sycle

The #1 Hearing Care Practice Management Solution

Sycle Private Practice
Training User Guide

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WELCOME TO SYCLE

Sycle is a full practice management suite. It is both powerful and easy to use. A clinic can create, track and organize patient records and scheduling. The ability to manage inventory, sales and receivables as well as generating invoices and marketing reports is built right into the software. Sycle is perfect for paperless environments or in tandem with traditional office systems.

Our insurance team provides support and services including credentialing, billing, electronic filing and claim tracking.

We partner with NOAH, QuickBooks and LACE. Sycle is easily synced with these products to enhance your clinic productivity. For information, contact our Customer Experience Team at 888-881-7925.

SYCLE RESOURCES

A Sycle Practice Clinic is available for anyone to use while learning the software. Call 888-881-7925 for the current password.

Sycle Customer Experience Team: **888-881-7925** 8:00am – 7:00pm CST

Group and Custom Training Sessions: **888-881-7925**, ask for Training Team

GETTING STARTED WITH SYCLE

TO ENTER THE SYCLE WEBSITE:
1. Enter into your browser: https://www.sycle.net
2. Enter your Username and Password

MAKE SURE POP UP BLOCKERS ARE TURNED OFF TO ACCURATELY VIEW ALL SYCLE FUNCTIONS

OVERVIEW OF HOME PAGE

TOP SECTION OF THE HOMEPAGE:

Links on the upper right corner:

Need Help: User Guides and customer workflow walk-throughs

Videos: View Sycle's video training library.

Support: Contact Sycle's Customer Experience Team for support and training.

Sign Out: Log out of Sycle website.

Four gray tabs across the top of Home Page:

Appointments: All functions related to patient data, scheduling and inventory.

Reports: Reporting functions.

Marketing: Marketing functions.

Administration: Administrative parameters for your company / clinic.

PATIENT SEARCH BOX ON LEFT SIDE OF THE HOME PAGE:
A quick patient search function.
- Enter all or part of the **Patient Name**. Click **GO** to view a list of matching names within your database.
- Click on the **Patient's Name** to open their **Patient Summary** screen.
- Click **Appt** to open the calendar and schedule an appointment.
- Click **Purchase** or **Repair** to open the **Purchase Summary** screen.
- Click **Notes** to log any notes onto their **Patient Summary** page.
- Click **Callback** to schedule a future callback date for this patient.
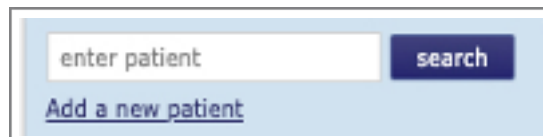
HOME PAGE CALENDAR:
- Click on the date to view the schedule for that day.
- Use the drop-down boxes to change the Month / Year.
- << Opens the previous Month >> Opens the following Month
- View options for schedule:
  - ○ Today: click to view today's schedule
  - ○ Week at a glance: click to view the entire week
  - ○ Month at a glance: click to view the entire month

PRINTABLE SCHEDULE:
- Click on the date to view the schedule for that day.
- Using the drop-down box, select the **Provider** or **All Providers**. Click **Print**.
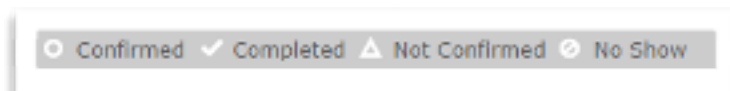
SYCLE NEW CALENDAR

New Calendar View:

The New Calendar has a color header to match the Appointment Type. Colors already assigned to Appointment types in the Classic version will not change if updating to the New Calendar. The header includes the initials of the provider with whom the appointment is scheduled, the patient name and the appointment status symbol. Providers are assigned a pastel background color for their appointments.

Appointment Status symbols:

New Calendar View:

New Calendar: Assigning a pastel color background for a provider.
- Open the **Administration** section of Sycle.
- Open the Provider's staff page.
- The **Schedule Color** field is in the upper right corner, above the user name and password.
- Click inside the color square to see a color wheel. Click on the desired color.
- Save and Close page.

Dedicated Schedule Blocks (DSB):

Dedicated Schedule Blocks are provider specific and will automatically appear on the Day view of the Calendar. When using M-F or Week screens, select a specific provider's calendar to view.

DSB New Calendar view:

New Calendar: Concurrent Appointments with the same provider.

A company may request a default setting of up to three concurrent appointments per provider for each 15-minute time slot. Contact customer support at 888-881-7925.

Note: Once the default setting is changed in Sycle, you cannot change from the New Calendar version back to the Classic.

New Calendar: Drag & Drop Feature for rescheduling.

Adjusting length of appointment time: The length of time for an appointment can be changed from within in the Appointment Summary screen or directly from the calendar by using a mouse. To change directly from the calendar, left click and hold the mouse on the bottom of the pastel section, drag the cursor up or down to shorten or lengthen appointment time.

New Calendar Rescheduling an Appointment time for the same day:

To reschedule an Appointment time on the same day, grab the appointment by left clicking on the colored header and holding down the mouse button while you "drag" the appointment to the new time slot. Once the appointment is lined up with the new start time, release the mouse button. When rescheduling on the same calendar day, the appointment may be changed to a different provider. The background color will change as the provider is changed.

New Calendar Rescheduling an Appointment time for a different day within the same week:

If rescheduling to a different day within the same week, change the calendar view to M-F or Week. Grab the appointment by left clicking on the color header and holding down the left mouse button while you drag the appointment to the new day and time slot. Once the appointment is line up with the new start time, release the mouse button. The appointment will stay attached to the same provider.

New Calendar Changing an Appointment to a different provider:

The Today view must be used when changing an appointment to a different provider. When on the M-F or Week view, all drag & drop appointments remain attached to the original provider.

Note: New Calendar drag & drop features are only available on Today, M-F and Week views.
New Calendar drag & drop features are not available on appointments with a "completed" status.

VIEW CALENDAR BY DAY, WEEK OR MONTH:

Select the view by clicking the desired button under small monthly calendar.

