly into an Excel Document onto your desktop**.

Cycle Overview (6) – Reports (cont.)

15

Open Invoice Report

Parent Company: Test Company

- Clinics:
- Oak Ridge
 - Shady Oakes
 - Happy Valley
 - Maple View

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[View Report](#)
[Download](#)

Total Balance Due: \$ 194423.7

Open Invoices							
Clinic	First	Last	Purchase Date	Net Price		Amt Paid	Balance Due
Oak Ridge	Billy	Jean	02/05/2002	\$1200.00	a	\$0.00	\$1200.00
Oak Ridge	Tiny	Tim	03/26/2002	\$1200.00		\$0.00	\$1200.00
Oak Ridge	Archibald	Arsolen	03/28/2002	\$2800.00		\$0.00	\$2800.00
Oak Ridge	Patty	Tornero	04/11/2002	\$1500.00		\$0.00	\$1500.00
Oak Ridge	Hank	Aaron	04/11/2002	\$50.00		\$0.00	\$50.00
Oak Ridge	George	Bush	04/23/2002	\$1270.00		\$0.00	\$1270.00
Oak Ridge	George	Bush	07/26/2002	\$4122.00		\$0.00	\$4122.00
Oak Ridge	George	Bush	07/31/2002	\$7075.00		\$0.00	\$7075.00
Oak Ridge	Beth	Burroughs	08/01/2002	\$28.00		\$0.00	\$28.00
Oak Ridge	Archibald	Arsolen	08/02/2002	\$56.00		\$0.00	\$56.00
Oak Ridge	Archibald	Arsolen	08/08/2002	\$23.00		\$0.00	\$23.00

(Partial view – end of report shown below)

Oak Ridge	Compay	Segundo	07/11/2003	\$3200.00		\$1000.00	\$600.00
Oak Ridge	Frank	Burns	07/12/2003	\$300.00		\$0.00	\$300.00
Oak Ridge	Ned	Divine	07/17/2003	\$1890.00		\$1000.00	\$890.00
Oak Ridge	Joyce	Caroll	07/17/2003	\$4534.98		\$500.00	\$4034.98
Total				\$279914.94		\$53266.00	\$194423.70

15. **OPEN INVOICE REPORT:** The Open Invoice Report provides the user with a list of all Open Invoices: the **Patient's first and last name**, the **Purchase Date**, the **Net Price**, **Amount Paid** and **Balance Due**. Clicking on the amount underlined in blue in the **Net Price column (a)** will load the corresponding Receipt window. (See below)

a.

Receipt

Patient: [Billy Jean](#)
 123 Neverland , Culver City CA 97654
 (415) 555-1515

Oak Ridge
 Oak Ridge 435 Second Ave., Oak Ridge OH
 45631
 (740) 446-7619
 Provider: **Christy Smith**
 Date: **2002-02-05**
 Tracking #:

a

Quantity	Item	Description	Cost	Amount
1	Left Hearing Aid	Phonak Classica BTE Conventional	\$1001.00	\$1200.00
Total				\$1200.00
Sales Tax				\$0.00
Grand Total				\$1200.00
Amount Due				\$1200.00

[payment](#) [fee](#)
[delete](#)
[add](#) [edit](#) [print](#) [close](#)

other receipts for this patient

Date	Total	Amount Due
11/15/2002	\$960.00	\$0.00
09/17/2002	\$960.00	\$960.00
08/22/2002	\$1180.00	\$1180.00

Sycle Overview (6) – Reports (cont.)

OPEN INVOICE REPORT (Cont)



Open Invoice Report

Parent Company: Test Company

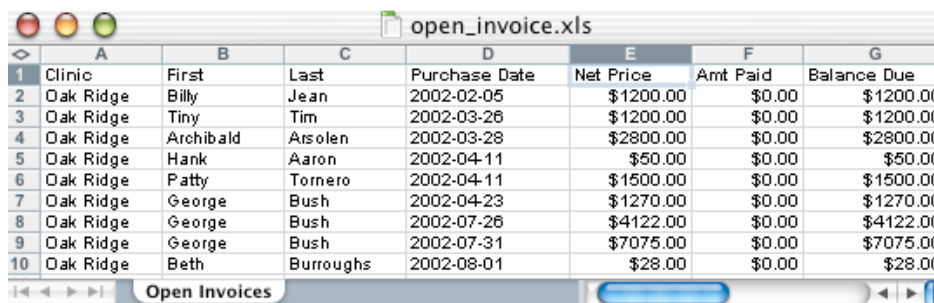
- Clinics:
- Oak Ridge
 - Shady Oakes
 - Happy Valley
 - Maple View

16

[View Report](#)
[Download](#)

Total Balance Due: \$ 194423.7

Open Invoices						
Clinic	First	Last	Purchase Date	Net Price	Amt Paid	Balance Due
Oak Ridge	Billy	Jean	02/05/2002	\$1200.00	\$0.00	\$1200.00
Oak Ridge	Tiny	Tim	03/26/2002	\$1200.00	\$0.00	\$1200.00
Oak Ridge	Archibald	Arsolen	03/28/2002	\$2800.00	\$0.00	\$2800.00
Oak Ridge	Patty	Tornero	04/11/2002	\$1500.00	\$0.00	\$1500.00
Oak Ridge	Hank	Aaron	04/11/2002	\$50.00	\$0.00	\$50.00
Oak Ridge	George	Bush	04/23/2002	\$1270.00	\$0.00	\$1270.00
Oak Ridge	George	Bush	07/26/2002	\$4122.00	\$0.00	\$4122.00
Oak Ridge	George	Bush	07/31/2002	\$7075.00	\$0.00	\$7075.00
Oak Ridge	Beth	Burroughs	08/01/2002	\$28.00	\$0.00	\$28.00
Oak Ridge	Archibald	Arsolen	08/02/2002	\$56.00	\$0.00	\$56.00
Oak Ridge	Archibald	Arsolen	08/08/2002	\$23.00	\$0.00	\$23.00



- 16. **DOWNLOAD:** Allows you to download the **Open Invoice Report** directly into an **Excel Document** to your desktop

17.

Cycle Overview (6) – Reports (cont.)

Inventory Report

Choose: June 2003

report by

Oak Ridge

All Providers

/GO/

Hearing aids and earmolds checked in from the manufacturer but not yet delivered

Oak Ridge

18

DOWNLOAD

Hearing Aid and Earmold Purchases

<u>Sale Date</u>	<u>Arrival Date</u>	<u>BTE Earmold In</u>	<u>Provider</u>	<u>Patient</u>	<u>Office</u>	<u>Equipment</u>	<u>Ear S/N</u>	<u>Description</u>	<u>Purchase Price</u>
06/28/2003	06/28/2003	N/A	Landon Binstock	Friendly Kitty	Oak Ridge	Belton Opera Plus CSPII-P ITC Programmable	R		\$2000.00
06/28/2003	06/28/2003	Y	Landon Binstock	Quincy Jones	Oak Ridge	Belton D71HP- Polara BTE Digital	L	21354	\$2000.00
06/28/2003		N	Landon Binstock	Quincy Jones	Oak Ridge	Belton D71HP- Lumina BTE Digital	R		\$2000.00
06/28/2003	06/28/2003	N/A	James Mitchell	Alice Beeler	Oak Ridge	Hearing Aid Earmold	L		\$2000.00
06/28/2003		N/A	James Mitchell	Alice Beeler	Oak Ridge	Hearing Aid Earmold	L		\$2000.00
06/28/2003	06/28/2003	Y	Landon Binstock	Nadine Hill	Oak Ridge	Siemens Music Digital BTE Digital	R	2226	\$1700.00
06/30/2003		N	James Mitchell	Quincy Adams	Oak Ridge	Magnatone Inegra BTE Programmable	L		\$1000.00
TOTAL:									\$8820.00

Hearing Aid Repairs

<u>Sale Date</u>	<u>Arrival Date</u>	<u>BTE Earmold In</u>	<u>Provider</u>	<u>Patient</u>	<u>Office</u>	<u>Equipment</u>	<u>Ear S/N</u>	<u>Description</u>	<u>Purchase Price</u>
06/04/2003		N/A	Landon Binstock	Margaret Campbell	Oak Ridge		R	door broken	\$0.00
06/05/2003	06/05/2003	N/A	Landon Binstock	John Adamson	Oak Ridge	Micro-Tech DX-3 CIC Digital	R	343434 Intermittent	\$0.00

18. **INVENTORY REPORT:** Creates a detailed account of all hearing aids that have been checked in from the manufacturer but have not yet been delivered to the patient. Both Hearing Aid Purchases and Hearing Aid Repairs are listed. Like the other reports, using the pulldowns, you can view an individual clinic or “all clinics” and an individual provider or all providers. You can also **sort inventory information** by clicking column headings underlined in blue: **Sale Date**, **Arrival Date**, **Provider**, **Patient**, **Office** or **Purchase Price**.

