sycle.net

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.

sycle.net

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, Sycle 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. Sycle makes it easy, whichever way you choose.

Patient Management

Sycle 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.

Sycle effortlessly maintains your patient records. As you make and complete each appointment, Sycle 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

Sycle Overview (2) – Log in
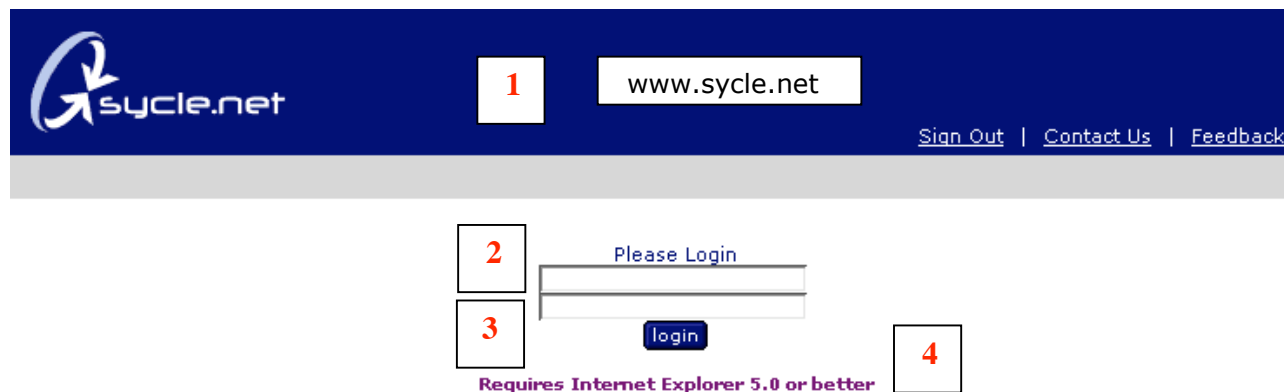
1. **LOGIN PAGE:** To use Sycle, you need to login at the start of each day. To do this, go to http://www.sycle.net and login. You can sign out at any time. You can also make Sycle your default landing page by selecting the following in your browser: Under "Tools", select "Internet Options"; under the "General" tab's home page option, type in http://www.sycle.net. Click on "Apply" then "OK" and Sycle.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:** Sycle 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.

Sycle Overview (3) – Global Site Navigation

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).

Sycle 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.

Sycle Overview (4) – Appointments

Appointments – Main Navigation: Items 1 through 3.

1. **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.

2. **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.**

3. **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.

Sycle Overview (4) – Appointments (cont.)

Appointments – Main Navigation: Items 4 through 7.

4. **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.

5. **PURCHASES:** Allows you to view receipts for the day or for the week.

6. **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.

7. **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.

Sycle Overview (5) – Administration

1. **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.

2. **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.

3. **CALENDER:** 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.)

Scroll Up	Oak Ridge	Landon 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				

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

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.

Sycle Overview (6) – Reports

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

1. **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**.

2. **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.

3. **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.

4. **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).

Sycle Overview (6) – Reports (cont.)

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).

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

Sycle Overview (6) – Reports (cont.)

(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 [8] DOWNLOAD

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%**

Weekly Referral [8] DOWNLOAD

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**

weekly_sales.xls

	A	B	C	D	E	F	G	H
1	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
12								

8. **DOWNLOAD or DOWNLOAD ALL:** Allows you to download all or specific report information directly into an **Excel Documen**t onto your desktop. For this example we downloaded the Weekly Receipts report.
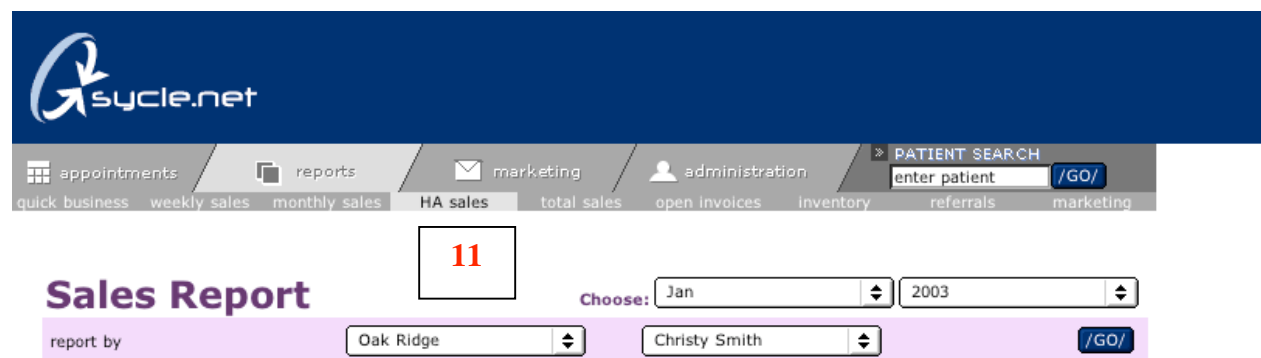
Sycle Overview (6) – Reports (cont.)

(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.**

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

Sycle Overview (6) – Reports (cont.)