NEW CALENDAR VIEWS:

Example of New Calendar Today view:

Example of New Calendar M-F view:

PATIENT RECORDS

The **Patient Summary** page in Sycle contains the patient's health information (PHI) including their personal data, insurance, appointment/chart history, hearing test results, equipment and purchase/service records. There are two sections for keeping notes regarding this patient - one is a chronological log of administrative notes and the other section is a chronological log of appointments and outcome notes which form the patient's medical history with your clinic.

Because the **Patient Summary** page creates a medical chart history for the patient, it should be professionally, legally and ethically compliant with national, state and HIPAA guidelines. A patient's health information (PHI) is to be treated with extreme care and anyone working with PHI should receive training from their clinic regarding HIPAA guidelines for protecting PHI.

The detail and accuracy of information within a Patient Summary page directly affects the efficiency of all other functions within Sycle.

Tip: If punctuation is eliminated when entering patient information into the Patient Summary, the HCFA form available within Sycle will auto populate as required.

*View of top portion of blank **Patient Summary** page.*

PATIENT SUMMARY PAGE IN DETAIL

Each section of the **Patient Summary** page is divided by a colored bar for easy reference. Below is a summary of each section.

Once a **Patient Summary** page has been created for a patient, additional sections become available to record future information such as purchase/invoices, repairs, HFCA forms, etc.

Identity:
● As you enter a patient's health information, it is recommended you follow US Postal service guidelines and eliminate punctuation. By doing so, if a HCFA form is created for the patient using Sycle, the HCFA form will auto-populate correctly.
● The Preferred Name field can be used to indicate a nickname or name preference. This field can also be used for in-house purposes as a special designation (e.g.: pediatric patient). The Preferred Name does not appear on an appointment. It does appear in various Reports.
● The Patient Type field provides a drop-down box with three options. Edit accordingly as the patient status changes.
> Prospect: a new patient to your clinic, a patient that does not wear hearing instruments.
> Current: a patient that is wearing hearing instruments purchased from your clinic.
> Competitive: a patient that is wearing hearing instruments purchased elsewhere.
● Place a check in the corresponding box if the patient is an Insurance patient, Speech Pathology patient or Tinnitus patient.

Original referral source:
● How did this patient hear about the clinic? Newspaper, direct mail, patient referral, walk-in, etc.
● Select the source from the drop-down box (e.g. newspaper).
● Select the sub-category from the drop-down box (e.g. New York Times).
● If patient is a referral, enter the referring person's name in field.

Clinic and provider:
● The clinic where the patient is being seen.
● The provider the patient generally sees.

Employment and student status: enter information

Marital status: enter information

Snowbird address: (if patient spends part of the year in a different location)

Privacy:
- Did patient sign a HIPAA waiver?
- Is it OK to send this patient mail?
- Is it OK to call this patient?

Emergency contact: (generally a family member or caretaker)

Responsible party: (financial responsibility if other than patient)

Background:
- Previous provider: enter information if patient was previously seen at a different hearing care office.
- Primary Physician: enter information
- Referring Physician: enter information

Notes:
- This note section is for in-house/administrative notes about the patient. It creates a record log and is a great way to communicate information internally. (There is a different note section called "Outcome Notes" on the Appointment Summary page for entering patient treatment/chart information.)

- Insurance: (information for up to four policies can be included)

Hearing loss:
- Results of audiometric testing. Most audiologists and hearing instrument specialists enter this information themselves.

Current equipment:
- Any equipment that has been purchased from your clinic. If a purchase is done through Sycle, the purchase will be automatically placed in this section.

Other equipment: After a **Patient Summary** is created, this additional section becomes available.
- Here you would enter hearing aid equipment that the patient purchased previously from a different company. If a purchase date is unknown it will default to 1999.
- When patients purchase new hearing aids from your clinic, their older aids automatically populate this section.

Custom groups:
- Your company can create 24 different custom groups as desired and connect patients to these groups. A report by group can be run for tracking and/or marketing purposes.
- Some examples of custom groups: several patients may be residents of a care center, a battery club, civic organizations, managed care/third party patients, pediatric patients, veterans, etc.

SEARCH METHODS

SEARCH FOR A PATIENT:
There are two ways to access a **Patient Summary** from the **Home Page**. See sections below for a detailed description of each.

    1. Enter patient name in the search box under the calendar. Click **search**. Click on the patient name from the **Search Results** screen.

    2. Click on the adv search button in the upper portion of **Home Page** to open the advanced search page. Enter first or last name of patient. Sycle will provide a list of patients with matching data. Click on the patient name.

MISC. SEARCH OPTIONS USING PATIENT SEARCH FIELD:
(located in top right corner of **Home Page**)

- **Referring Physician search:**
  Type into search field: DR:first or last name of physician (no spaces). Click GO. (Eg: DR:Franklin)

- **Invoice search:** (brings up Patient Summary with that invoice number) Type into search field: INV(space)Invoice number. Click **GO**. Eg: NV 579

- **Serial Number:** (brings up Patient Summary that contains that serial number) Type serial number into search field. Click **GO**.
  Note: If the search fails, delete the last digit of serial number and try again.

- **Sycle Patient ID Number:** (brings up Patient Summary containing that unique, Sycle generated identifier) Type into search field: the patient's Sycle identification number. Click **GO**.
  Note: If you type in the number 1, Sycle brings up a numerical list of all patient ID numbers beginning with the number one. The same follows with any sequence of ID numbers.

ADDITIONAL SEARCH FEATURES AVAILABLE FROM HOME PAGE:

- • show clinic: Select the desired clinic using the drop-down box.
- • show providers: Select the provider whose schedule you wish to view using the drop-down box.
- • find appointment type: Select the appointment type you wish to search for using the drop-down box. Click **find next** and Sycle will show you upcoming appointment times available for that appointment type.
- • appointment length: Select the length of appointment time desired. Click **find next** and Sycle will show you upcoming appointment openings for that length of time.

THE SEARCH RESULTS PAGE IN DETAIL:

- • To view an alphabetical list of all patients in the clinic database, click search.
- • To find an individual patient, enter the patient name or portion of name into the search box.

    Click search to look in a single clinic database.
    Click search all clinics to look in all clinic locations.

- • Click either Quick Add or Add a new patient to create a new patient file.