Sale Date	Arrival Date	Provider	Patient	Office	Equipment	Ear S/N	Description	Discount Price
2003-05-08	2003-05-08	Landon Binstock	Harry Belafonte	Oak Ridge	Beltone Invisa - Silica CIC Digital	L 65465		\$1600.00
2003-05-13	2003-05-13	Landon Binstock	Willie Mays	Oak Ridge	Futuretone FTC8 ITC Analog	L 12345667778		\$800.00
2003-05-13	2003-05-13	Lea Koch	Ken Dryden	Oak Ridge	Beltone Invisa DHI CIC Conventional	L 452		\$1600.00
2003-05-27	2003-05-27	Lea Koch	Spyder Mann	Oak Ridge	Beltone Supremo BTE Conventional	R 2452		\$1600.00
2003-05-27	2003-05-27	Landon Binstock	Farrah Fawcett	Oak Ridge	Beltone Invisa - Dria CIC Digital	L 8798876898		\$7600.00
2003-05-29	2003-05-29	Landon Binstock	Dennis Franz	Oak Ridge	Beltone Invisa - Polara CIC Digital	L 2345		\$1600.00
TOTAL:								\$14800.00

19. **DOWNLOAD:** Allows you to download the Inventory Report directly into an Excel Document onto your desktop.

Sycle Overview (6) – Reports (cont.)

Referral Report

Referral Report For:

Referral Report for Oak Ridge

Referral Source	Count	Sales Ops	Sales Ops with Test	TNS	No Loss	Units Sold	Purchase Ratio
Current Patient	0	0	0	0	0	0	0%
Direct Mailing	6	5	3	0	0	2	70%
Insurance / Third	0	0	0	0	0	0	0%
Medical Referral	9	7	4	2	0	3	21%
Newspaper	10	7	3	2	0	4	29%
Online	0	0	0	0	0	0	0%
Open House	0	0	0	0	0	0	0%
Open House / Telemarketing	0	0	0	0	0	0	0%
Patient Referral	4	4	2	0	0	5	63%
Radio	6	6	4	0	0	17	142%
TV	4	4	2	1	0	2	25%
Telemarketing	1	1	1	0	0	2	100%
Walk-in	2	2	0	0	0	1	25%
Yellow pages	4	4	3	1	0	3	38%
Total	46	40	22	6	0	44	55%

20. **REFERRAL REPORT:** Provides the user with an overview of all referral sources. This allows the user to **analyze the effectiveness of their advertising dollars in terms of referrals and purchase ratio**. It identifies sales opportunities and tested not sold appointments. Using the pulldowns you have the option to view an individual clinic or “all clinics” and an individual provider or “all providers”.

Referral Source Details - Direct Mailing

Referral Report for Direct Mailing in Oak Ridge

Advertising Description	Count	Sales Ops	Sales Ops with Test	TNS	No Loss	Units Sold	Purchase Ratio
(empty)	5	4	2	0	0	5	63%
crm.111.1111	1	1	1	0	0	2	100%
Total	6	5	3	0	0	7	70%

21. **REFERRAL REPORT DETAIL:** You can click on the any of the referral sources in the Referral Report to view a more detailed report: **Direct Mailing, Medical Referral, Newspaper Ad, Patient Referral, Radio Spot, TV Ad, Telemarketing or Yellow Pages Listing**.

Sycle Overview (6) – Reports (cont.)

REFERRAL REPORT (Cont):

Referral Report

Start: Jan 01 2003
End: Jan 30 2003

Referral Report For: Oak Ridge Clinic Stats

Referral Report for Oak Ridge

Referral Source	Count	Sales Ops	Sales Ops with Test	TNS	No Loss	Units Sold	Purchase Ratio
Current Patient	0	0	0	0	0	0	0%
Direct Mailing	5	4	2	0	0	5	63%
Insurance / Third Party	0	0	0	0	0	0	0%
Medical Referral	8	7	4	2	0	2	14%
Newspaper	10	7	3	2	0	4	29%
Online	0	0	0	0	0	0	0%
Open House	0	0	0	0	0	0	0%
Open House / Telemarketing	0	0	0	0	0	0	0%
Patient Referral	4	4	2	0	0	5	63%
Radio	6	6	4	0	0	17	142%
TV	4	4	2	1	0	2	25%
Telemarketing	1	1	1	0	0	2	100%
Walk-in	0	0	0	0	0	0	0%
Yellow pages	4	4	3	1	0	3	38%
Total	42	37	21	6	0	40	54%

	A	B	C	D	E	F	G	H
1	Referral Source	Count	Sales Ops	Sales Ops with Test	TNS	No Loss	Units Sold	Purchase Ratio
2	Current Patient	0	0	0	0	0	0	0%
3	Direct Mailing	5	4	2	0	0	5	63%
4	Insurance / Third Party	0	0	0	0	0	0	0%
5	Medical Referral	8	7	4	2	0	2	14%
6	Newspaper	10	7	3	2	0	4	29%
7	Online	0	0	0	0	0	0	0%
8	Open House	0	0	0	0	0	0	0%
9	Open House / Telemarketing	0	0	0	0	0	0	0%
10	Patient Referral	4	4	2	0	0	5	63%
11	Radio	6	6	4	0	0	17	142%
12	TV	4	4	2	1	0	2	25%
13	Telemarketing	1	1	1	0	0	2	100%
14	Walk-in	0	0	0	0	0	0	0%
15	Yellow pages	4	4	3	1	0	3	38%
16	Total	42	37	21	6	0	40	54%

22. **DOWNLOAD OR DOWNLOAD ALL:** Allows you to download the Referral Report directly into an Excel Document onto your desktop.

System Overview (6) – Reports (cont.)

Marketing Report

Patient Type: Prospect
 Current
 Competitive

Parent Company: Test Company
 Clinics: Oak Ridge
 Shady Oakes
 Happy Valley
 Maple View

Report Type: Tested not Sold

Last Appt: Jan 01 2003 through June 31 2003

View Report Download

Tested not Sold_Oak Ridge DOWNLOAD

First	Last	Preferred	Date of Birth	Last Appt	Address1	Address2	City	State	Zip	Area Code	Phone	Send Mail	Call	HIPAA Waiver Signed
Margaret	Campbell	Peggy	06/22/1937	06/04/2003	33 West End Dr.		Tiburon	CA	94321	415	222-2345			
Ima	Drillbit			02/11/2003				CA		401	555-1212			
Gary	Holdt	Gary	06/07/1932	02/12/2003	23 Easton		San Francisco	CA	92333	0				
Soupy	Sales			05/03/2003				OH		414	223-1234			

23. **MARKETING REPORT:** The Marketing Report allows the user to organize and download mailing lists in the following categories: **Birthdates, Purchase Dates, Consultant, Zip Code, Consultant and Purchase Date, Patient Type, Tested Not Sold and Manufacturer Warranty Expiration.** You can select as many clinics as you wish and set specific dates.

First	Last	Preferred	Date of Birth	Purchase Date	Address1	Address2	City	State	Zip	Area Code	Phone
Archibald	Aisolen	Archie	1921-05-05	2003-04-20	345 gate house		San Mateo	CA	97654	415	587-8765
Andrew	Powers		1970-05-05	0000-00-00				CA	0	0	-
Hank	Aaron	Mr. Aaron	1948-05-04	2003-05-15	1 Homerun Drive		Mountain View	CA	94657	415	555-1212
Kieth	Richards	Kieth	1959-05-05	2000-04-30				CA	0	0	-
John	Adamsen	John	1952-05-04	2003-02-17	345 Johnsway Rd		Felx	CA	98264	222	555-1212
Bill	Blass		1950-05-01	2003-03-08	14 Central Park West		New York City	NY	2	401	555-1221
Frank	Bakko		1940-05-28	2003-04-24	45 Western		Berkeley	CA	95678	510	555-9990
commission	report-test		1957-05-01	2003-04-05				CA		0	-

24. **DOWNLOAD:** Allows you to download the specific **Marketing Report** directly into an **Excel Document** onto your desktop, which you can take to your local mail house.



Cycle Overview (7) – Practice/Appointment Flow – “The life of an appointment”

Cycle is designed to run using the same appointment flow as most practices. Typically, an appointment is made, a patient is seen and notes/next steps are recorded. Your work is finished. From here Cycle takes over. If a patient made a purchase, a receipt will be generated and a thank you letter printed and sent. The inventory will automatically populate with the purchase just completed, and the sale is automatically added to all reports.

The Cycle Appointment Flow:

Make Appointment > Confirm Appointment > Have Appointment > Update Patient Record.

Step 1 Make Appointment: An appointment is made. An orange triangle with the letter “N” for “not confirmed” appears next to the patient’s name.

Step 2 Confirm Appointment: The day before, the receptionist clicks on the Call List and confirms patient appointments by telephone. As the patients confirm, the receptionist clicks the “confirmed” button next to their name in the Call List. This changes the orange triangle with the letter “N” to a green triangle with the letter “C” for “confirmed”. This allows for a quick scan of the day to check for any unconfirmed appointments. **Note:** Appointments can also be confirmed by clicking on the patient’s name directly on the schedule. This will create a pop-up that includes a “confirm appointment” button. Simply click on the button to confirm the appointment.