(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 pulldowns 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.

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.

Sycle Overview (6) – Reports (cont.)

Oak Ridge | Christy Smith

DOWNLOAD

Total Sales

Sale Date	Provider Name	Patient's Name	Office	Type	Description	Notes	Gross Price	Discount	Net Price	Insurance Estimate
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

Sale Date	Provider Name	Patient's Name	Office	Type	Description	Notes	Gross Price	Discount	Net Price	Insurance Estimate
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	Bernafon 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 Suprimo BTE Conventional		$2000.00	$0.00	$2000.00	$0.00
						TOTAL:	$7000.00	$0.00	$7000.00	$0.00

13. **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.

14. **DOWNLOAD:** Allows you to download the **Total Sales Report directly into an Excel Document onto your desktop**.

Sycle Overview (6) – Reports (cont.)
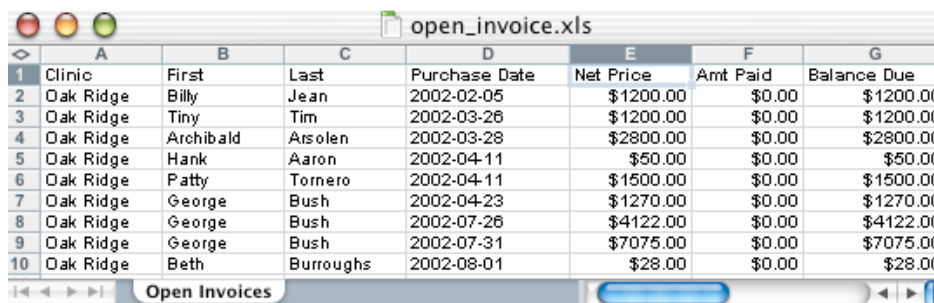

Open Invoice Report

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	**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.

Sycle Overview (6) – Reports (cont.)

OPEN INVOICE REPORT (Cont)

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

17.
Sycle Overview (6) – Reports (cont.)

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**.

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

Sycle Overview (6) – Reports (cont.)

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".

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):

21

21

Referral Report for Oak Ridge   DOWNLOAD

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%**

referral_report.xls

	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%
17								

Referral Report for Oak Ridge

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

Sycle Overview (6) – Reports (cont.)

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.

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.**

Sycle Overview (7) – Practice/Appointment Flow – "The life of an appointment"

Sycle 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 Sycle 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 Sycle Appointment Flow:
Make Appointment > Confirm Appointment > Have Appointment > Update Patient Record.

<u>Step 1</u> **Make Appointment:** An appointment is made. An orange triangle with the letter "N" for "not confirmed" appears next to the patient's name.

<u>Step 2</u> **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.

<u>Step 3</u> **The Appointment:** A patient visits. The results of the appointment are noted in the patient's file.

<u>Step 4</u> **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: ☐ Sensoneural
☐ Conductive
☐ Mixed
Test Price: $

Right Ear Hearing Loss

1 2 3 4 5 6
☐ Sensoneural
☐ Conductive
☐ Mixed
$

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 makes 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.

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.

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**.

STEP 5: New Appointment. You can now:
- **a.** Select the type of appointment.
- **b.** Select the referral source.
- **c.** Change the length of time for an appointment.
- **d.** Add any additional information in the notes box.
- **e.** Add their name if referral is another patient (i.e. John Smith).
- **f.** You can give the advertising piece a brief description. .
- **g.** If you have selected physician referral, (from referral source b.), a small pop-up box will load. Find or add the physician's name.
- **h.** Press continue to advance to patient confirmation.

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

Step 6: You can verify your information on the Appointment Confirmation Page. Once you **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.
.

Appointment Confirmation

STEP 6

Patient: Janet . Jones   save

Identity

Address: 13 Grant Ave.   **Patient Type:** Current
                                                         Phone Number: (412) 123-1236 (home)
San Francisco, CA 94132   **E-mail Address:**

Appointment   **Send Mailings**

Your appointment is on Friday, June 20 at 10:30 am with Ms. Smith   ☐ Confirmation Letter
at the Oak Ridge for a Hearing Exam.

                                                         *Mail piece is currently not turned on.

save   close

*Schedule page below showing appointment just scheduled for Janet Jones.

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 DeLucca's Fitting appointment. Janet's appointment shortens by 15 minutes (from 90 to 75 minutes) to accommodate Christin's appointment.

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

.

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.

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

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).

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

Sycle 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.

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.