- • Other available search options:

    archive search   will search the archived patient files database.
    advanced search   opens an advanced search screen. See below for more about advanced searches.
    patient name   opens the Patient Summary page.

- • To the right of the patient name, click on any function you want to complete for that patient:

    appt   Click to open the scheduling calendar.
    purchase   Click to create a new Purchase / Invoice.
    repair   Click to create a Repair / Invoice.
    notes   Click to enter inner-office Notes regarding this patient.
    Callback   Click to schedule a future callback for this patient.
    NOAH   Click to enter NOAH link for this patient.

ADVANCED SEARCH IN DETAIL:

- At the top of **Home Page**, click adv search link to open the **Advanced Search** screen.

- The **Advanced Search** screen offers a variety of search options.

- On the far-right corner are two quick links:

  archive search   click to access the archive patient database.
  basic search   click to open the basic search screen.

- In the main section of the Advance Search screen, choose from a variety of search fields. Simply enter information into any of the field boxes including:

  First or Last Name, Phone, Zip, Date of Birth
  Patient ID or Referring Physician
  Invoice Number or Hearing Aid Serial Number
  Zip/Postal Code search for clinics

  Click search to view a single clinic database (the clinic whose calendar you are currently viewing). Click search all clinics to view the database for all your clinics.

  Links to open Quick Add and Add a New Patient screens are available to create new patient files.

- Check the box beside Default to advanced search if you would like the Advanced Search screen to appear as your default search screen when you log into Sycle.

SCHEDULING A NEW PATIENT

You may begin with either patient information or from the calendar.

SCHEDULING A NEW PATIENT STARTING WITH PATIENT INFORMATION:
- A new patient must be entered into the database before an appointment can be scheduled. Two options are available for entering a new patient. Both options are on the search screen:

Quick Add screen for entering basic information in a hurry.

Patient Summary full intake screen for entering detailed patient information.

Using Quick Add screen:
- Click **search** to open **Search** page.
- Click **Quick Add** link to open Quick Add screen.
- Enter required patient information.
- Click **save + new appointment** to open **New Appointment** screen.
- Using drop down boxes and fields, enter the details regarding **type of appointment** and **referral source**.
- Click **save** to **open** calendar.
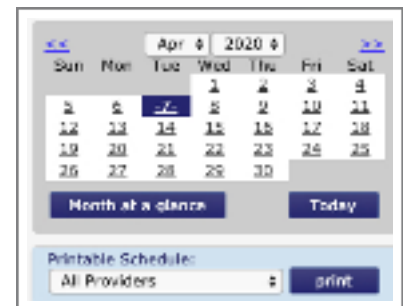- Select date, time and provider. When cursor appears as a pointing hand, click to create the appointment.

Using Add A New Patient screen:
- Click Add a new patient to open Patient Summary page.
- Enter patient data to create the Patient's Summary page.
- Click save to open Search page.
- Search for patient name by using search box or locating patient name from list of active patients shown.
- To the right of the patient's name, click appt to open New Appointment screen.
- Using drop down boxes and fields, enter the particulars regarding type of appointment and referral source.
- Click save to open calendar.
- Select the date, time and provider. When cursor appears as a pointing hand, click to create appointment.

SCHEDULING A "NEW" PATIENT STARTING WITH THE CALENDAR / SCHEDULE:
- Select **appointment date** and time on small gray monthly calendar to open schedule screen for that day.

- Move cursor to the time desired. Click when the cursor changes from an arrow to a pointing hand (near the middle of the column), to open search screen.

- Select **Quick Add** or **Add a new patient** as described above.

- Enter patient data as described above.

- Click **save** to open the **New Appointment** page.

- Complete New Appointment page: Select the Type of Appointment

  - Edit the Length of Time if needed
  - Select the Referral Source (eg: Newspaper)
  - Select the Referral Source Subcategory if applicable (eg: New York Times)
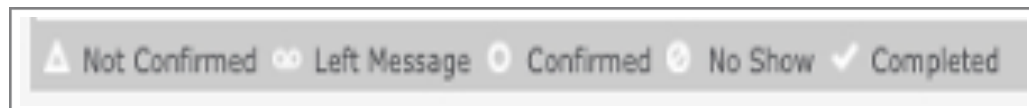
- Appointment Status descriptions:

    Not confirmed: the appointment is scheduled but the patient has not been contacted to remind them of their appointment.
    Confirmed: the patient has been contacted and reminded of their appointment.
    Complete: when Outcome Notes are entered to complete the appointment, the status automatically changes to Complete.
    No Show: if the patient does not come in for their appointment.
    Left Message: a message has been left for the patient reminding them of their appointment

- Appointment page: Select the Type of Appointment

    ○ Edit the Length of Time if needed
    ○ Select the Referral Source (eg: Newspaper)
    ○ Select the Referral Source Subcategory if applicable (eg: New York Times)

- Appointment Status descriptions:

    Not confirmed: the appointment is scheduled but the patient has not been contacted to remind them of their appointment.
    Confirmed: the patient has been contacted and reminded of their appointment.
    Complete: when Outcome Notes are entered to complete the appointment, the status automatically changes to Complete.
    No Show: if the patient does not come in for their appointment.
    Left Message: a message has been left for the patient reminding them of their appointment.

- Enter **Prior Authorization #** (for insurance reference only).

- Enter **Referring Physician** (for insurance reference, not for tracking referral sources).

- Enter any **Notes** about this patient and/or appointment. Once an appointment is on the calendar, hover over the patient name to view this note section.

- **Recurrence:** Enter information to schedule any recurring appointments for this patient.

- **Appointment Companion:** If patient is bringing a companion to the appointment, notate it here. (Eg: spouse, adult child, caretaker, etc.)

- Click **continue** to open the Appointment Confirmation screen.

- **Save**.

- **Close**.

ADDITIONAL NOTES ON TRACKING REFERRAL SOURCES:
When scheduling a first-time appointment for a patient, select the Referral Source as directed above. For all return appointments, you can create a Referral Source in Administration like current patient for existing patients.

*If Patient Referral is selected, the name of the referring individual can be entered in the **Description** field.*

*If Physician Referral is selected, a pop up screen appears. Use the drop-down box to **select a physician** from the list of Referring Physicians that have been created in the Administration section. After selecting the physician, click submit and close. You can also use this screen to add a new referring physician to your Referring Physician database.*

For Direct Mail referrals, choose the Referral Subcategory that best describes the current direct mail campaign if your clinic tracks each campaign separately.

