sycle

The #1 Hearing Care Practice Management Solution

Sycle Private Practice Administration User Guide

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SYCLE RESOURCES

Sycle Practice Site:

A Sycle test site is available for anyone wanting to practice using Sycle. Call **888-881-7925** for the current user name and password.

Sycle Customer Experience Team:

Technical support is available by telephone or email. **888-881-7925** or **support@sycle.net**

Sycle Insurance Team:

Insurance billing support on all levels including support as you set up your Sycle site, e-claims services, credentialing, and full service billing. Call **888-881-7925** and ask to speak with an insurance specialist.

Custom Training:

Training is available to all Sycle users, new or advanced. Realize the full potential of Sycle in your clinic and ensure all staff members are trained on using the software. Call **888-881-7925** and ask to speak with a trainer.

Sycle Users Guides:

Reference guides are available for using Sycle. Click the “Need Help?” to download the user guides.

Pre-Recorded Training:

- To view our library of training videos, click **videos** on the top of **Home Page.**
- Audiology Online pre-recorded training videos: **https://www.audiologyonline.com**
- You Tube: **https://www.youtube.com/SycleNet**

Professional Associations:

Sycle continues to develop partnerships in the industry to bring maximum benefit to our customers.
Call **888-881-7925** for more information.

NOAH Sycle Sync (NOAH 4 compatible)

LACE

HealthiPlan Financing (for your patients)

Change Healthcare (Insurance e-claim filing)

Quick Books Sync

e-Docs (scan & upload patient files into Sycle)

CallSource – coming soon!

PLEASE MAKE SURE TO TURN OFF POP UP BLOCKERS TO ACCURATELY VIEW ALL SYCLE SCREENS.

OVERVIEW OF ADMINISTRATION HOME PAGE

To open the **Administration** section of Sycle, click on the gray **Administration** tab located at the top of **Home Page.**

A list of **administration** categories is on the left side of the page. As you work through each topic, you will customize settings, products and services for your clinic(s).

A recommended flow for setting up your clinic(s) with minimal duplication follows:

1. Clinic(s)
2. Staff
3. Regional Categories
4. Taxes (if applicable)
5. Purchases Categories
6. Scheduling Categories
7. Contacts Categories
8. Insurance Categories
9. E-Documents, NOAH, Counsel Ear, Quick Books and LACE are set up when added to clinic services

Sycle provides complimentary support as you work through the **Administration** set up process. Customized training with a Sycle trainer is available as well as technical support from our Customer Experience Team. Contact us at **888-881-7925** or **support@sycle.net.**

CLINIC SET UP

Notes:

- *If you have multiple clinics, set up the main clinic first and then the other clinics.*
- *The data you enter onto the clinic pages is used by Sycle to populate forms such as hearing aid orders, repair orders and hcfa forms. When entering data on this page, eliminate punctuation to allow hcfa forms to auto-populate without punctuation.*

MAIN CLINIC SET UP:

- In the lower left hand corner of Home Page, locate **clinics** section. Click **edit** to open.
- Select the **clinic** for which you want to enter information.

Insurance billing: Fill in required clinic information if utilizing Sycle to send insurance claims.

Shipping address: An additional shipping address could be added if different then the clinic location.

Hours of Operation: These are the hours the doors are open for this clinic. (Staff schedules will be entered in a different section.)

Duplicate Checking: Select this option if you would like Sycle to alert users that they may be entering duplicate information. Eg: When creating a new patient summary, if the newly entered information closely mirrors an existing patient, Sycle will ask if you want to “allow” the new information or “cancel” if it is a duplicate.

Hearing aid purchase preference: On the bottom of the “Hearing Aid Purchase” screen, there are four additional items that can be added to a Hearing Aid order: Earmolds, Receivers, Domes, Tubes.

This administration preference allows you to choose whether you want the screen for these additional items to open every time a new Purchase screen opens or remain collapsed until manually clicked to open. (see examples below)

- **“Collapsed”** view to right leaves the screens to add Earmolds, Receivers, Domes and Tubes closed. Simply click on the item name to open a pop up screen to add that item to the order.

Note: Sycle will default to “collapsed” view if no preferences are otherwise selected.

- **"Expanded"** view automatically opens the order screen for that item every time a Hearing Aid Purchase screen opens. To allow any items to appear in "**Expanded**" view:

1. Check the box beside "**Use custom preferences**".
2. Click the circle beside the items you wish to automatically open in "**expanded**" view.

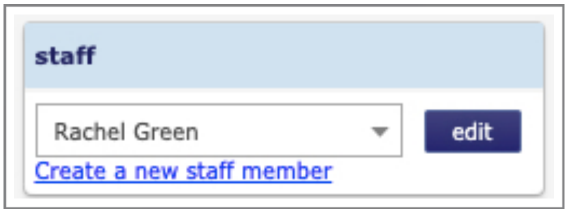
In the view to right, the Earmold Purchase screen is "expanded". Receiver and Dome screens remain "collapsed".

Once the **main clinic** page is complete, click **save** and **close** to return to the Administration main menu. Complete a **clinic** set up page for any additional clinics in your company.

ADDING STAFF MEMBERS

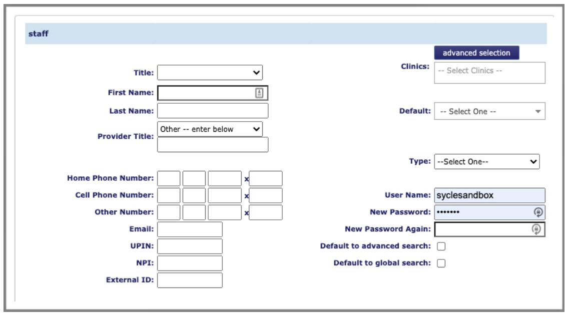
In the lower left hand corner of Home Page, locate **staff** section.

Click **Create a new staff member** to add staff.



Once a staff member page has been created, it can be edited anytime using the drop down menu to select the staff member's name and click **edit**. A common editing function is periodically changing staff passwords for security.

CREATING A NEW STAFF MEMBER PAGE:



Enter name and contact information for the staff member.

Enter UPIN and NPI if applicable.

Clinics: Select the clinic(s) where this staff member will be working.

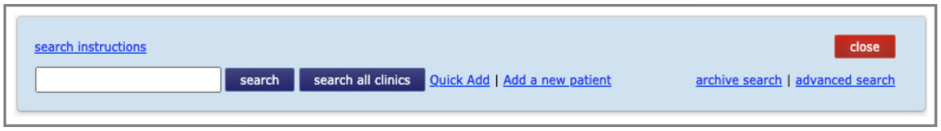
Type: Using the drop down menu, select a general category for this staff member.