Step 3 The Appointment: A patient visits. The results of the appointment are noted in the patient’s file.

Step 4 Update Patient Record: The provider returns the file to the receptionist. The receptionist clicks on the patient’s name followed by a click on the “enter outcome” button in the resulting pop-up. The receptionist can now update the patient’s file, including any purchases, mailings they should receive, level of hearing loss, etc. Entering the outcome automatically “completes” the appointment and changes the green triangle with the “C” to a blue triangle with a check mark, indicating that the appointment has been completed.

Sycle Overview (7) – Practice/Appointment Flow (cont.) – “The life of an appointment”

Appointment Outcome

Patient: Ken Dryden
Preferred Name:
Clinic: Oak Ridge
Provider: Christy Smith
Type: Fitting
Referral Source: Current Patient
Mailing Code:
Referral Name:

Date: 06/18/03
Time: 10:30 am
Length: 90 minutes
Status: Not Confirmed
Preferred Lang: English
Age: 59

Notes:

Left Ear Hearing Loss
Level: 1 2 3 4 5 6
Type: Sensorineural
 Conductive
 Mixed
Test Price: \$

Right Ear Hearing Loss
Level: 1 2 3 4 5 6
Type: Sensorineural
 Conductive
 Mixed
Test Price: \$

Outcome Notes:

Tinnitus:
Medical Referral:

Repair Left Hearing Aid: **Repair Right Hearing Aid:**

Mail Status: Don't Send Mail

Birthday Card Confirmation Letter Thank You Letter Test No Sale
 Clean and Check

Purchases Batteries Accessories/ALD Extended Service Plans

(Partial view)

Optional: Sycle features built-in outcome forms, which can be printed out and given to the provider for a quick snapshot of the patient.

A. The outcome form contains a patient summary, including preferred name, age, address, etc., along with a brief description of the patient’s last few visits, notes about this appointment and an area for the provider to fill in information.

B. From the Call List, the receptionist can print outcome forms for all patients scheduled for a particular day. Outcome forms can be printed individually by clicking directly on the patient’s name on the schedule, then clicking on the “print outcome forms” button in the resulting pop-up.

C. During the appointment, the provider can make note directly on the outcome form. These might include level of hearing loss, general notes and any purchases.

Sycle Overview (8) - How to make an appointment

There are several ways to make an appointment; we will explain the most commonly used method. If you would like to review other ways to make an appointment, please see Appendix A.

Selecting the Date and Time

Step 1: Choose the appointment date by clicking on the calendar (the page will reload).

Step 2: Click on the starting time of the appointment. This will activate a search pop-up.

January 30, 2003

show clinic: Oak Ridge | show provider: All Providers | find appointment type: --Select One-- | length: 0 min | find next

STEP 1

Time	James Mitchell	Christy Smith
9:00 am	Janet DeLuca Fitting	
9:15 am		
9:30 am		
9:45 am		Jack Feldman Clean n Check
10:00 am		
10:15 am		
10:30 am	Christin Ridge Clean n Check	STEP 2
10:45 am		
11:00 am		
11:15 am	Leo Berns Hearing Exam	
11:30 am		
11:45 am		
12:00 pm		
12:15 pm		

Printable Schedule: All Providers | print...

enter patient | search

Add a new patient

Step 3: Simply type the first few letters of the patient's first or last name and click on the search button. A **search results page will load** with a short list of possible matches.

Results For: search

STEP 3

close

jar | search | search all clinics | Add a new patient | Schedule Block

Sycle Overview (8) – How to make an appointment (cont.)

Step 4: Select your patient from the list or you can click on the “add a new patient” link located next to the “search all clinics” button. For this example we will use Janet Jones, clicking on her name takes you directly to the New Appointment page.

Results For: jan
Appointment: Friday, June 20 at 10:30 am

search results (6) close

Patient Name	Phone Number	Preferred Name	Left Battery	Right Battery
Janet DeLuca	(401) 278-8888(home)	Janet	●	●
Jane Doe	(415) 421-5555(home)	jane	●	●
Janet Jones	(412) 123-1236(home)		●	●
Janet Linde	(415) 555-1475(home)	Jan	●	●
Jane Noe	(510) 888-8989(home)		●	●
Jane Seymore	(415) 244-6789(home)		●	●

search close

jan search search all clinics [Add a new patient](#) | [Schedule Block](#)

STEP 5: New Appointment. You can now:

- Select the type of appointment.
- Select the referral source.
- Change the length of time for an appointment.
- Add any additional information in the notes box.
- Add their name if referral is another patient (i.e. John Smith).
- You can give the advertising piece a brief description. .
- If you have selected physician referral, (from referral source b.), a small pop-up box will load. Find or add the physician's name.
- Press continue to advance to patient confirmation.

New Appointment

Patient: Janet . Jones continue

identity

Address: 13 Grant Ave.
San Francisco, CA 94132

Patient Type: Current
Phone Number: (412) 123-1236 (home)
E-mail Address:

appointment

Clinic: Oak Ridge a
Provider: Christy Smith
Type: Hearing Exam b
Referral Source: Direct Mailing
Advertising Desc.: Summer Special
Referral Name:

Date: 06/20/03 c
Time: 10:30 am
Length: 60 minutes
Status: Not Confirmed

Notes:

h

continue close

Medical Referral
Dr. Grant Evans, M.D. g

title: Dr.
first name:
last name:
suffix:

close submit

Sycle Overview (9) - How to “squeeze” an appointment

Appointment “Squeeze”: The appointment squeeze feature is designed to give the receptionist greater scheduling flexibility.

To squeeze an appointment, click on the small light blue boxes located to the right of an existing appointment. An existing appointment can be shortened from any length down to 15 minutes. Clicking on the small light blue boxes to the right of the grey appointment box will initiate the new appointment beginning at the selected time and shorten the existing appointment.

In the example below, Christin Ridge has a 30-minute Clean and Check appointment scheduled to begin at 10:15. Christin’s appointment has been squeezed into Janet DeLuca’s Fitting appointment. Janet’s appointment shortens by 15 minutes (from 90 to 75 minutes) to accommodate Christin’s appointment.

January 30, 2003

show clinic: show provider: find appointment type: length: min

<< Jan 2003 go >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	-27-	28	29	30	31	

Printable Schedule:

[Add a new patient](#)

▼ Scroll ▲	James Mitchell	Christy Smith
9:00 am	Janet DeLuca Fitting	
9:15 am		
9:30 am		
9:45 am		Jack Feldman Clean n Check
10:00 am		
10:15 am	Christin Ridge Clean n Check	Janet Jones Hearing Exam
10:30 am		
10:45 am		
11:00 am		
11:15 am	Leo Berns Hearing Exam	Gertrude Bendel Hearing Exam
11:30 am		
11:45 am		
12:00 pm		
12:15 pm		

1

Sycle Overview (10) - How to block the schedule

SCHEDULE BLOCK: Is used to block out time on the appointment schedule for Provider appointments outside the clinic such as dentist appointments, doctors appointments, etc.

Step 1: To block time for a provider, click on the day and time on the appointment schedule. Click on the “Schedule Block” link located on the search pop-up

Results For:

search close

search search all clinics [Add a new patient](#) | [Schedule Block](#) STEP 1

Step 2: On the **Schedule Block** pop-up you can fill in the **length of time** to be blocked from the schedule and a description of the appointment. Click save.

Schedule Block

schedule block

Clinic: Oak Ridge
 Provider: James Mitchell STEP 2
 Date: 06/26/03
 Start Time: 9:00 am
 Length: hours -OR- until closed (6:00 pm)
 Description:

Save close

Step 3: The appointment schedule will reload reflecting the time blocked from the schedule.

Sample
[Help](#) | [Sign Out](#) | [Contact Us](#) | [Feedback](#)

[appointments](#) | [reports](#) | [marketing](#) | [administration](#)

> PATIENT SEARCH
 /GO/

June 26, 2003

show clinic: show provider: find appointment type: length: min find next

Printable Schedule:

[Add a new patient](#)

▼ Scroll ▲	Landon Binstock	James Mitchell	Christy Smith
9:00 am		Dentist Appointment	
9:15 am			
9:30 am			
9:45 am			
10:00 am	Joe 10 Speech Therapy		
10:15 am			
10:30 am			
10:45 am			
11:00 am			
11:15 am			
11:30 am	Quincy Adams Hearing Exam		
11:45 am			
12:00 pm			

STEP 3

Sycle Overview (11) - How to move an appointment

Step1: Select the appointment you wish to move by clicking on the patient's name on the schedule (i.e.: Jack Feldman).

The screenshot shows the Sycle.net interface for January 30, 2003. The top navigation bar includes links for Help, Sign Out, Contact Us, and Feedback. Below the navigation bar, there are tabs for appointments, reports, marketing, and administration. The main area displays a calendar for January 2003, with the 30th highlighted. To the right of the calendar is a schedule grid for two providers: James Mitchell and Christy Smith. The appointment for Jack Feldman at 9:45 am is highlighted with a red box labeled "STEP 1".