For Newspaper or other publications, choose the Referral Subcategory to note the name of the publication.

PATIENT APPOINTMENT TYPES:
- When scheduling an appointment on the New Appointment screen, select the type of appointment from the drop-down menu.
- Appointment types are pre-determined by the clinic Administrator.
- Each appointment type is assigned a color. This color is also used when defining Designated Schedule Blocks for that appointment type. (see Block Scheduling section for detail

APPOINTMENT CONFIRMATION SCREEN:

- This page summarizes patient identity information and appointment time and date.
- A **brief summary** is provided to recap with the patient.
- **Waiting List:** check box to place patient on waiting list.
- Use drop down box to enter wait list details.
- Click **save** and **close** to return to Home Page.

CALL LIST

Call List reminders are created by Sycle to help clinics organize daily patient contact lists. The Call List is found on left side of the **Home Page**. Click anywhere in the box to open. The Call List is organized into sections depending upon the patient's status.

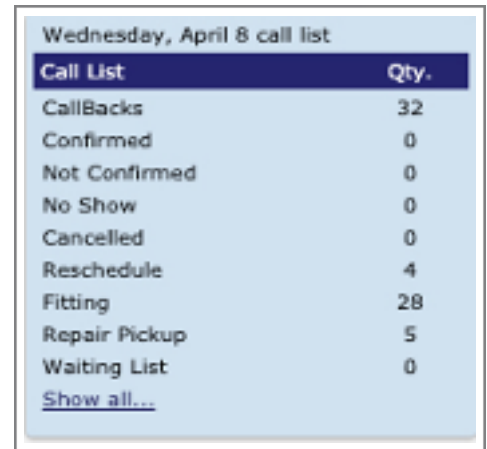Navigate the page by scrolling down or using the drop-down menu.

If the patient is a No Show, has Cancelled or Rescheduled, their name will populate onto the Call List so you can reach out to them to try to get them back into the office.

Wednesday, April 8 call list	
Call List	**Qty.**
CallBacks	32
Confirmed	0
Not Confirmed	0
No Show	0
Cancelled	0
Reschedule	4
Fitting	28
Repair Pickup	5
Waiting List	0
Show all...	

When new equipment and repair orders are checked-in in the Inventory section, a reminder is created on the Call List to make sure that patient has been scheduled for fitting or delivery.

Patient names will remain on the Call List until manually removed.

Each Call List entry gives the patient name (which is also a link to open their Patient Summary page), patient phone number, a message summarizing the reason for the call, and a variety of options to record the outcome of the call. Available options will vary depending upon the type of call as seen in the sample view above.

The Not Confirmed category is populated with appointments scheduled in your clinic tomorrow so patients can be called with a reminder about their upcoming appointment.

EDITING & RESCHEDULING APPOINTMENTS

RESCHEDULE, CANCEL OR DELETE AN APPOINTMENT:
- Locate patient's appointment on the schedule.
- Click on patient name.
- Click function desired from bottom right corner:
    - Reschedule removes the appointment from the original time and prompts to select new date and time.
    - Cancel removes appointment from the schedule.
    - A prompt appears to enter the reason for cancellation (use drop down box).
    - Delete simply removes the appointment.
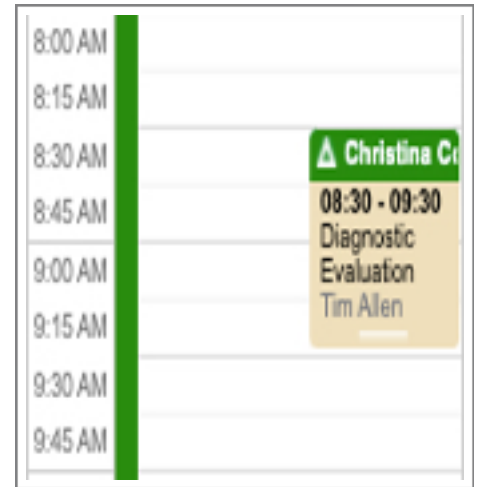
TO "SQUEEZE" AN APPOINTMENT ON TO THE CALENDAR:
- To right of a scheduled appointment is a white square for the first 15 minutes and colored squares for remainder of the appointment.
- Click on the **colored square** to the right of the appointment time to "squeeze" in a patient during another scheduled appointment.
- The basic search screen will open. Enter an existing patient name or add a new patient.
- Once you enter the patient information, the new appointment is "**squeezed**" into the time slot selected.

Note: The first 15 minutes of every appointment is protected to prevent totally double booking appointment.

TO EDIT AN APPOINTMENT:
- On the schedule, click on the patient's name to open the Appointment Summary page.
- There are several functions available at the top right of the page related to the appointment:

    Confirm appointment: Click to change status of appointment from unconfirmed to confirmed.

    No show: Select if the patient did not show up for appointment.

    Edit: Select to open the Appointment Summary screen to edit the details of appointment.

    Delete: Select to delete appointment.

Reschedule: Select to change appointment time.

Cancel appt: Select to cancel the appointment and note the reason for cancellation.
- There are print functions available at the bottom left of **Appointment Summary** page:
- **Print intake form:** Select to print a blank patient intake form.
- **Print outcome form:** Select to print a blank appointment outcome form.
- **Edit intake:** Select to open Patient Summary page for patient.
- **Enter outcome:** Select to open Appointment Outcome page and enter outcome information.
- See **Appointment Outcome** page details below.

BLOCK SCHEDULING

BLOCK SCHEDULING:

There are two types of block scheduling available:

- Schedule Block is used to totally block out a portion of the schedule. It works nicely for lunch, meetings, vacation, holidays, etc. This block type is indicated by a white square in the schedule and includes a description of the block.

- Dedicated Schedule Block is used to note a protected time block on a schedule. Perhaps a clinic would like to have 90-minute time slots reserved for hearing tests to make sure new patients can be scheduled without having to wait several weeks to get into the clinic.