Note: To give anyone a column, they must be categorized as "Provider". Provider names will appear in alphabetical order on the scheduling calendar.

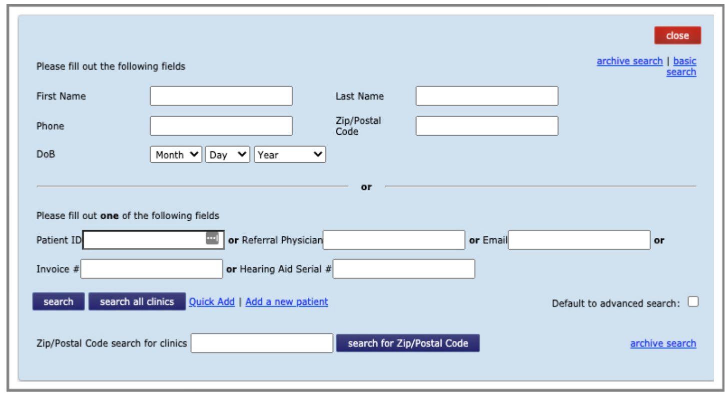
User Name and Password: These are established by the company's Sycle administrator and can be changed as desired for security purposes.

Default to advanced search: Choose what search field you prefer when your home page opens. The "Basic" view includes a search field for patient name. The "Advanced" view includes search fields by serial or invoice number, date of birth, phone, etc.…

Basic search view:
(Sycle defaults to Basic search unless Advanced search is selected)



<u>Advanced search view:</u>
(To select Advanced search, place a check in the box in the lower right corner of screen)



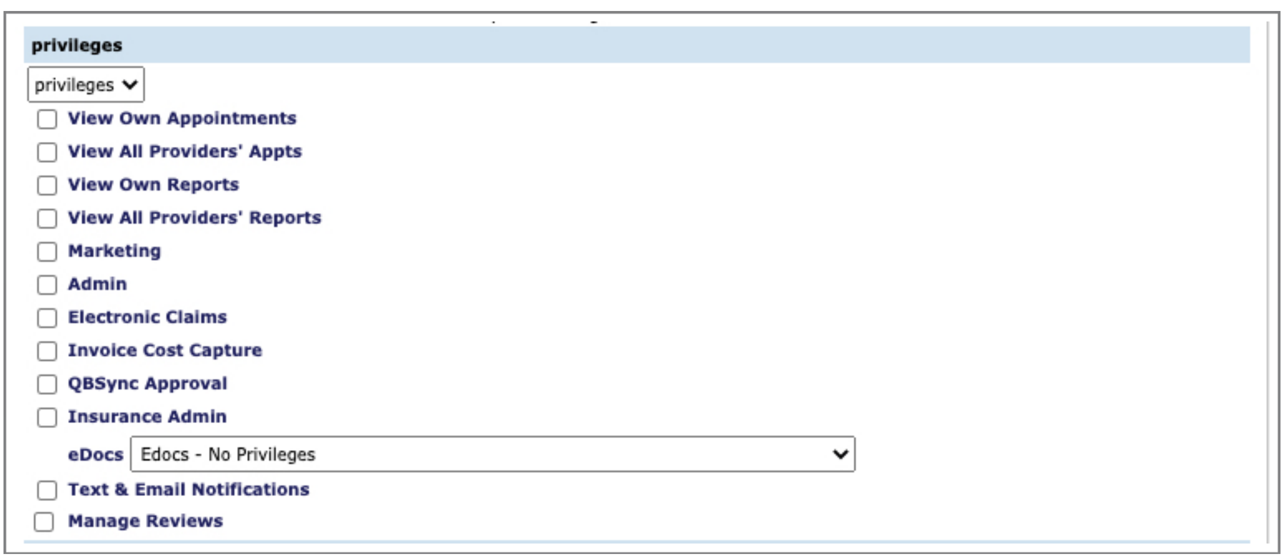
Default to global search: If you have multiple clinics, selecting global search will search all clinics for a patient record, not just the clinic that is open on your screen.

STAFF PRIVILEGES:

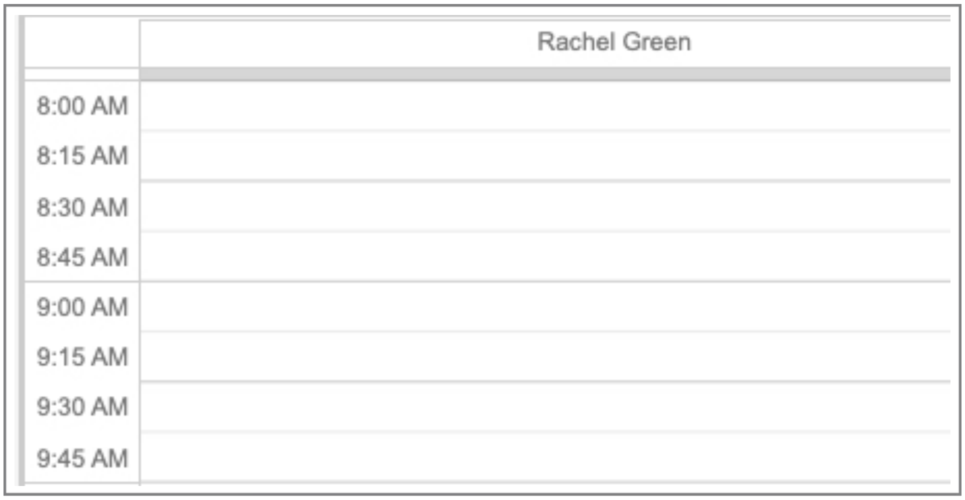
A unique staff page is created for each employee within the Administration section of Sycle. Preferences and privileges for that staff member are assigned by the clinic owner and/or administrator.

Place a checkmark beside each privilege to be assigned to a staff member. When a staff member logs into Sycle with their unique user name and password, the assigned privileges determine the scope of access and functions that staff member has in Sycle. A description of each privilege is below.