Step 2: Clicking on the “cancel/reschedule” button will load a pop-up. Again, click on the cancel and reschedule button.

Appointment Summary

Patient: **Jack Feldman** (415) 388-4949
Time Since Last Purchase: 76 days

The screenshot shows the Appointment Summary pop-up window. The window is divided into two main sections: "appointment" and "current equipment".

appointment

- Clinic: Oak Ridge
- Provider: Christy Smith
- Type: Clean n Check
- Referral Source: Returning Patient
- Mailing Code:
- Referral Name:
- Notes:
- Date: 01/30/03
- Time: 9:45 am
- Length: 30 minutes
- Status: Not Confirmed

current equipment

Left Ear	Right Ear
Equipment: Beltone Invisa - Silica CIC Digital	Equipment: Beltone Invisa - Silica CIC Digital
Serial Number:	Serial Number:
Appt Date: 11-15-2002	Appt Date: 11-15-2002
Purchase Price: \$ 2400.00	Purchase Price: \$ 2400.00
Warranty Exp. 11/15/03	Warranty Exp. 11/15/03

Buttons at the bottom include: print intake form, enter intake, print outcome form, enter outcome, cancel / reschedule, and close. A red box labeled "STEP 2" highlights the "cancel / reschedule" button.

Cycle Overview (11) - How to move an appointment (cont.)

Step 3: You may now either reschedule the appointment or cancel it.



Step 4: To reschedule, click on the “reschedule” button, located in the lower left corner. To cancel, click on the “cancel appointment” button in the lower right corner.

Appointment Summary

Patient: **Jack Feldman** (415) 388-4949
Time Since Last Purchase: 76 days

appointment	
Clinic: Oak Ridge	Date: 01/30/03
Provider: Christy Smith	Time: 9:45 am
Type: Clean n Check	Length: 30 minutes
Referral Source: Returning Patient	Status: Reschedule
Mailing Code:	
Referral Name:	
Notes:	
reschedule	cancel appointment
close	

Step 5: In the white space just above the schedule you will receive a prompt: **Rescheduling appointment for** (in this example Jack Feldman): **Please select a date and time.** Select a new date and time to reschedule your appointment, complete the New Appointment and Appointment Confirmation pop-ups and the schedule will reload with your rescheduled appointment. Or, if the patient would like to reschedule at a later date, simply click on the “cancel” button and the patient’s name will appear in the call list under the reschedule category.

January 30, 2003

show clinic: show provider: find appointment type: length: min [find next](#)

<< [go](#) >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

[Week at a glance](#) [Today](#)

Rescheduling appointment for Jack Feldman: Please select a date and time

[cancel](#)

▼ Scroll ▲	STEP 5	Christy Smith
9:00 am		
9:15 am		
9:30 am		
9:45 am		
10:00 am		
10:15 am		
10:30 am		Janet Jones

Sycle Overview (12) - How to make a purchase

How to Make a Purchase: There are basically two ways to make a purchase, **A1: Appointment Outcome** or **A2: Quick Purchase**.

A1: Appointment Outcome: Most Hearing Aid sales will take place as a result of a **diagnostic appointment**. As an appointment record is updated, there is an opportunity to add purchases made during the visit.

Step 1: From the Appointment Page, click on the patient's name (we will use Blaine Fuller) to reach the **Appointment Summary**.

The screenshot shows the Sycle.net interface for July 17, 2003. At the top, there is a navigation bar with links for Help, Sign Out, Contact Us, and Feedback. Below this is a menu with options for appointments, reports, marketing, and administration. A search bar is present with the text 'enter patient' and a '/GO/' button.

The main content area displays a calendar for July 2003. The 17th is highlighted. Below the calendar is a 'Printable Schedule' section with a 'print...' button. To the right is a grid of appointments for the day. The grid has columns for providers: Landon Binstock, James Mitchell, and Christy Smith. The 10:00 am slot under Christy Smith is highlighted with a red box labeled 'A1'. Below this appointment, there is a red box labeled 'STEP 1' pointing to the 'enter outcome' button.

Time	Landon Binstock	James Mitchell	Christy Smith
9:00 am	Joyce Carol Hearing Exam	Ned Divine Hearing Exam	
9:15 am			
9:30 am			
9:45 am			
10:00 am		Leo Berns Clean n Check	Blaine Fuller Hearing Exam
10:15 am	Christin Ridge		
10:30 am			
10:45 am			
11:00 am			
11:15 am			
11:30 am			
11:45 am			
12:00 pm			

Step 2: Locate the “enter outcome” button and click on it to load the **Appointment Outcome** page.

Appointment Summary

Patient: **Blaine Fuller** (510) 466-3454
Time Since Last Purchase: no purchases found

The screenshot shows the Appointment Summary page for Blaine Fuller. The page has a purple header with the word 'appointment' and buttons for 'confirm appointment', 'no show', and 'edit'. The main content area is divided into two columns. The left column contains details: Clinic: Oak Ridge, Provider: Christy Smith, Type: Hearing Exam, Referral Source: Direct Mailing, Advertising Desc.: 4th of July Spe, Referral Name: (blank), and Notes: (blank). The right column contains: Date: 07/17/03, Time: 10:00 am, Length: 60 minutes, and Status: Not Confirmed. At the bottom of the page, there are several buttons: 'print intake form', 'enter intake', 'print outcome form', 'enter outcome', 'cancel / reschedule', and 'close'. A red box labeled 'STEP 2' highlights the 'enter outcome' button.

Sycle Overview (12) - How to make a purchase (cont.)

A1: Appointment Outcome (Cont)

Step 3: The **Appointment Outcome** page allows you to record hearing loss, add notes, check the appropriate mailing lists, add purchases and view previous receipts and previous appointments. As you scroll down the Appointment Outcome page, you will see the “**Yes**” button selected, this is located underneath the purchases sub-heading. (“Yes” is the default setting for purchases). Click the “**save**” button on the Appointment Outcome page to load the **Purchase Page**.

purchases

Time since last hearing aid purchase: no purchases found

Were there any purchases with this appointment? (including hearing tests)

Yes
 No

STEP 3

previous receipts

Date	Total	Amount Due
------	-------	------------

previous appointments

2002-10-30 Repair

Step 4: On the Purchase Page, purchases are organized in vertical columns for the left and right ears, respectively. Blaine Fuller has decided to purchase a right ear hearing aid. You have the opportunity to enter a tracking number and **change the purchase date**, the default setting is “today’s date”.

Purchase

Appointment: Thursday, July 17 at 10:00

Patient: Blaine Fuller

Staff: Christy Smith

Tracking #: 00501

Purchase Date: 07 / 17 / 2003

hearing aids

Left Ear	Right Ear
Manufacturer: --Select One--	Manufacturer: Beltone
Type: --Select One--	Type: BTE
Model: --Select One--	Model: D61- Polara
Technology Lvl: --Select One--	Technology Lvl: Digital
Battery Type: --Select One--	Battery Type: 312 High Power
Purchase	Purchase
Base Price: \$	Base Price: \$ 2800
Discount: --Select One--	Discount: 20% Discount
Discount Amount: \$	Discount Amount: \$ 560.00
Purchase Price: \$	Purchase Price: \$ 2240.00
Sales Tax: <input type="checkbox"/> yes	Sales Tax: <input type="checkbox"/> yes
Manufacturer Warranty: <input type="text"/> years	Manufacturer Warranty: <input type="text"/> 1 years

STEP 4

Sycle Overview (12) - How to make a purchase (cont.)

A1: Appointment Outcome (Cont)

Step 4 (Cont): Scrolling down the Purchase Page you will notice that the Earmold box (for the Right Ear) is selected. **For all BTE Hearing Aid purchases earmolds will be selected and active.** (you can deselect them if you wish). **Complete the Purchase Page,** by entering **Insurance Estimates, Diagnostic Services, Batteries, Extended Warranties and Accessories.** Click on the save button and the Receipt will load showing your purchases.