A dedicated block is indicated by a colored bar on the left of the appointment time. Every appointment type is assigned a unique color and length of time by your Sycle Administrator. In the example below, you will see a 90-minute hearing test has been assigned the color red. So, when entering a designated block for a 90-minute hearing test, a red bar appears in the desired time slot.

To use Schedule Block:
- Click the **starting time** on the calendar.
- Click Schedule Block to open the Staff Schedule Block screen.
- Enter **length of time**.
- Enter **description of block**.
- If you would like this to be a recurring block, enter **details**. Click **save**.

To use Dedicated Schedule Block:
- Click the **starting time** on the calendar.
- Click Dedicated Schedule Block to open the **Add Dedicated Schedule Block** screen.
- Select the **DSB type** from the appointment type listed in the drop-down box (Other appointment types can be scheduled during a DSB, but this serves as a visual indicator of what appointment types are desired.)
- Follow the directions on the screen for selecting number of blocks.
- Enter **length of time**.
- If you would like this to be a recurring block, enter **details**. Click **save**.

Note: To schedule a patient into a "DSB" (Dedicated Schedule Block), simply click on the desired time to open Appointment screen. The administrator designates the types of appointments and corresponding colors that can be used as "DSB".

ENTERING APPOINTMENT OUTCOMES

APPOINTMENT OUTCOME:
• Click on patient name on calendar to open the **Appointment Summary** page.

• Click enter outcome to open the **Appointment Outcome** page.

View of top portion of Appointment Outcome page.

• Appointment companion: Enter information about person accompanying patient to appointment if applicable.

• Appointment outcome:
  ○ Outcome Notes: Recording the outcomes notes from each appointment creates a chronological history of the patient's treatment. This section is usually completed by the provider/dispenser. If the provider/dispenser writes chart notes by hand, another staff member can key in the treatment notes created by the provider.
  ○ Diagnosis Codes: coding used for insurance billing purposes
  ○ Check boxes to note if a patient is a Medical Referral, Tinnitus or Speech Pathology patient.

- **Hearing test:** Level: The first drop-down box is a list of hearing test results. This box must be completed for every appointment. Choices include Did Not Test, Incomplete Test or any of the levels of hearing loss.

- **Privacy:** Check applicable boxes.

- **Mailing lists:** If you use Sycle's direct mail service, check the letters you would like this patient to receive.

- **Future callbacks:** Click new callback to create a new entry for callback list.

- **Patient recall:**
    - Select new recall to create a new patient recall.
    - Previously created recall dates are listed.

- **Custom groups:** Assign the patient to as many custom groups as applicable as described in Patient Summary detail section. Marketing reports can be generated using custom groups.

- **Purchases:** Select yes to open Purchase Summary page to create a repair, loan or purchase for a patient.

Note: Creating a purchase/invoice in Sycle tracks any activity involving patient equipment, whether or not there is a financial cost to the patient. Create a purchase/invoice for any items sold, custom orders, loaner/trial aids, repairs, services, etc.

- See Creating A Purchase section below for detail.

- Previous receipts: Invoice, receipt and statement history are available in this section. Simply click on the date to open the Purchase Summary page and view that invoice.

- Previous appointments: Sycle maintains a chronological list of all appointments and outcomes for patients.

USING SYCLE NOAH SYNC WHEN ENTERING APPOINTMENT OUTCOMES:

If you enter NOAH from your desktop, you will not be on line.

Entering NOAH through Sycle, allows you to be on line so NOAH testing data can be automatically transferred into Sycle.

Using the following recommended procedure allows you to enter the patient's appointment outcome information as well as auto-populate Sycle with their NOAH test thresholds:

- Start by locating the **patient's appointment** on the Sycle schedule.
- Click on **patient's name** to open the Appointment Outcome screen.
- Click on "**enter outcome**" button.

- Click on **NOAH** button.
- Complete the hearing test in NOAH.
- **Save** test results in NOAH.
- **Close**.
- Click on "**refresh**" button (this allows transfer of data from NOAH to Sycle).
- Enter any remaining information needed to complete the appointment outcome results in Sycle (eg: notes into Outcome Notes section).
- Click **save** on Appointment Outcome screen to open Appointment Summary screen.
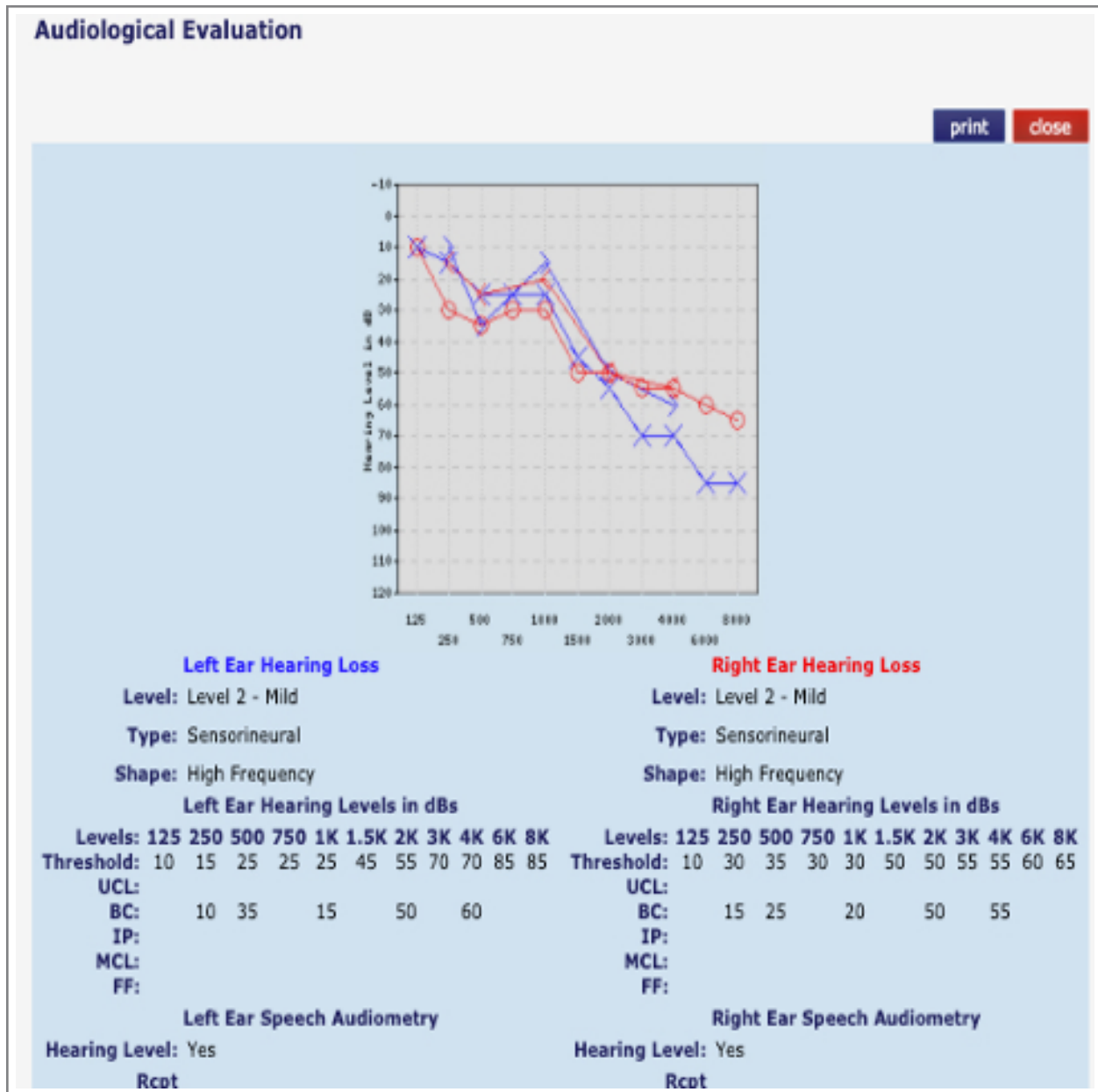- Click **close** on Appointment Summary screen.