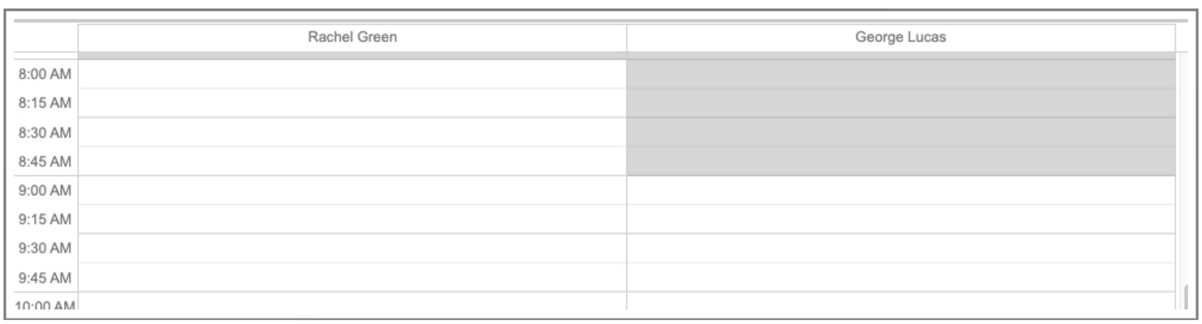
Note: Be sure to double check Privileges section before closing page to make sure all desired boxes remain checked.



View Own Appointments: Allows the staff member to view their own appointment schedule. In the view below, when Rachel Green logs into Sycle, she would be able to see her own appointment schedule.



View All Providers' Appointments: Allows the staff member to view the entire appointment schedule for all providers. In the view below, when Rachel Green logs into Sycle, she would be able to see her own appointment schedule as well as all other providers.



View Own Reports: Allows the staff member to view only their own report data. Each Sycle report contains appropriate sort and view parameters. Reports will only display statistics that are related to them.

View All Providers' Reports: Allows the staff member to view report statistics for all providers. Each Sycle report contains appropriate sort and view parameters. Report statistics for all providers may be viewed by the staff member.

View Gross Margin Report: Allows the staff member to view the Gross Margin Report containing cost of goods, net price and gross margin statistics for each hearing aid sale.

Marketing: Allows the staff member to view Marketing reports. Marketing reports contain patient personal health information, hearing instrument and warranty date information, referral source statistics, custom patient groups, etc.

The view below shows Marketing Report categories. Within each category, a variety of report options, views and sort parameters are available.

Admin (Administration): Allows the staff member access to the Administration section of Sycle. This area contains sensitive corporate information, employee personal information, Sycle passwords, cost of goods and prices, clinic specifications and preferences, etc.

Hours: The hours this staff member is normally in the office. When looking at the scheduling page, the clinic hours are dark shading and provider hours are light shading.

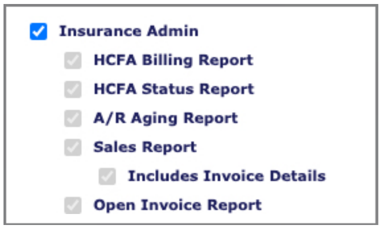
NOAH Admin: Allows the staff member to the administration rights to NOAH sync.

Electronic Claims: Allows the staff member to send in HCFA forms for insurance companies.

Invoice Cost Capture: Will allow the actual cost of goods to be captured into Inventory, then would be calculated into the Gross Margin Report.

QBSync Approval: Will allow the staff member to approve Sycle sync to QuickBooks.

Insurance Admin: Select specific admin rights to insurance reports.



eDocs: From the drop down menu, you can select certain privileges for the staff member regarding documents.

Advanced schedule rules: Two types of block scheduling are available to assist with scheduling needs. However, if advanced scheduling rules are needed, contact Sycle's technical support team for assistance 888-881-7925.

DELETING STAFF MEMBERS

If the staff member has **NOT** had a column on the scheduling calendar:

1. Open the staff member page in Administration.
2. Change their password.
3. Uncheck all privileges.
4. Save.
5. Re-open their staff page.
6. Click **delete staff member**.

If the staff member has had a column on the scheduling calendar, use the steps below to preserve historical information on the scheduling calendar:

1. Make sure any future appointments for the staff member being deleted are rescheduled or cancelled.
2. Open the staff member page in Administration.
3. Change their password.
4. Uncheck all privileges.
5. Save.
6. Re-open their staff page. **Choose either Step 7 or Step 8 to complete the process.**
7. If the staff member has **advanced schedule rules** in place, you will create a new rule:
    - Click **advanced schedule rules**.
    - Click **add new rule**.
    - For New Schedule Settings, select **out of office**.
    - Select the start date (the first day they will be out of the office).
    - Select the end date (use the farthest date available on the drop-down menu).
    - Click **ok**.
    - Under each day of the week for all clinics listed, select **every**.
    - Select **will** override existing schedule settings for this date range.
    - **Save** & Close.
8. If the staff member does **NOT** have any **advanced schedule rules** in place, you will create two new rules:

    Rule 1:
    - Click **advanced schedule rules**.
    - Click **add new rule**.
    - For New Schedule Settings, select **in the office**.
    - Select the start date (use the earliest date available on the drop down menu).
    - Select the end date (use the last day they will be in the office).
    - Click **ok**.
    - Under each day of the week for all clinics listed, select **every**.
    - **Save** & Close

Rule 2:

- Click **advanced schedule rules**.
- Click **add new rule**.
- For New Schedule Settings, select **out of office**.
- Select the start date (the first day they will be out of the office).
- Select the end date (use the farthest date available on the drop-down menu).
- Click **ok**.
- Under each day of the week for all clinics listed, select **every**.
- **Save** & Close

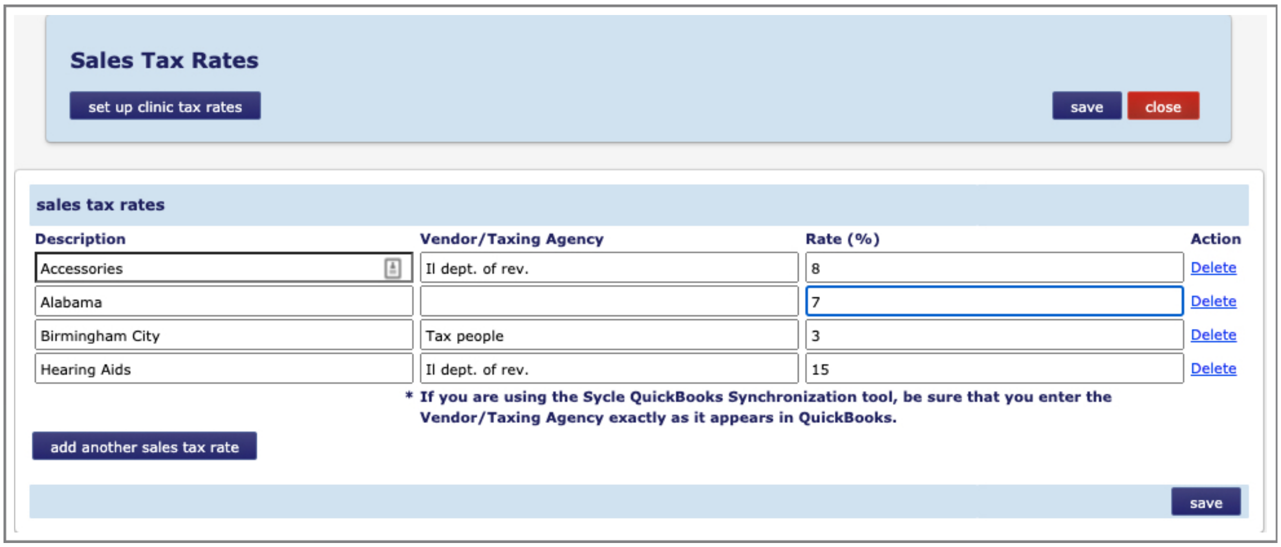
When there is no longer a need to reference the staff member's historical schedule, you can delete the staff member by opening their staff member page in Administration and clicking **delete staff member**.