earmolds	
Left Ear Type: <input type="text" value="--Select One--"/>	Right Ear Type: <input type="text" value="Hearing Aid Earmold"/>
Price per Item: <input type="text"/>	Price per Item: <input type="text" value="0"/>
Quantity: <input type="text"/>	Quantity: <input type="text" value="1"/>
Total Price: \$ <input type="text"/>	Total Price: \$ <input type="text" value="50.00"/>
	STEP 4
insurance estimate	
Insurance Company: <input type="text" value="--Select One--"/>	
Est Benefit: \$ <input type="text"/>	
Notes: <input type="text"/>	
repairs	
Hearing Aid: <input type="text" value="--Select One--"/>	
Description / Notes: <input type="text"/>	
Estimated Price: \$ <input type="text"/>	
Hearing Aid: <input type="text" value="--Select One--"/>	
Description / Notes: <input type="text"/>	
Estimated Price: \$ <input type="text"/>	
diagnostic services	
Service: <input type="text" value="--Select One--"/>	
batteries	
Size: <input type="text" value="--Select One--"/>	Size: <input type="text" value="312 High Power"/>
Brand: <input type="text" value="--Select One--"/>	Brand: <input type="text" value="Audibel 8 pack"/>
Price per Item: <input type="text"/>	Price per Item: <input type="text" value="20"/>
Quantity: <input type="text"/>	Quantity: <input type="text" value="1"/>
Total Price: \$ <input type="text"/>	Total Price: \$ <input type="text" value="20.00"/>
Sales Tax: <input type="checkbox"/> yes	Sales Tax: <input type="checkbox"/> yes
	STEP 4
warranties and extended service plans	
Left Ear Plan: <input type="text" value="--Select One--"/>	Right Ear Plan: <input type="text" value="--Select One--"/>
Purchase Price: \$ <input type="text"/>	Purchase Price: \$ <input type="text"/>
Sales Tax: <input type="checkbox"/> yes	Sales Tax: <input type="checkbox"/> yes
accessories/ALDs	
Accessory: <input type="text" value="--Select One--"/>	
Description: <input type="text"/>	
Purchase Price: \$ <input type="text"/>	
Sales Tax: <input type="checkbox"/> yes	
Accessory: <input type="text" value="--Select One--"/>	
Description: <input type="text"/>	
Purchase Price: \$ <input type="text"/>	
Sales Tax: <input type="checkbox"/> yes	
<input type="button" value="Save"/>	<input type="button" value="close"/>

Cycle Overview (12) - How to make a purchase (cont.)

A1: Appointment Outcome (Cont)

Step 5: You can now review your purchases. The Receipt Page allows you to **delete** the purchase receipt, **add** a purchase, **edit** your current purchase, **print**, take a **payment** add a **fee** or return to the **appointment summary**.

Receipt

Patient: [Blaine Fuller](#)
456 Conneticut , San Francisco CA 94578
(510) 466-3454

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: Christy Smith
Date: 2003-07-17
Tracking #: 00501

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Belton D61- Polara BTE Digital Discount: \$560.00 (20% Discount)	\$2800.00	\$2240.00
1	Hearing Test	Service: Hearing Test		\$115.00
1	Battery	Battery: Audibel 312 High Power	\$20.00	\$20.00
1	Earmold	Hearing Aid Earmold		\$50.00
Total				\$2425.00
Sales Tax				\$0.00
Grand Total				\$2425.00
Amount Due				\$2425.00

STEP 5

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

A2: Quick Purchase: Is used primarily for walk-in patients that would like to purchase batteries, an extended warranty or an accessory.

Step 1: Matilda Brown walks into the clinic to purchase batteries. Enter the first few letters of Matilda's name in the search box on the appointment schedule page to load the search results. **Click on the "purchase" link located to the right of Matilda's name.** (If you accidentally click on Matilda's name, the Patient Summary page will load where you can easily click on the "purchase" button and proceed by following the steps outlined here.)

Results For: Matil

search results (1)

Patient Name	Phone Number	Preferred Name	L	R	Action
Matilda Brown	(415) 777-8978(home)				appt purchase repair

STEP 1

search

[Add a new patient](#)

Sync Overview (12) - How to make a purchase (cont.)

A2: Quick Purchase (Cont):

Step 2: When making a Quick Purchase **you must select a Staff member**. Also the hearing aid purchase section contains an explanation asking the user to **attribute the hearing aid sale to a previous appointment** or directing the user to create a new appointment.

Purchase

Patient: **Matilda Brown**
 Staff:
 Tracking #:
 Purchase Date:

hearing aids

Hearing aid purchases need to be associated with an appointment, preferably their most recent appointment. If you would like to add a hearing aid purchase to this patient's most recent appointment please click here. Otherwise you will need to create a new appointment for this patient.

Most recent appointment : Hearing Exam 2003-07-15 (Completed)

STEP 2

[add hearing aid purchase to this appointment](#)

Step 2 (Cont): Scroll down the Purchase page until you reach the batteries and select the item and price. Click the “save” button to load the Receipt page.

diagnostic services

Service:

Price: \$

Sales Tax: yes

Service:

Price: \$

Sales Tax: yes

batteries

Size:

Brand:

Price per Item:

Quantity:

Total Price: \$

Sales Tax: yes

Size:

Brand:

Price per Item:

Quantity:

Total Price: \$

Sales Tax: yes

STEP 2

warranties and extended service plans

Left Ear Plan:

Purchase Price: \$

Right Ear Plan:

Purchase Price: \$

Cycle Overview (12) - How to make a purchase (cont.)

A2: Quick Purchase (Cont):

Step 3: You can now review your purchase. The Receipt Page allows you to **delete** the purchase receipt, **add** a purchase, **edit** your current purchase, **print**, take a **payment** or add a **fee**.

Receipt

Patient: [Matilda Brown](#)
56 West Port , San Francisco CA 94123
(415) 777-8978

Oak Ridge
 Oak Ridge 435 Second Ave., Oak Ridge OH
 45631
 (740) 446-7619
Provider: James Mitchell
Date: 2003-07-18
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Battery	Battery: Audibel 13 High Power	\$25.00	\$25.00
Total				\$25.00
Sales Tax				\$0.00
Grand Total				\$25.00
Amount Due				\$25.00

STEP 3

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

Sync Overview (13) - How to make a payment

Step 1: Enter the first few letters of the patient's name and the **search results** pop-up will load. Click on the patient's name to view the **Patient Summary**. (for this example, Blaine Fuller will make a payment).

Results For: blai


search results (1) close

Patient Name	Phone Number	Preferred Name	L	R	Action
Blaine Fuller	(510) 466-3454(home)			●	appt purchase repair

search close

blai /GO/ search all clinics [Add a new patient](#)

Step 2: Scroll down the **Patient Summary** until you reach the **receipts** sub-heading. **Click on the link located directly underneath the Date** (purchases will be listed in descending order by most recent date). For this example, click on **7/17/03** to load the **Receipt**.

 Sample
[Help](#) | [Contact Us](#) | [Feedback](#) print close

Patient: Blaine Fuller purchase new appointment

identity quick edit edit full intake archive

Full Name: Blaine Fuller, Patient Type: Current
 Preferred Name: Gender:
 Address: 456 Conneticut Date of Birth: 01-17-1927
 San Francisco, CA 94578 Age: 76
 Preferred Language:
 Phone Number: (510) 466-3454 (home)
 Email Address:

equipment edit

return exchange repair

Right Ear
 Equipment: Beltone D61- Polara Sensorineural Digital
 Serial Number:
 Purchase Date: 07-17-2003
 Battery Type: 312 High Power

Purchase
 Purchase Price: \$ 2240.00
 Warranty Exp: 07/16/04

receipts

Date	Total	Amount Due
07/17/2003	\$2425.00	\$2425.00

edit

Cycle Overview (13) - How to make a payment (cont.)

Step 3: Click on the “payment” button to enter a new payment or to delete a payment.

Receipt

Patient: [Blaine Fuller](#)
456 Conneticut , San Francisco CA 94578
(510) 466-3454

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: Christy Smith
Date: 2003-07-17
Tracking #: 00501

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Beltone D61- Polara BTE Digital Discount: \$560.00 (20% Discount)	\$2800.00	\$2240.00
1	Hearing Test	Service: Hearing Test		\$115.00
1	Battery	Battery: Audibel 312 High Power	\$20.00	\$20.00
1	Earmold	Hearing Aid Earmold		\$50.00

Total \$2425.00
Sales Tax \$0.00
Grand Total **\$2425.00**
Amount Due **\$2425.00**

STEP 3

receipts for this patient

Total Amount Due

Step 4: The **Add Payment** window allows the user to change the date of a payment (enter past payments or postdate a check). Select payment type, enter the amount, then **click “save”**, to reload the Receipt showing your new payment.

Amount Due: \$2425.00

Date

Type

STEP 4

Amount

Description

Add new payment here:

07 18 2003

Visa \$500 total amt

Step 5: The Receipt loads showing the payment and balance due.

Receipt

Patient: [Blaine Fuller](#)
456 Conneticut , San Francisco CA 94578
(510) 466-3454

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: Christy Smith
Date: 2003-07-17
Tracking #: 00501

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Beltone D61- Polara BTE Digital Discount: \$560.00 (20% Discount)	\$2800.00	\$2240.00
1	Hearing Test	Service: Hearing Test		\$115.00
1	Battery	Battery: Audibel 312 High Power	\$20.00	\$20.00
1	Earmold	Hearing Aid Earmold		\$50.00
	Payment	Visa 07/18/2003		\$500.00

Total \$2425.00
Sales Tax \$0.00
Grand Total **\$2425.00**
Amount Due **\$1925.00**

STEP 5

Cycle Overview (13) - How to make a payment (cont.)

Step 6: To delete a payment click on the “Payment” link (underlined in blue) on the Receipt. The Payment pop-up window will load with a “delete this payment” link.