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.**

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

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   **STEP 3**
○ No

previous receipts
Date   Total   Amount Due

previous appointments
  2002-10-30 Repair

Save   close

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		**STEP 4**
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: ☐ yes		Sales Tax: ☐ yes	
Manufacturer Warranty: ☐ years		Manufacturer Warranty: 1 years	

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		Right Ear	
Type:	--Select One--	Type:	Hearing Aid Earmold	
Price per Item:		Price per Item:	0	
Quantity:		Quantity:	1	**STEP 4**
Total Price: $		Total Price: $	50.00	

insurance estimate

Insurance Company: --Select One--
Est Benefit: $
Notes:

repairs

Hearing Aid: --Select One--
Description / Notes:
Estimated Price: $

Hearing Aid: --Select One--
Description / Notes:
Estimated Price: $

diagnostic services

Service: --Select One--

batteries

Size:	--Select One--		Size:	312 High Power	
Brand:	--Select One--		Brand:	Audibel 8 pack	
Price per Item:			Price per Item:	20	
Quantity:			Quantity:	1	**STEP 4**
Total Price: $			Total Price: $	20.00	
Sales Tax:	yes		Sales Tax:	yes	

warranties and extended service plans

Left Ear Plan: --Select One--   Right Ear Plan: --Select One--
Purchase Price: $ Purchase Price: $
Sales Tax: yes   Sales Tax: yes

accessories/ALDs

Accessory: --Select One--
Description:
Purchase Price: $
Sales Tax: yes

Accessory: --Select One--
Description:
Purchase Price: $
Sales Tax: yes

Save   close

Sycle 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**.

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.)

Sycle 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.

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.

Sycle 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

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH 45631
(740) 446-7619

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

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	**STEP 3**	$0.00
Grand Total		**$25.00**
Amount Due		**$25.00**

[payment] [fee] [delete] [add] [edit] [print] [close]

other receipts for this patient

Date	Total	Amount Due

Sycle 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).

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.**

Sycle 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

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619

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

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**

payment fee   delete   add edit print close

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   [   ]
save   close

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

Receipt

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH
45631
(740) 446-7619

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

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

STEP 5

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

payment fee   delete   add edit print close

Sycle 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.

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

Sycle 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	

STEP 1

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   **Right Ear**
Equipment: Beltone Invisa - Polara Sensorineural Digital   Equipment: Beltone Opera - Oria Sensorineural Digital
Serial Number: 789   Serial Number:
Purchase Date: 01-14-2003   Purchase Date: 07-15-2003
Battery Type: 10A   Battery Type: 13 High Power

Purchase   Purchase
Purchase Price: $ 2025.00   Purchase Price: $ 2000.00
Warranty Exp: 01/13/05   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

Sycle 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

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH 45631
(740) 446-7619

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

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:
07 ▲ 18 ▲ 2003   Check ▼ $ 3500.00 total amt   close
save

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

Receipt

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH 45631
(740) 446-7619

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

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**

STEP 4

payment fee   delete   edit print close

Sycle 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.**

equipment	STEP 1	edit

return | exchange | repair

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

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

insurance   edit

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: 07 | 18 | 2003
ok | close   **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: Landon Binstock
Tracking #:
Exchange Date: 07 | 18 | 2003
Exchanging For: **Beltone Opera - Oria ITC Digital**

hearing aids		

	Left Ear		Right Ear	
Manufacturer:	--Select One--		Manufacturer:	Siemens
Type:	--Select One--		Type:	ITE
Model:	--Select One--		Model:	Prisma
Technology Lvl:	--Select One--		Technology Lvl:	Digital
Battery Type:	--Select One--		Battery Type:	13 High Power

	Purchase	**STEP 3**		Purchase
Base Price: $			Base Price: $	2600
Discount :	--Select One--		Discount :	20% Discount
Discount Amount: $			Discount Amount: $	520.00
Purchase Price: $			Purchase Price: $	2080.00
Sales Tax: ☐ yes			Sales Tax: ☐ yes	

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

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH 45631
(740) 446-7619

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

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

[payment] [fee]   [delete]   [edit] [print] [close]

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

Add new fee here:
[07] [18] [2003]   [Restocking Fee] $ [50] total amt   [_____]   [close]
[save]

STEP 5

Receipt

Oak Ridge
Oak Ridge 435 Second Ave., Oak Ridge OH 45631
(740) 446-7619

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

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

STEP 5

Total		$2130.00
Sales Tax		$0.00
Grand Total		**$2130.00**
Amount Due		**$1130.00**

[payment] [fee]   [delete]   [edit] [print] [close]

other receipts for this patient

Sycle 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.

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

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.

Sycle 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   Provider: James Mitchell
32 Sierra Vista , Corte Madera CA 95674   Date: 2003-03-17
(415) 333-3453   Tracking #:

Quantity	Item	Description	Cost	Amount
1	Repair Estimate	Repair high pitched noise Estimated price=$85.00 **STEP 4**		

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

[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	☐ Repaired
Equipment: Resound Canta 780 BTE Digital **STEP 5**	_____ S/N
Description: foo	$_____ Cost
Send Date: 03/02/2003	
Patient: Mr. John Reed	☑ Repaired
Equipment:	00765 S/N
Description: high pitch	$ 85.00 Cost
Send Date: 03/14/2003	

[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.

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.

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

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

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

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

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**

[payment] [fee]   **STEP 9**   [delete]   [add] [edit] [print] [close]

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

[save]   Check   **STEP 10**   [close]

                     Visa
                     MC
                     AMEX
                     Discover
                     Insurance
                     Other

Sycle 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)

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.

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.

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

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

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.

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

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.

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".

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.

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".**

(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**.

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.**