TAXES

Sales Tax Rates: In the shaded section on the left side of the **Administration** home page, select **Sales Tax Rates**.

Step One: Enter the various sales tax rates for the company.

- Click on **add another sales tax rate** to open a pop up screen for adding taxes.
- **Description:** Enter a description of the tax (a name that will describe that tax in Sycle).
- **Vendor/Taxing Agency:** Enter the taxing agency (eg: “Jefferson City Sales Tax”).
- **Rate (%):** Enter tax rate percentage (eg: “7.25”).
- **Save**.



Step Two: Set up individual clinic tax rates.

- Clinic: Select the clinic using the drop-down box.
- **Choose the tax rates that should be available to this clinic:** Check taxes applicable to this clinic.
- **Save**.
- Repeat for each clinic within the company.

Note: When setting up the products sections, you will be able to connect the product with the appropriate taxes. Sycle automatically includes taxes on designated taxable products when creating invoices.

PURCHASES SECTION

Purchases: In this section, you will set up the products and services used by your clinic(s). The time and detail you invest when setting up this section will help create an easier transition to using Sycle on a daily basis.

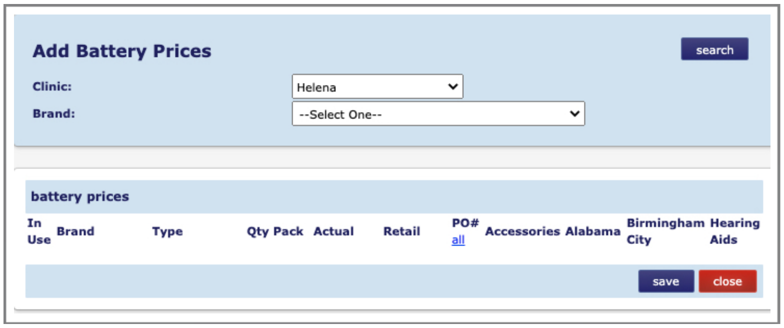
*Note: Anytime you see a **Download** button in Sycle, you are able to download that section onto a spreadsheet.*

Accessory Types:

- Using the drop-down box, select the **main clinic**.
- Click **add another type**.
- Enter the name/description of accessory type, the retail sales price and tax rate if applicable.
- **Save**.
- Repeat above steps to add all accessory types.
- Once all accessory types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the clinic(s) desired and click **copy**.

Battery Prices:

- Using the drop-down box, select the **main clinic**.
- Click **Add/Edit** to open **Add Battery Prices screen**.



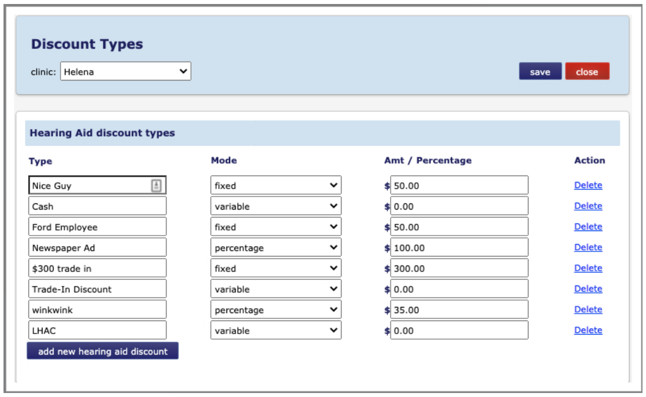
- Using the drop down boxes, choose the Clinic and Brand of batteries that you sell.
- Click **search** to open the list of options for that **Brand**. Note there are different size and quantity options.
- Click in the square to the left of each battery option you use.
- Enter the **actual** cost of goods, the **retail** sales price and, if applicable, click in the square on the right to add the appropriate **sales tax**.
- **Save**.
- Repeat above steps to add all battery types.
- Once all battery types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the clinic(s) desired and click **copy**. You can also customize Battery types for each individual clinic by selecting the clinic desired and entering Battery types for that clinic.
- To set tax rates, click **Set Tax for All** and select the applicable sales tax rate(s).

- When battery section is complete, click **close**.

*Note: Discounts on battery prices (e.g.: cartons or battery club prices) can be set up in the "**Discount Types**" section of Purchases in Administration.*

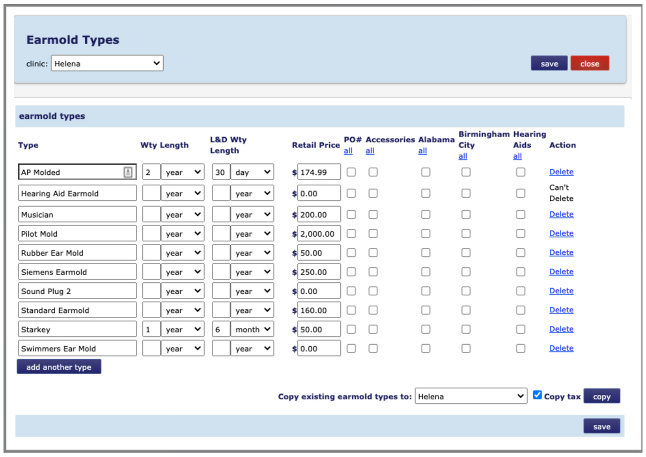
Discount Types:

Note: This section is more easily completed after finishing the other Purchase type sections.