Receipt

Patient: [Blaine Fuller](#)
456 Connecticut , San Francisco CA 94578
(510) 466-3454

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: Christy Smith
Date: 2003-07-17
Tracking #: 00501

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Beltone D61- Polara BTE Digital Discount: \$560.00 (20% Discount)	\$2800.00	\$2240.00
1	Hearing Test	Service: Hearing Test		\$115.00
1	Battery	Battery: Audibel 312 High Power	\$20.00	\$20.00
1	Earmold	Hearing Aid Earmold		\$50.00
	Payment	Visa 07/18/2003		\$500.00
Total				\$2425.00
Sales Tax				\$0.00
Grand Total				\$2425.00
Amount Due				\$1925.00

STEP 6

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

Step 7: Click on the “delete this payment” link. Once the payment has been deleted, you have the opportunity to make a new payment.

Amount Due: \$1925.00

STEP 7

Date	Type	Amount	Description
delete this payment			
07 / 18 / 2003	Visa	500.00	

[Add a new payment](#)

Cycle Overview (14) - How to make a return/exchange

Return:

Step 1: Enter the first few letters of the patient's name and the **search results** pop-up will load. Click on the patient's name to view the **Patient Summary**. (for this example, Alice Beeler will return her hearing aid).

Results For: alice

search results (1) close

Patient Name	Phone Number	Preferred Name	L	R	Action
Alice Beeler			●	●	appt purchase repair

search close

alice [/GO/](#) [search all clinics](#) [Add a new patient](#)

Step 2: Scroll down the Patient Summary until you reach the equipment sub-heading. Click on the **“return”** button to load the “return” pop-up.

equipment edit

STEP 2 [return](#) [exchange](#) [repair](#) [return](#) [exchange](#) [repair](#)

Left Ear
 Equipment: Beltone Invisa - Polara Sensorineural Digital
 Serial Number: 789
 Purchase Date: 01-14-2003
 Battery Type: 10A

Right Ear
 Equipment: Beltone Opera - Oria Sensorineural Digital
 Serial Number:
 Purchase Date: 07-15-2003
 Battery Type: 13 High Power

Purchase
 Purchase Price: \$ 2025.00
 Warranty Exp: 01/13/05

Purchase
 Purchase Price: \$ 2000.00
 Warranty Exp: 07/14/04

receipts

Date	Total	Amount Due
07/15/2003	\$2000.00	\$1000.00
06/28/2003	\$60.00	\$0.00
06/28/2003	\$60.00	\$60.00
02/18/2003	\$5.00	\$5.00
01/14/2003	\$2025.00	\$-1475.00

insurance edit

Step 3: The **“return”** pop-up asks you to confirm the return. In this case, Alice Beeler is returning her left hearing aid, which is a Beltone Invisa – Polara. Simply click **“ok”**, and a second confirmation pop-up will load. Click **“ok”** once more and a **Credit Receipt** window will load showing your return.

OK to return this hearing aid?

- Beltone Invisa - Polara CIC Digital (789)

Return Date: 07 18 2003

[ok](#) [close](#)

STEP 3

Cycle Overview (14) - How to make a return/exchange

Step 4: The credit Receipt shows that Alice Beeler returned a hearing aid 1/14/03 and shows the hearing aid that she returned 7/18/03. **To make a credit payment click on the “credit” button.**

Receipt

Patient: [Alice Beeler](#)
467 Arkansas , San Francisco CA 94122
(415) 777-2323

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: Christy Smith
Date: 2003-01-14
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Left Hearing Aid	Beltone Invisa - Polara CIC Digital	\$2025.00	\$2025.00
1	Left Hearing Aid	Beltone Invisa - Polara CIC Digital Returned 2003-07-18		(\$2025.00)
1	Right Hearing Aid	Beltone Invisa - Polara CIC Digital	\$2025.00	\$2025.00
1	Right Hearing Aid	Beltone Invisa - Polara CIC Digital Returned 2003-01-14		(\$2025.00)
	Payment	Check 01/14/2003 a bad check		\$500.00
	Payment	Visa 01/18/2003		\$1000.00
	Payment	AMEX 01/28/2003		\$2000.00
Total				\$0.00
Sales Tax				\$0.00
Grand Total				\$0.00
Amount Owed				(\$3500.00)

[credit](#) [fee](#) **STEP 4** [delete](#) [edit](#) [print](#) [close](#)

Step 5: You can change the day, month and year of the credit payment, select the type of credit and the amount.

Amount Owed: \$3500.00 **STEP 5**

Date	Type	Amount	Description
Add new credit here: <input type="text" value="07"/> <input type="text" value="18"/> <input type="text" value="2003"/>	<input type="text" value="Check"/>	<input type="text" value="\$3500.00"/> total amt	<input type="text"/>

[save](#) [close](#)

Step 6: The Receipt reflects the return amount has been credited in full.

Receipt

Patient: [Alice Beeler](#)
467 Arkansas , San Francisco CA 94122
(415) 777-2323

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: Christy Smith
Date: 2003-01-14
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Left Hearing Aid	Beltone Invisa - Polara CIC Digital	\$2025.00	\$2025.00
1	Left Hearing Aid	Beltone Invisa - Polara CIC Digital Returned 2003-07-18		(\$2025.00)
1	Right Hearing Aid	Beltone Invisa - Polara CIC Digital	\$2025.00	\$2025.00
1	Right Hearing Aid	Beltone Invisa - Polara CIC Digital Returned 2003-01-14		(\$2025.00)
	Payment	Check 01/14/2003 a bad check		\$500.00
	Payment	Visa 01/18/2003		\$1000.00
	Payment	AMEX 01/28/2003		\$2000.00
	Credit	Check 07/18/2003		\$3500.00
Total				\$0.00
Sales Tax				\$0.00
Grand Total				\$0.00
Amount Due				\$0.00

[payment](#) [fee](#) **STEP 4** [delete](#) [edit](#) [print](#) [close](#)

Cycle Overview (14) - How to make a return/exchange (cont.)

Exchange:

Step 1: From the **Patient Summary** page, scroll down once again to the equipment sub-head. You can see that the left hearing aid “return” has been recorded. Now Alice would like to exchange her right hearing aid. Click on “exchange” to activate the “exchange” pop-up.

Date	Total	Amount Due
07/15/2003	\$2000.00	\$1000.00
06/28/2003	\$60.00	\$0.00
06/28/2003	\$60.00	\$60.00
02/18/2003	\$5.00	\$5.00

Step 2: The “exchange” pop-up asks you to confirm the exchange. Click “ok” to load the Exchange page.

OK to exchange this hearing aid?

- Beltone Opera - Oria ITC Digital

Return Date:

STEP 2

Step 3: To complete the exchange, select the new hearing aid and purchase price (as you would when making a new purchase).

Exchange

Patient: Alice Beeler
 Staff:
 Tracking #:
 Exchange Date:
 Exchanging For: Beltone Opera - Oria ITC Digital

hearing aids	
Left Ear	Right Ear
Manufacturer: <input type="text" value="--Select One--"/>	Manufacturer: <input type="text" value="Siemens"/>
Type: <input type="text" value="--Select One--"/>	Type: <input type="text" value="ITE"/>
Model: <input type="text" value="--Select One--"/>	Model: <input type="text" value="Prisma"/>
Technology Lvl: <input type="text" value="--Select One--"/>	Technology Lvl: <input type="text" value="Digital"/>
Battery Type: <input type="text" value="--Select One--"/>	Battery Type: <input type="text" value="13 High Power"/>
Purchase	Purchase
Base Price: \$ <input type="text"/>	Base Price: \$ <input type="text" value="2600"/>
Discount: <input type="text" value="--Select One--"/>	Discount: <input type="text" value="20% Discount"/>
Discount Amount: \$ <input type="text"/>	Discount Amount: \$ <input type="text" value="520.00"/>
Purchase Price: \$ <input type="text"/>	Purchase Price: \$ <input type="text" value="2080.00"/>
Sales Tax: <input type="checkbox"/> yes	Sales Tax: <input type="checkbox"/> yes

STEP 3

Sycle Overview (14) - How to make a return/exchange (cont.)

Step 4: The **Receipt** will show the exchange and the new amount due, as well as any negative or positive balance. You can also click on the “fee” button to add a restocking fee.

Receipt

Patient: [Alice Beeler](#)
 467 Arkansas , San Francisco CA 94122
 (415) 777-2323

Oak Ridge
 Oak Ridge 435 Second Ave., Oak Ridge OH
 45631
 (740) 446-7619
Provider: Landon Binstock
Date: 2003-07-15
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Beltone Opera - Oria ITC Digital Discount: \$200.00 (\$200 Trade in)	\$2200.00	\$2000.00
1	Right Hearing Aid	Beltone Opera - Oria ITC Digital Discount: \$200.00 (\$200 Trade in) Returned 2003-07-18		(\$2000.00)
1	Right Hearing Aid	Siemens Prisma ITE Digital Discount: \$520.00 (20% Discount) Purchased 2003-07-18	\$2600.00	\$2080.00
	Payment	Check 07/18/2003		\$1000.00
Total				\$2080.00
Sales Tax				\$0.00
Grand Total				\$2080.00
Amount Due				\$1080.00

STEP 4

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

Step 5: A \$50.00 restocking fee has been added to the Receipt.