View of hearing test section within Patient Summary page

PRINT APPOINTMENT OUTCOME:
- Open **Patient's Summary** page.
- Scroll down to **Appointments** section.
- Click on **date** of hearing test to open Appointment Summary screen.
- To print, click on **print button** in top right corner of screen.
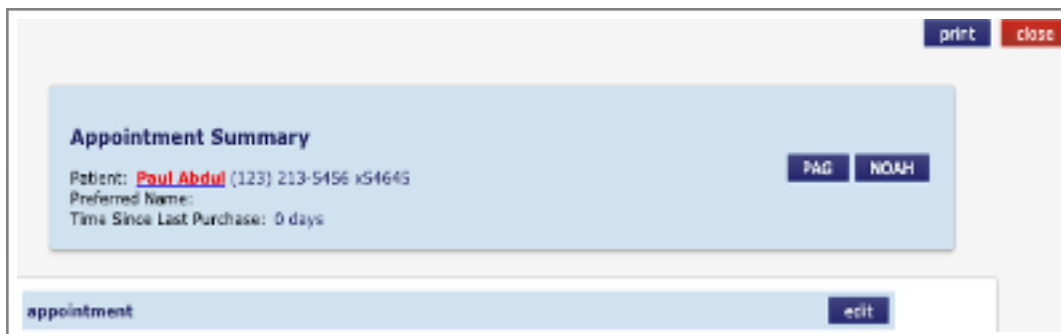
VIEW HEARING LOSS RESULTS:

- Open **Patient's Summary** page.
- Scroll down to **Appointments** section.
- Click on **date** of hearing test to open Appointment Summary screen.
- Scroll down to Hearing Tests section. Click **view** to open Audiological Evaluation screen.

PRINT HEARING LOSS RESULTS:
- Open **Patient's Summary** page.
- Scroll down to **Appointments** section.
- Click on **date** of hearing test to open **Appointment Summary** screen.
- Scroll down to **Hearing Tests** section. Click **view** to open Audiological Evaluation screen.
- Click **print**.

Note: A minimum of 5 thresholds per ear is required to print the graph. Adobe Acrobat may be used to edit .pdf to insert fields into bottom section that do not auto-populate. For assistance contact our customer support team at 888-881-7925.
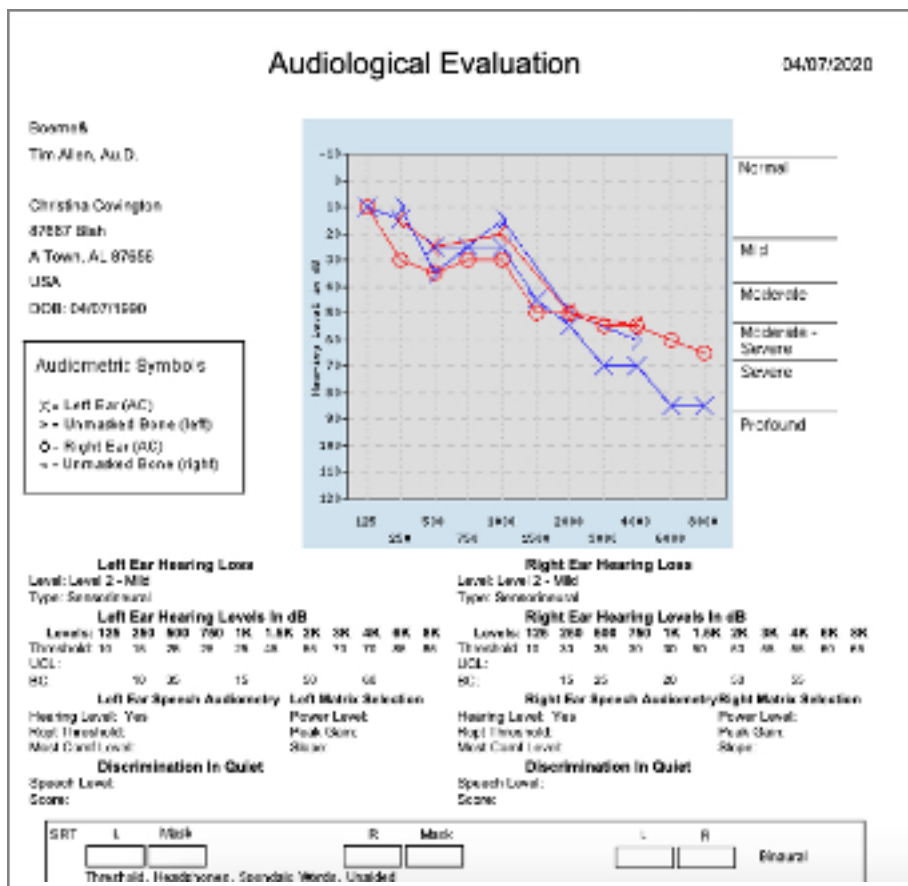
CREATING A PURCHASE / INVOICE

In Sycle, creating a "purchase" or "invoice" is the means to connect Patients with your clinic's Inventory and all related activity. Creating a purchase/invoice tracks any activity involving patient equipment, whether or not there is a financial cost to the patient. Create a purchase/invoice for items sold, custom orders, loaner or trial aids, repairs, services, etc.