- Using the drop-down box, select the **main clinic**.
- There are several product and service categories available. Scroll down and select a discount category.
- Click add **new__discount** under the desired category.
- Enter Discount Type (description of discount).
- Enter Mode (choose fixed, percent or variable).
- Enter Dollar Amount or Percentage of discount.
- **Save**.
- Once all Discount types have been entered, they can be copied to any or all clinics. Using the drop-down box at the bottom of the **Discount type section**, select the clinic(s) desired and click **copy**. You can also customize Discount types for each individual clinic by selecting the clinic desired and entering Discount types for that clinic.
- **Save** and **close**.

Earmold Types:



- Using the drop-down box, select the **main clinic**.
- Click **Add/Edit** to open Earmold Type screen.
- Enter Earmold description, the retail sales price and, if applicable, check **appropriate tax rate(s)**.
- **Save**.
- Repeat above steps to add all Earmold types.
- Once all Earmold types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the clinic(s) desired and click **copy**. You can also customize Earmold types for each individual clinic by selecting the clinic desired and entering Earmold types for that clinic.
- **Save** and **close**.

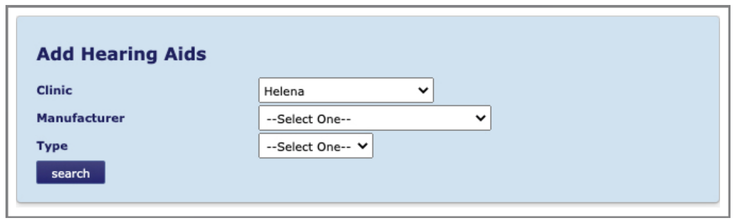
Hearing Aid Prices and Warranty Lengths:

- Using the drop down box, select the **main clinic**.

Note: If all of your clinics use the same make/models of aids, choose main clinic. Once the main clinic is set up, you can copy to all other clinics. If your clinics use different make/models, you will enter hearing aids for each separate clinic.

If the replacement deductible amount is the same for all aids, enter that amount in the default replacement deductible field. To customize a deductible amount for only the clinic in which you are working, click save deductible. To use the same deductible amount in all clinics, click save deductible to all clinics.

If you have the same tax rate(s) for all aids in all clinics, click the Set Tax for All button to select the appropriate tax for all hearing aids. If you have different tax rates(s) for different clinics, select the tax rate(s) for hearing aids when you create the product list for each clinic.



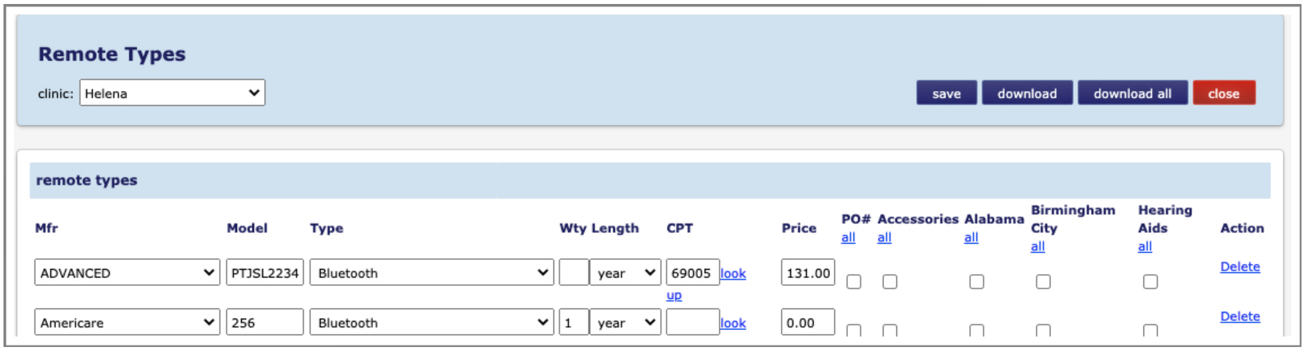
- Click **Add/Edit** to open **Add Hearing Aids** screen.
- Using the drop-down boxes, select **Clinic, Manufacturer and Type** of hearing aid.
- Click search to open the list of options for that manufacturer and type.
- Scroll down the list. When you come to a model that you use in your clinic, click in the square to the left of the model. The check mark indicates that you use this model.
- Enter the actual cost, the retail sales price, warranty length and battery information to the right of each hearing aid.

Note: If you leave the actual cost and/or retail price sections at $0.00, they must be manually entered when creating invoices and receiving inventory.

- Select appropriate tax rates if you have different tax rates for different clinics. If all clinics use the same tax rate, you can use the Set Tax for All button on the main screen (as described above).
- Once you have selected all the models you use in this category click **save**.
- Repeat above steps to add all hearing aid types.
- To copy the price and warranty length information to other clinics use the copy prices and warranty length section at the bottom of the page.
- To copy tax rates to other clinics, choose the **clinic**, check the box by **Copy tax** and click **copy**.
- When finished with this section, click **close**.

Remote Types:

- Using the drop-down box, select the **main clinic**.
- Click add **new remote type**.



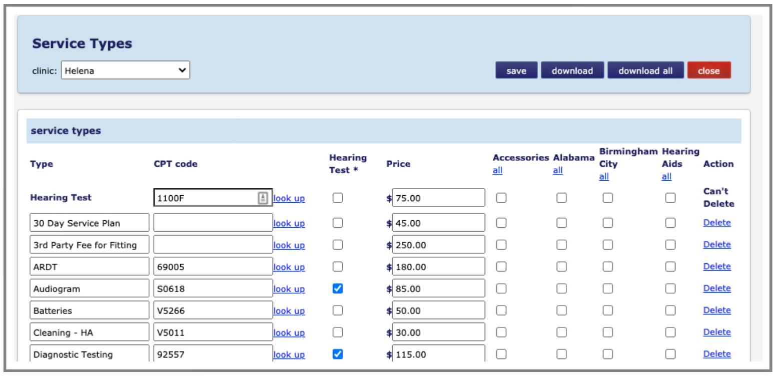
- Select **Manufacturer** using the drop-down box.
- Enter description in **Model field**.
- Select remote **Type** using the drop-down box.
- Enter Warranty length information.
- Enter CPT code if using Sycle for hcfa insurance billing.
- Check appropriate sales tax if applicable.
- Enter the retail sales price.
- **Save**.
- Repeat above steps to add all Remote types.
- Once all Remote types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the **clinic(s) desired** and click **copy**. You can also customize Remote types for each individual clinic by selecting the clinic desired and entering Remote types for that clinic.
- **Save** and **close**.