Amount Owed: ~~-\$1130.00~~

Date	Type	Amount	Description
07/18/2003	Restocking Fee	\$50.00	

Add new fee here:

STEP 5

Receipt

Patient: [Alice Beeler](#)
 467 Arkansas , San Francisco CA 94122
 (415) 777-2323

Oak Ridge
 Oak Ridge 435 Second Ave., Oak Ridge OH
 45631
 (740) 446-7619
Provider: Landon Binstock
Date: 2003-07-15
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Beltone Opera - Oria ITC Digital Discount: \$200.00 (\$200 Trade in)	\$2200.00	\$2000.00
1	Right Hearing Aid	Beltone Opera - Oria ITC Digital Discount: \$200.00 (\$200 Trade in) Returned 2003-07-18		(\$2000.00)
1	Right Hearing Aid	Siemens Prisma ITE Digital Discount: \$520.00 (20% Discount) Purchased 2003-07-18	\$2600.00	\$2080.00
	Fee	Restocking Fee 07/18/2003		\$50.00
	Payment	Check 07/18/2003		\$1000.00
Total				\$2130.00
Sales Tax				\$0.00
Grand Total				\$2130.00
Amount Due				\$1130.00

STEP 5

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

Cycle Overview (15) - How to make a repair

Step 1: For this example we will use John Reed. Type John's name (or the first few letters) and click the search button.

cycle.net
[Help](#) | [Sign Out](#) | [Contact Us](#) | [Sample Feedback](#)

appointments reports marketing administration

PATIENT SEARCH
 enter patient /GO/

January 30, 2003

show clinic: Oak Ridge show provider: All Providers find appointment type: --Select One-- length: 0 min [find next](#)

Jan 2003 go

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Printable Schedule: All Providers [print...](#)

john reed [search](#) **STEP 1**
[Add a new patient](#)

Scroll	Landon Binstock	James Mitchell	Christy Smith
8:00 am			
8:15 am			
8:30 am			
8:45 am			
9:00 am		Janet DeLuca Fitting	
9:15 am			
9:30 am			Martin Bowman Fitting
9:45 am			
10:00 am			
10:15 am			
10:30 am		Christin Ridge Clean n Check	Janet Jones Hearing Exam
10:45 am			
11:00 am			

Step 2: Locate John Reed's name on the search results page and click the repair link.

Results For: john reed
 search results (18) [close](#)

Patient Name	Phone Number	Preferred Name	L	R	Action
John Reed					appt purchase repair STEP 2
John Adams	(555) 555-1212(work)	John	●	●	appt purchase repair
John Adamson	(222) 555-1212(home)	John	●	●	appt purchase repair
John Doe	(555) 555-5555(home)	John	●	●	appt purchase repair

Step 3: Enter the hearing aid type, a brief description of the repair and an estimate for the work to be performed. Click the save button to load the **Receipt** window.

Repair

Patient: John Reed
 Staff: James Mitchell
 Tracking #: 00765
 Purchase Date: 03 17 2003

repairs

Hearing Aid: Other
 Description: high pitched noise
 Estimated Price: \$85 **STEP 3**

Hearing Aid: --Select One--
 Description:
 Estimated Price: \$

Cycle Overview (15) - How to make a repair (cont.)

Step 4: The **Receipt window** reflects the repair and the estimated cost of the repair. If you like, you can print a copy of this estimate to give to the patient or click on the “close” button to reload the schedule page.

Receipt		Oak Ridge Oak Ridge 435 Second Ave., Oak Ridge OH 45631 (740) 446-7619	
Patient: John Reed 32 Sierra Vista , Corte Madera CA 95674 (415) 333-3453		Provider: James Mitchell Date: 2003-03-17 Tracking #:	

Quantity	Item	Description	Cost	Amount
1	Repair Estimate	Repair high pitched noise Estimated price=\$85.00		
				Total \$0.00
				Sales Tax \$0.00
				Grand Total \$0.00
				Amount Due \$0.00

STEP 4

payment
fee

delete

add
edit
print
close

Step 5: To check-in a Hearing Aid once it has been repaired, locate the **Inventory Box** on the schedule page and click on it to load the **Inventory Page**. Scroll down to review the **Repair Check-In**. You will see John Reed’s repair is listed. Enter the serial number S/N, and the cost. Click on the “**save**” button.

Repair Check-In	
Patient: Mr. Tom Ashworth Equipment: Resound Canta 780 BTE Digital Description: foo Send Date: 03/02/2003	<div style="border: 1px solid black; padding: 5px; display: inline-block; font-weight: bold; color: red;">STEP 5</div>
Patient: Mr. John Reed Equipment: Description: high pitch Send Date: 03/14/2003	<input type="checkbox"/> Repaired <input type="text" value=""/> S/N <input type="text" value="\$"/> Cost
	<input checked="" type="checkbox"/> Repaired <input type="text" value="00765"/> S/N <input type="text" value="\$85.00"/> Cost
save	

Sycle Overview (15) - How to make a repair (cont.)

Step 6: John Reed's name is now on the call list. Scroll down the call list until you reach the repair pickup subheading. His name will stay on the call list as a reminder until he has been contacted (click patient notified) or until the Remove from Call List option has been selected.

repair pickup	
Patient: Mrs. Margaret Campbell (Peggy)	<input type="radio"/> Patient Notified
Phone Number: (415) 222-2345 (home)	<input type="radio"/> Remove from Call List
Message: Your repaired hearing aids are in and ready for you to pick up.	
Patient: Mr. John Reed ()	<input checked="" type="radio"/> Patient Notified
Phone Number: (0) 0-0 (home)	<input type="radio"/> Remove from Call List
Message: Your repaired hearing aids are in and ready for you to pick up.	
<input type="button" value="save"/> <input type="button" value="print call list"/> <input type="button" value="print outcome forms"/>	<input type="button" value="close"/>

STEP 6

Step 7: When John Reed arrives to collect his repaired hearing aid, locate his name under **Repairs to be Delivered to Patient** on the Inventory Page and click on the **Deliver to Patient** link.

Repair Check-In	
Patient: Mr. Tom Ashworth	<input type="checkbox"/> Repaired
Equipment: Resound Canta 780 BTE Digital	<input type="text" value=""/> S/N
Description: foo	<input type="text" value=""/> Cost
Send Date: 03/02/2003	
<input type="button" value="save"/>	
Repairs To Be Delivered To Patient	
Patient: Mr. John Adamson	Deliver to Patient
Equipment:	
Description: danavox - Door is broken	
Send Date: 02/26/2003	
Arrival Date: 02/26/2003	
Patient: Mrs. Margaret Campbell	Deliver to Patient
Equipment:	
Description: uyt	
Send Date: 02/28/2003	
Arrival Date: 03/15/2003	
Patient: Mr. John Reed	Deliver to Patient
Equipment:	
Description: high pitch	
Send Date: 03/14/2003	
Arrival Date: 03/15/2003	
<input type="button" value="save"/> <input type="button" value="close"/>	

STEP 7

Step 8: Enter the **final price and select sales tax if applicable.** Click the “save” button. The Receipt page will load automatically..

Deliver Repaired Hearing Aid

Patient: John Reed	
Deliver Hearing Aid	
Estimated Price: \$85.00	STEP 8
Actual Cost: \$ <input type="text" value="85.00"/>	
Final Price: \$ <input type="text"/>	
Sales Tax: <input type="checkbox"/> yes	
insurance estimate	
Insurance Company: --Select One--	
Est Benefit: \$ <input type="text"/>	
Notes: <input type="text"/>	
<input type="button" value="Save"/>	<input type="button" value="close"/>

Sycle Overview (15) - How to make a repair (cont.)

Step 9: The Purchase Receipt page shows the final price charged for the repair. You can take a payment, edit, print or close the receipt.

Receipt

Patient: [John Reed](#)
32 Sierra Vista , Corte Madera CA 95674
(415) 333-3453

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619
Provider: James Mitchell
Date: 2003-07-18
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Repair	Repair high pitched noise		\$85.00

Total \$85.00
Sales Tax \$0.00
Grand Total **\$85.00**
Amount Due **\$85.00**

STEP 9

other receipts for this patient

Step 10: A repair is handled like any other purchase. In our example, John Reed has decided to pay the total amount of his repair at the time of pick-up.

Amount Due: \$85.00

Date **Type** **Amount** **Description**

Add new payment here:

03 | 15 | 2003 Cash \$85.00 total amt

STEP 10

- Cash
- Check
- Visa
- MC
- AMEX
- Discover
- Insurance
- Other

Cycle Overview (16) - How to perform a Global Search

Global Search is a multi-clinic feature which allows you to search for a patient in more than one clinic, and to move a patient (patient record) from one clinic to another.