CREATING A PURCHASE:

• Purchases/Invoices for hearing aids are always connected to an appointment. If the purchase is not already connected to an appointment, Sycle will prompt you to create one.

• All transactions created on a Purchase Summary page are recorded chronologically on the Patient Summary

• page in the invoice section.

• There are several ways to open a Purchase Summary page: Opening from the appointment Calendar:
   o Click on patient name on calendar to open the Appointment Summary page.
   o Click on patient name to open Patient Summary page.
   o Click purchase to open Purchase Summary page and create a purchase/invoice.

Opening from the Appointment Outcome page:
When entering the outcome results of an appointment, select either **yes or no** when asked whether to create a purchase.

Opening from the Search Results page:
Click **purchase** link to right of the patient name to open Purchase Summary page.

Opening from the Patient Summary page: Click purchase button in top right corner.

PURCHASE SUMMARY PAGE IN DETAIL

PURCHASE SUMMARY PAGE IN DETAIL:

• The patient and clinic information is auto populated.

• Because Sycle always connects a purchase/invoice for a hearing aid with an appointment date, a prompt will appear on the page to remind you to associate an appointment with the purchase. Click add hearing aid purchase to this appointment to use the appointment referenced in the prompt or schedule a new appointment before creating a Purchase Summary.

• Once the Purchase Summary is connected to an appointment, the screen changes to include Hearing Aids onto the list of options.
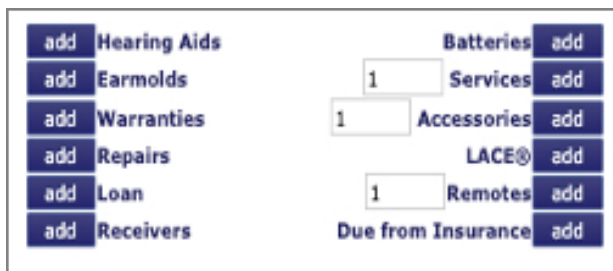
• Select add by the category you wish to add to the purchase/invoice. Each category has a customized page for entering purchase information. Available items and services within your clinic should be pre-loaded into Sycle by your Administrator.

• See below for each customized category page in detail.

Hearing Aid Purchase: (either from In Stock Inventory or custom orders)
Click add button to the left of Hearing Aids to open Hearing Aid Purchase screen.

• Using the drop-down boxes, select the correct information for the make and model of hearing aid being ordered or sold. Be sure to enter left and right aids accordingly.

• If patient is purchasing a stock hearing aid already in inventory, use drop-down box and select serial number. Sycle will auto populate information related to that serial number.

• If this is a new or custom order, start with the second drop-down box. Select make and model information. The Serial Number and MFR Invoice # remain blank until the time the order is received.

• Enter adjustments to sales price as needed by either manually changing the Retail Price or using the add discount option. Discount types are pre-loaded by your clinic Administrator and can be a dollar amount or percentage. (Eg: a percentage discount for cash or a dollar amount for a coupon.)

• Enter purchase date.

• Enter CPT code if billing insurance.

• Check yes if sales tax is to be added (for information on applicable taxes if any, see your clinic Administrator).

• Enter as needed:
   ○ Number of years for MFR Warranty and L&D Warranty.
   ○ Replacement Deductible amount for Loss & Damage claim.
   ○ If you would like to use Sycle to create an order form to be faxed or sent in with impressions to a manufacturer, complete the balance of the section. It includes additional options and information needed to place the hearing aid order:
   ○ Control and/or Custom options information
   ○ Canal Length
   ○ Ear Texture
   ○ Venting
   ○ Color
   ○ Remote Control
   ○ Mfr. Instructions: Any special notes to the manufacturer about this order.

• Additional items can be added to purchase using options at bottom of Hearing Aid Purchase screen. (The screens for ordering these additional items can be configured by the clinic administrator to automatically expand if desired.) Click on item name to open customized screen for adding to the order:
   ○ Earmold Purchase
   ○ Receiver Purchase
   ○ Dome Purchase
   ○ Tube Purchase

View of Earmold Purchase screen.

- If patient is purchasing two aids, click binaural fit to add the second aid to the Purchase Summary:
  - For stock aids, select serial number from drop down box.
  - Edit price, discount type and warranty information as needed.
  - Click save to return to the Purchase Summary page.

Ordering Earmolds, Receivers, Accessories, and Remotes from Purchase Summary screen:
- Click the **add** button to the left of any category to add to purchase/invoice.
- Each category opens a customized ordering screen.
- Use drop-down boxes and fields to enter information.
- Click **save** to return to Purchase Summary page.

Services:
- Service items are pre-loaded by the Administrator. (Eg: dispensing fees, hearing test fees)
- Click **add** button to left of Services.
- Use drop-down boxes and fields to add services to purchase/invoice.
- Click **save** to return to Purchase Summary page.

Batteries:
- Battery prices are pre-loaded into Sycle by the Administrator.
- Click **add** button to left of Batteries.
- Use drop-down boxes and fields to add batteries to purchase/invoice.
- Click **save** to return to Purchase Summary page.

Loan / Trial Aids:
This option is used to track any hearing aid that has been entered into the clinic's inventory and is being loaned to a patient without purchasing. (Eg: They may have a loaner aid while their aid is in for repair. Your clinic may have a trial program where a patient can wear the hearing aids home on a trial basis before purchasing.)