Repair Types:

- Using the drop-down box, select the **main clinic**.
- Click **Add/Edit** to open **Repair Type** screen.
- Enter Repair description, the retail sales price and, if applicable, check appropriate tax rate(s).
- **Save**.
- Repeat above steps to add all Repair types.
- Once all Repair types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the **clinic(s) desired** and click **copy**. You can also customize Repair types for each individual clinic by selecting the clinic desired and entering Repair types for that clinic.
- **Save** and **close**.

Service Types:

- Using the drop-down box, select the **main clinic**.
- Click **Add/Edit** to open **Add Service Type** screen.

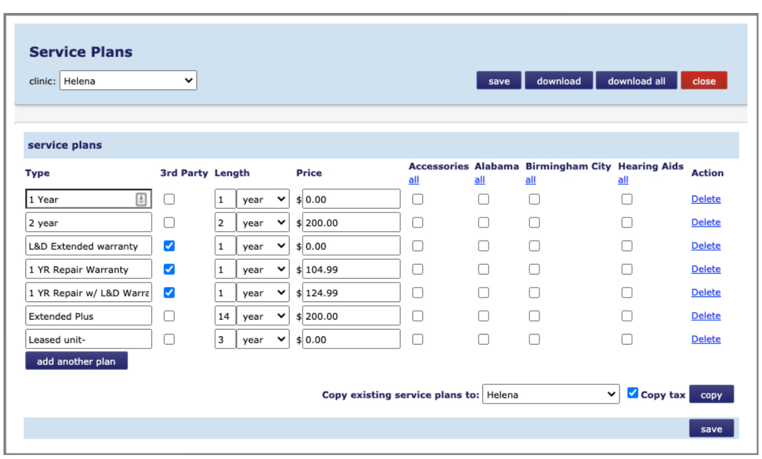


- Enter Service description, CPT code for insurance billing, the retail sales price and, if applicable, check appropriate tax.
- **Save**.
- Repeat above steps to add all Service types.
- Once all Service types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the **clinic(s) desired** and click **copy**. You can also customize Service types for each individual clinic by selecting the clinic desired and entering Service types for that clinic.
- **Save** and **close**.

Note: If you would like Hearing Test revenue recorded separate from other Services under Sales Reporting, place a check in the box under the Hearing Test column.

Warranty / Service Plans:

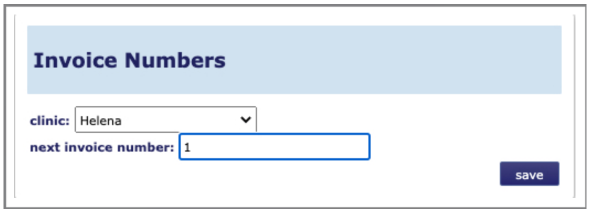
- Using the drop-down box, select the **main clinic**.
- Click **Add/Edit** to open **Service Plans** screen.



- Enter Service Type description, click the box under 3rd Party if the plan is with a company other than the original manufacturer, enter Length of warranty, retail sales Price and, if applicable, check appropriate tax rate(s).
- **Save**.
- Repeat above steps to add all Warranty / Service Plan types.
- Once all Warranty / Service Plan types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the **clinic(s) desired** and click **copy**. You can also customize Warranty / Service Plan types for each individual clinic by selecting the clinic desired and entering Warranty / Service Plan types for that clinic.
- **Save** and **close**.

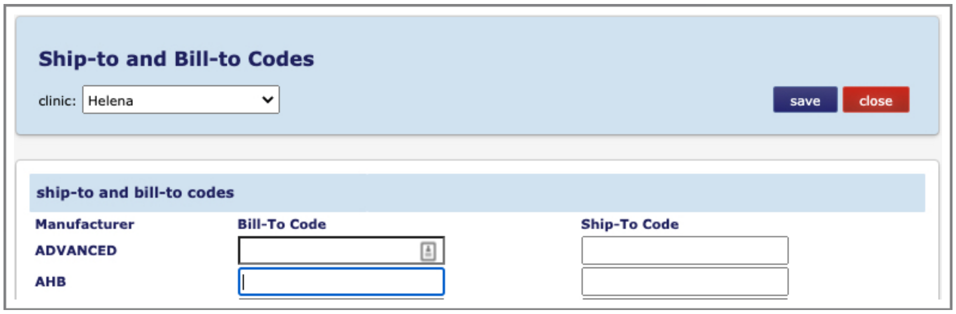
Invoice Numbers:

- Using the drop-down menu, select the **clinic**.
- Enter the starting invoice number you would like to use.
- **Save** and **close**.



Account Numbers:

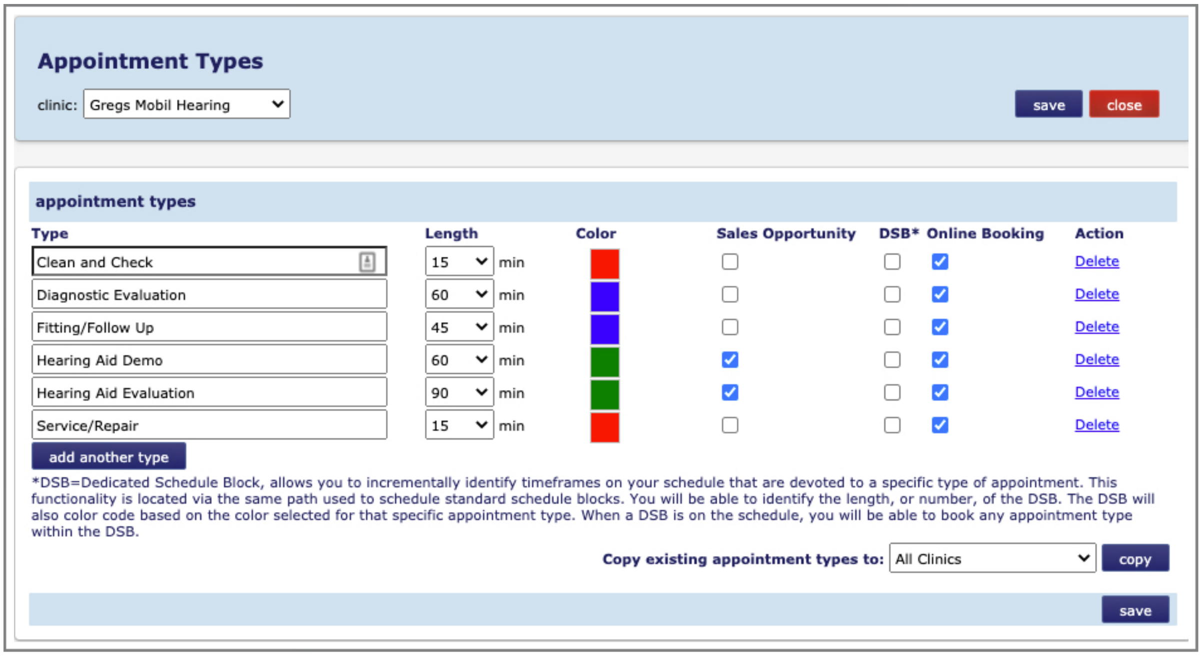
- Using the drop-down box, select the **clinic**.
- Scroll down through the list of Manufacturers to find each one you work with.
- Enter the **Bill To account number** and **Ship To account number** for the Clinic you have selected.
- Repeat the above steps for all of your clinics.
- These account numbers will automatically populate when you create Order and Repair forms in Sycle.
- **Save** and **Close**.