Step 1: Enter the first few letters of the patient's name and the **search results** page will load. (We will use Edward Smithson for this example)

The screenshot shows the Cycle.net interface for January 30, 2003. The search bar contains the text 'smi' and the 'search' button is highlighted. A callout box labeled 'STEP 1' points to the search bar. The interface also shows a calendar for January 2003, a list of providers (James Mitchell, Christy Smith), and a list of appointment types (Janet DeLuca Fitting, Martin Bowman Fitting, Christin Ridge Clean n Check, Janet Jones Hearing Exam, Leo Berns Hearing Exam).

Step 2: Click on “**search all clinics**”. Edward Smithson is not in our search results for the Oak Ridge Clinic. We are sure he is a patient at one of our other clinics.

The screenshot shows the search results for 'smi'. The results list 10 patients, including Agnes T. Smith, Bill Smith, Frank Smith, John Smith, Mary Smith, Sara Smith, TOM SMITH, and John Smithers. A callout box labeled 'STEP 2' points to the 'search all clinics' button. The interface also shows a 'search' bar with 'smi' and a 'close' button.

Patient Name	Phone Number	Preferred Name	L	R	Action
Agnes T. Smith	(415) 553-3216(home)	Aggie	●		schedule appt purchase
Bill Smith			●	●	schedule appt purchase
Frank Smith	(415) 505-1214(home)		●		schedule appt purchase
Frank Smith					schedule appt purchase
John Smith	(415) 555-1212(home)	Mr. Smith		●	schedule appt purchase
John Smith					schedule appt purchase
Mary Smith	(401) 822-1222(home)		●		schedule appt purchase
Sara Smith					schedule appt purchase
TOM SMITH					schedule appt purchase
John Smithers					schedule appt purchase

Sycle Overview (16) - How to perform a Global Search (cont.)

Step 3: The search results for all clinics show Edward Smithson as a patient at Shady Oakes clinic. We can click on the patient's name to review or edit the **Patient Summary** or click on the “**change clinic**” link to move the patient to another clinic.

Results For: smi

search results (16) close

Patient Name	Phone Number	Preferred Name	Clinic	Action
Agnes Smith	(415) 555-1234(home)	Mr. Smith	Maple View	Change Clinic
Agnes T. Smith	(415) 553-3216(home)	Aggie	Oak Ridge	Change Clinic
Alan Smith	(503) 122-1234(home)		Maple View	Change Clinic
Bill Smith	(0) 0-0(home)		Oak Ridge	Change Clinic
Bob Smith	(503) 572-6391(home)		Maple View	Change Clinic
Frank Smith	(415) 505-1214(home)		Oak Ridge	Change Clinic
Frank Smith	(0) 0-0(home)		Oak Ridge	Change Clinic
Joe Smith	(0) 0-0(home)		Maple View	Change Clinic
John Smith	(415) 555-1212(home)	Mr. Smith	Oak Ridge	Change Clinic
John Smith	(503) 0-0(home)		Oak Ridge	Change Clinic
Mary Smith	(401) 822-1222(home)		Oak Ridge	Change Clinic
Mary Smith	(401) 555-5555(home)		Maple View	Change Clinic
Sara Smith	(0) 0-0(home)		Oak Ridge	Change Clinic
TOM SMITH	(0) 0-0(home)		Oak Ridge	Change Clinic
John Smithers	(0) 0-0(home)		Oak Ridge	Change Clinic
Edward Smithson	(310) 334-1212(home)		Shady Oakes	Change Clinic

STEP 3

Step 4: Using the **clinic pulldown**, you can **select the new clinic for your patient**.



Patient: Edward Smithson
Current Clinic: Shady Oakes

Please select the clinic you would like to move Edward Smithson to:

[/GO/](#) close

Oak Ridge
Shady Oakes
Happy Valley
Maple View

STEP 4

Step 5: The **confirmation pop-up** lets you know that Edward Smithson has been moved to the Oak Ridge Clinic.

Patient: Edward Smithson
Current Clinic: Oak Ridge

STEP 5

Edward Smithson has been moved from **Shady Oakes** to **Oak Ridge**

close

Appendix A: Other ways to make an appointment

Following are two other frequently used methods for making appointments, **Version 2: Patient Search** and **Version 3: Add a New Patient**.

Version 2: Patient Search

Step 1: Enter the first few letters of the patient's first or last name in the search box (i.e. ada) and click the "search" button.

The screenshot shows the Asycle.net interface. At the top, there's a navigation bar with links for appointments, reports, marketing, and administration. The search box contains 'ada' and a 'GO/' button. Below the search box, there are filters for 'show clinic' (Oak Ridge), 'show provider' (All Providers), and 'find appointment type' (--Select One--). A calendar for January 2003 is on the left, and a table of appointments is on the right. A red box labeled 'STEP 1' points to the search button.

Step 2: Select your patient's name (i.e. John Adamson, Jr.) and the **Patient Summary** will load.

The screenshot shows the search results page. The search box contains 'ada' and a 'GO/' button. Below the search box, there's a table of search results. The first row contains 'John Adamson' with phone number '(222) 555-1212(home)'. A red box labeled 'STEP 2' points to the search button.

Patient Name	Phone Number	Preferred Name	L	R	Action
John Adamson	(222) 555-1212(home)	John	●	●	appt purchase repair

Appendix A: Other ways to make an appointment (cont.)

Step 3: In the white space just above the schedule you will see the prompt: **Scheduling appointment for** (in this example, **John Adamson: Please select a date and time**). Select the date and time under the provider of your choice.

January 30, 2003

show clinic: show provider: find appointment type: length: min

<< go >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25

Scheduling appointment for John Adamson: Please select a date and time

▼ Scroll ▲	Ja	Christy Smith
9:00 am	Janet DeLuca	
9:15 am	Fitting	
9:30 am		

Step 4: Select the type of appointment, the length of time, the referral source and enter any additional information in the notes box. Click “continue”.

New Appointment

Patient: John . Adamson

identity

Address: 345 Johnsway Rd
Felix, CA 98264

Patient Type: Current
Phone Number: (222) 555-1212 (home)
E-mail Address:

appointment

Clinic: Oak Ridge
Provider: Christy Smith
Type:

Referral Source:

Advertising Desc.:
Referral Name:

Notes:

Date: 07/30/03
Time: 11:45 am
Length: minutes
Status:

Appointment Confirmation

Patient: John . Adamson

Identity

Address: 345 Johnsway Rd
Felix, CA 98264

Patient Type: Current
Phone Number: (222) 555-1212 (home)
E-mail Address:

Appointment

Your appointment is on Wednesday, July 30 at 11:45 am with Ms. Smith at the Oak Ridge for a Clean n Check.

[Confirmation Letter](#)

*Mail piece is currently not turned on.

Step 6: Verify the information and click “save”, the schedule will reload with the appointment you just made.

Note: You have the option to send the patient a **Confirmation Letter** by simply clicking on the Confirmation Letter box. If you choose to send a Confirmation Letter, allow 7 days before the actual date of the appointment.

Appendix A: Other ways to make an appointment (cont.)

Version 3: Add a New Patient

Step 1: Click on “Add a new patient” and a New Patient Intake Form will load.



V 3

July 17, 2003

show clinic: show provider: find appointment type: length: min

							▼ Scroll ▲	Landon Binstock	James Mitchell	Christy Smith
9:00 am							Joyce Carol Hearing Exam	Ned Divine Hearing Exam		
9:15 am										
9:30 am										
9:45 am										
10:00 am								Leo Berns Clean n Check	Blaine Fuller Hearing Exam	
10:15 am							Christin Ridge			
10:30 am										
10:45 am										
11:00 am										
11:15 am										
11:30 am										
11:45 am										
12:00 pm										

Printable Schedule:
All Providers

enter patient
 STEP 1

Step 2: New Patient Intake Form - fill in as much information as possible (detailed information on this form for Celia Martin can be completed later). Click “save”.

identity

Title: Patient Type:
 First Name: Gender:
 Middle Initial: Date of Birth:
 Last Name: Preferred Language:
 Suffix: **STEP 2**
 Preferred Name:
 Address 1: **Phone Numbers** **Primary**
 Address 2: **Work:**
 City: **Cell:**
 State/Province: **Other:**
 Zip/Postal Code: **Email Address**
 Country:

privacy

HIPAA Waiver Signed:
 Do Not Send Mail:
 Do Not Call:

guardian

Guardian Name:
 Relationship to Patient:
 Phone Number:

(Partial view)

Appendix A: Other ways to make an appointment (cont.)

Step 3: The search results page loads with the new patient (Celia Martin) you have just entered. **Click on the “appt” link.**

Results For:
search results (1) close

Patient Name	Phone Number	Preferred Name	L	R	Action
Cecilia R. Martin STEP 3	(415) 335-1290(home)	Celia			appt purchase repair

search **STEP 4** close

[/GO/](#) [search all clinics](#) [Add a new patient](#)

Step 4 – Step 6: Refer to Steps 4, 5 and 6 described above (see version 2). Select the **Date and Time**, fill in **New Appointment** form by selecting type of appointment, length and referral source, then verify information in the **Appointment Confirmation**.