SCHEDULING SECTION

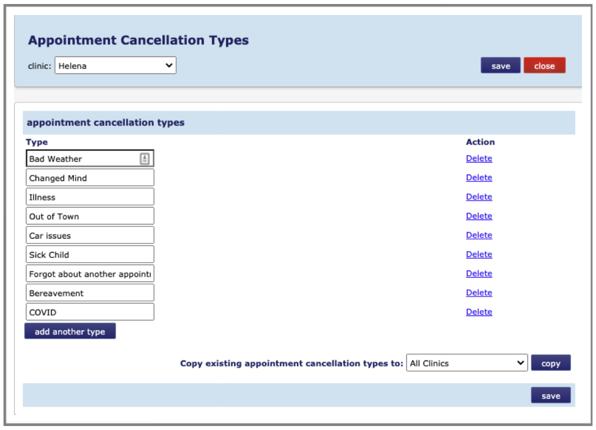
Appointment Types:

• Using the drop-down box, select the **main clinic**.
• Click **add another type**.



• Enter **Appointment Type** description. Customize descriptions to match your clinic.
• Enter the **average length of time** for that type of appointment.
• Choose a color for that appointment type. Click on the **color block** to open color options. Click on the **color preferred** for that appointment type.
• Click in the box under Sales Opportunity if this appointment type provides an opportunity for providers to sell hearing instruments.
• Click in the box under DSB if this appointment type is one that might be used to create a Dedicated Schedule Block. A description of Dedicated Schedule Blocks is available under the list of appointment types.
• After entering all appointment types, **save**.
• Repeat above steps to add all **Appointment types**.
• Once all Appointment types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the **clinic(s) desired** and click **copy**. You can also customize Appointment types for each individual clinic by selecting the clinic desired and entering Appointment types for that clinic.
• **Save** and **close**.

Appointment Cancellation Types:



- Using the drop-down box, select the **main clinic**.
- Click **add another type**.
- Enter **Appointment Cancellation Type description**.
- After entering all cancellation types, **save**.
- Once all Cancellation types have been entered, they can be copied to any or all clinics. Using the drop-down box, select the clinic(s) desired and click **copy**. You can also customize Cancellation types for each individual clinic by selecting the **clinic desired** and entering Cancellation types for that clinic.
- **Save** and **close**.

Provider Preference:

- If there are multiple providers, Sycle can automatically generate a warning if an appointment is being scheduled with a provider other than the original provider that serviced the patient.
- Select **Yes** to have this warning to appear or **No** if you prefer no warning.
- **Save** and **Close**.

Appointment Outcome Preferences:

- These preferences relate to the Enter Outcome section when completing an appointment.
- Purchase Prompt: choose the default setting preferred on the Enter Outcome page.
  1. Selecting **Yes** will automatically open the Purchase Summary page when the Outcome page is closed.
  2. Selecting **No** will close the Outcome page.
- Did Not Test, Top of List:
  1. Selecting **Yes** places Did Not Test at the top of the drop-down menu for Hearing Test results.
  2. Selecting **No** leaves Did Not Test at the bottom of the drop-down menu for Hearing Test results.
- Always Preselect Did Not Test:
  1. Selecting **Yes** will automatically default to Did Not Test.
  2. Selecting **No** will require manually entering the Hearing Test results.

Referral Sources:

Note: Referral Sources are used by <u>all clinics</u> in the parent company. Referral Subcategories can be customized for individual clinics. Referral tracking reports are available within the Report section of Sycle.

- Place a **check** beside the referral sources that you use by clicking in the box.
- Add additional referral sources by clicking **add another source**.
- Enter a **description** of the new referral source.
- Place a **check** beside the new referral source by clicking in the box.
- **Save** and **Close**.

Referral Subcategories:

Notes: Referral Subcategories allow you to track lead sources in greater detail. For example, you may advertise in more than one newspaper in your area or you may do several direct mail campaigns within a year.

If you have multiple clinics, you can create Referral Subcategories for each clinic in the parent company.

Referral Sources and Referral Subcategories are selected when scheduling an appointment. When a referral source is selected for a new patient, that referral source becomes the automatic default for that patient each time a new appointment is scheduled within the first 90 days. When scheduling appointments after the first 90 days, Sycle will not automatically default to the original referral source. The original Referral Source does remain constant in the Patient Summary page.

The process for creating Subcategories for Referral Sources is listed below. There are additional notes below about different Referral Subcategories.

- Using the drop-down menu, select the **clinic** you wish to work with.
- Using the drop-down menu, select the **referral source** for which you are creating subcategories.
- Click **add another subcategory**.
- Enter the **Subcategory description** and **save**.
- Repeat to add additional Subcategories.
- Once all Subcategories have been entered, they can be copied to any or all clinics. Using the drop-down box, select the **clinic(s) desired** and **click copy**. You can also customize Subcategories for each individual clinic by selecting the clinic desired and entering Subcategories for that clinic.
- **Save** and **Close**.

Current Patient Referral: There are generally no subcategories for this type. When Patient Referral is selected, a **Description** field opens (located under Subcategory field) so the name of the referring person can be noted.

Direct Mail: A new Subcategory can be created for each Direct Mail campaign (eg: “Jan. 2014”). Each clinic in the parent company can have its own Subcategories.

This same concept applies to other Referral Sources that are event specific such as Lunch ‘N Learn or other engagement opportunities. A Subcategory can be created for each campaign or engagement.

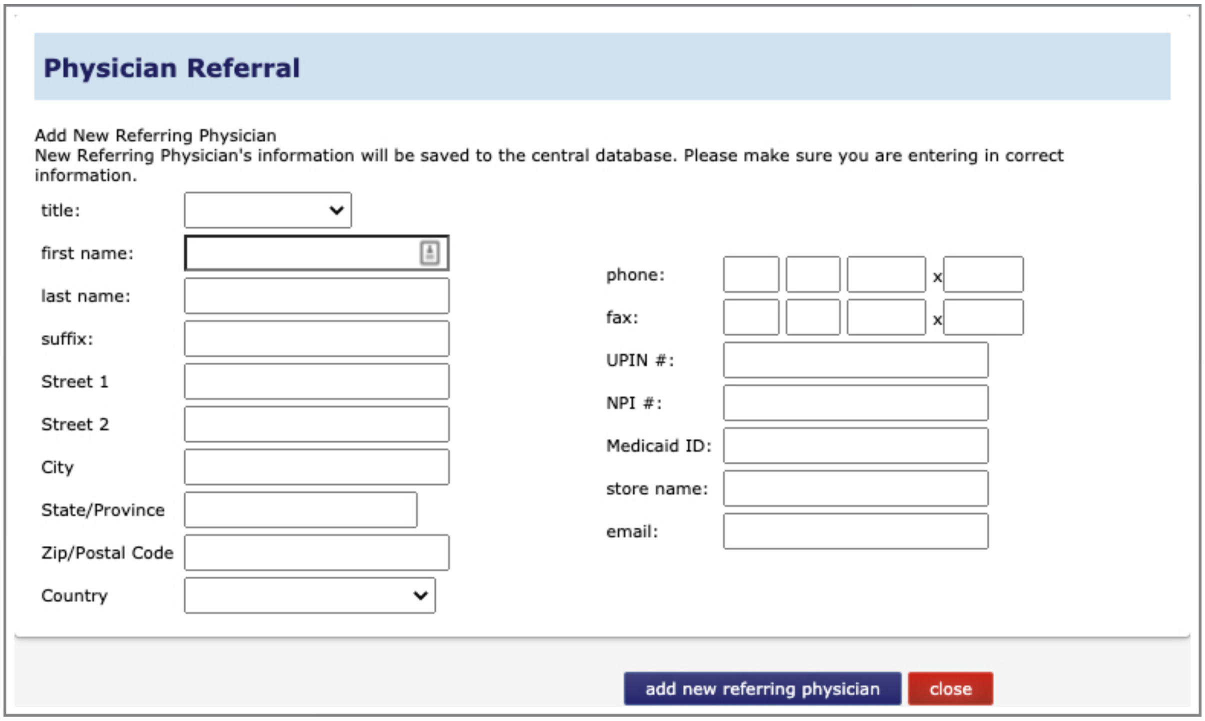
Magazine & Newspaper: A new Subcategory can be created for each publication in your area. Cities often have more than one newspaper. An example when scheduling a patient would be:

1. Referral Source: Newspaper
2. Subcategory: Kansas City Times
3. If desired, additional information can be entered in the Description field. (Eg: the date the ad ran)

Physician Referral: A list of Referring Physicians can be created in the Administration section of Sycle. This list is then available when selecting Physician Referral for a new appointment.

If Physician Referral is selected when scheduling a new appointment, a pop up screen opens. There is a drop-down menu on the top left corner that displays the list of all Referring Physicians in your database. Select the **referring physician**. Click **submit** and **close**.

There is also a blank template available on the pop up screen to add a **New Referring Physician** the clinic database.



CONTACTS

Custom Patient Groups:

Up to 24 Custom Patient Groups per company can be created. These groups are used by **all clinics** in the parent company.

A patient many be assigned to several groups. A report can be generated of all patients in a Group. Some examples include civic organizations, third party vendors (like EPIC), retirement centers, Medicare patient, language, battery club, etc.

Custom Patient Groups can be selected for a patient on the Appointment Outcome page or on the Patient Summary page. Simply place a check in the box beside the **Custom Group**. Uncheck the box to remove a patient from a Custom Group.

To add Custom Patient Groups:

- Click **add another type**.
- Enter the name of the new **Custom Group**.
- Click **save** and **close**.
- Repeat this process for each **Custom Group**.
- When finished, click **save** and **close**.

Database Backup:

To create a Patient Backup Download:

- Select **Clinic** using the drop-down menu.
- Place a **check** beside each field to include in the backup.
- Click **download button**.

To create an Appointment Backup:

- Click **appointment backup**.
- Select **Clinic** using the drop-down menu.
- Enter **Date Range** parameters desired.
- Place a check beside each field to include in the backup.
- Click **download button**.

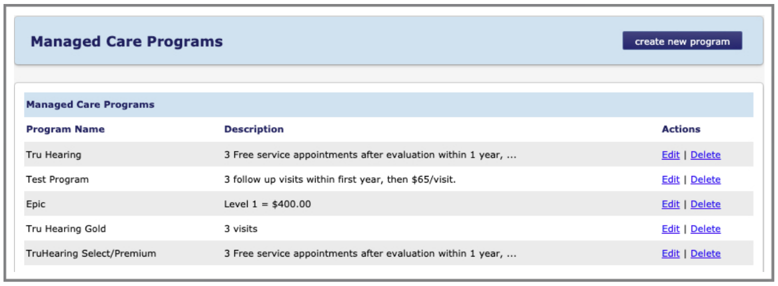
Do Not Call:

This utility updates patient and purchase contact records against a do-not-call-list. Specific instructions are given when opening this section. For further information, contact Sycle technical support at 888-881-7925.

Managed Care:

Create programs for the various managed care services that you are in network with.
To add a new program:

- Select **create new program**.
- Enter **Program Name**: i.e. TruHearing Select.
- Enter **Description**: i.e. Three Year Warranty, 60 Free Batteries, etc.
- Click **Save**.



Managed Care Programs

create new program

Managed Care Programs

Program Name	Description	Actions
Tru Hearing	3 Free service appointments after evaluation within 1 year, ...	Edit | Delete
Test Program	3 follow up visits within first year, then $65/visit.	Edit | Delete
Epic	Level 1 = $400.00	Edit | Delete
Tru Hearing Gold	3 visits	Edit | Delete
TruHearing Select/Premium	3 Free service appointments after evaluation within 1 year, ...	Edit | Delete

Data Control:

Create different levels of requirements for demographic entry on the Patient Summary section.

Appointment Settings:

Removes the ability to delete appointments from all users without Admin privileges on the Appointment Summary.

Purchase Settings:

Remove the ability to return an item prior to delivery.

Product Settings:

Remove the ability to modify the base price for hearing aids.