- Click **add** button to left of Loan to open Loan Out screen.
- Select the serial number from the drop-down box.
- Enter deposit amount if one is charged by the clinic.
- Enter date the loan/trial was started.
- Click **save** to open the Purchase Summary screen.
- Click **save** on the Purchase Summary screen.
- Print if desired.

• Sycle moves hearing aid/serial number from In Stock inventory to On Loan inventory.

Note: When the patient is charged a deposit for the loan or trial, it must be added to the loan Purchase Summary as a payment. The deposit will show as a credit on the patient's account and on business reports. When the patient returns the loan or trial, restock the aids into Inventory and refund the deposit payment to the patient.

A loan or trial payment cannot be transferred between invoices. If the patient wishes to purchase the loaner aids, you may use the loan purchase summary to sell the aids. Once the loan aids are restocked, a new "sell" function button will appear. You can also create a new unique invoice for the sale.

Alternate Method: Create Loan purchase/invoices using Inventory on Home Page:

• Enter Inventory from Home Page. Using the drop-down menu select BTE In Stock.
• Enter hearing aid search data as desired. Click **Go** to open a list of serial numbers in stock.
• Find serial number. Click **Loan** to the right to open the Search Results page.
• Locate patient name.
• Click **Loan** to right of the patient name to open Loan Out screen.
• Enter Deposit Amount if any and the Loan Date.
• Click **save** to open Purchase Summary and view aids on Loan.
• Click **save**. Print if desired.

Returning Loan aids back to Inventory:
When loan aids are returned, ALWAYS restock into your inventory. There are two ways to return a loan aid:

Through the Patient Summary page:
• Go to Invoice section of the Patient Summary. Click on **Date** to open the purchase/invoice.

• Click **Restock** to open Restock Inventory page.

• Enter Deposit Refund amount if any, Loan Return Date and any notes.

• Click **save** to return to the Purchase Summary page.

• Click **save** on Purchase Summary page.

• Print if desired.

• Sycle has returned aid to In-Stock inventory. Now the aid is available again for purchase or loan.

Through Inventory on Home Page:
• Click **Inventory** on Home Page.

• Using drop-down menu at the inventory screen, select **BTE On Loan**.

• Locate serial number loaned to patient.

- Click **Restock link** to right of serial number to open Purchase Summary page.

- Click **Restock** to right of serial number on Purchase Summary to open Restock Inventory page.

- Enter Refund Amount if any, Loan Return Date and any notes.

- Click **save** to return to Purchase Summary page.

- On the Purchase Summary, restocked serial numbers will show two line items:
    - Loan (when it was loaned out)
    - Refund (when it was rescued)

- Click **save** and close.

Repairs:
- Click **add** button to left of Repairs.

- Use drop-down box to select the hearing aid being sent in for repair. There are two forms available if both aids are being repaired together. All hearing aids entered in the Patient Summary will be available for selection, including current and older equipment.

- To enter an aid not listed in equipment on the Patient's Summary, select Other. Fields are provided to enter information about that aid.

- Click **save** to return to the Purchase Summary page.

- Repair purchases/invoices are tracked in Sycle's Inventory section. See Inventory for more details.

Alternate Method: Create Repair purchases using Patient Summary page:
- From the patient's current equipment section, select the hearing aid desired.
- Click **repair**.
- Using the drop-down boxes, enter details about the repair order.
- Click **save** to open the Purchase Summary screen.
- Click **save** on Purchase Summary screen to complete order.
- Print if desired.

View of upper portion of Repair invoice

Adding a Payment:

- Click **Payment** to open the Add Payment screen. Enter amount of payment.

- Select type of payment from the drop-down box. Add a description if desired. Date defaults to today unless changed otherwise.

Due from Insurance:

- After all items have been added to the purchase/invoice screen, click **save**.

- If an insurance claim is being filed for this patient, click **add** button to the left of Due from Insurance.

- Select **Insurance Company** from drop down box.

- If the amount of benefit is known, enter the dollar amount into Est. Benefit field.

- If the amount of benefit is unknown, leave Est. Benefit field blank. This moves the entire invoice balance to Amount Due from Insurance.

- Click **save** to return to the Purchase Summary screen.

- Click **save** on the Purchase Summary screen.

- Two new buttons will appear after you save: attach existing HCFA and create new HCFA.

- If you are not going to create a HCFA form, select **print** if desired and close the Purchase Summary page.

If you will be creating a HCFA form using Sycle:

- Select **create new HCFA** button.

- Sycle will auto populate the HCFA with the information that has been entered into the Patient's Summary page.

- Edit the HCFA form as needed and select view printable. When complete, select **print**. A print setup link is in the upper right corner. Select the printing format desired.

- To attach an existing HCFA, choose **attach existing HCFA**.

Note: Sycle has an in-house team of insurance specialists available for support and service. Other services available through Sycle include credentialing, billing, electronic filing and claim tracking services.

Printing A Purchase Summary/Invoice:

• When you save the Purchase Summary, all line items are listed for your review.

• Click on **Action links** to edit, delete or return each line item as needed.

• Click **print** to view the Purchase Summary.

• Enter a Memo if desired.

• Click **print** to view the purchase/invoice with the clinic logo. Print.

Note: To upload your logo into Sycle contact our customer support team at 888-881-7925.

ENTERING PAYMENTS AFTER THE PURCHASE SUMMARY HAS BEEN CREATED

ENTERING A PAYMENT ONTO A PATIENT INVOICE:

• Open the Patient Summary page.

• Scroll down to Invoices.

• Click on date of invoice to open Purchase Summary.

• Select **payment** to open Add Payment screen.

• Enter amount of payment.

• Using drop-down box select **Payment Type**. Note: Use "Insurance" for posting all insurance payments.

• Enter date payment was received.

• Click **save** to return to Purchase Summary. Print.

ENTERING A REFUND:
• Open the Patient Summary page.

• Scroll down to Invoices.

• Click on date of invoice to open Purchase Summary.

• Select **refund** to open Add Refund screen.

• Using drop-down box select Refund Type.

• Using drop-down box, select Refund Reason.

• Enter amount refunded.

• Enter description.

• Enter refund date.

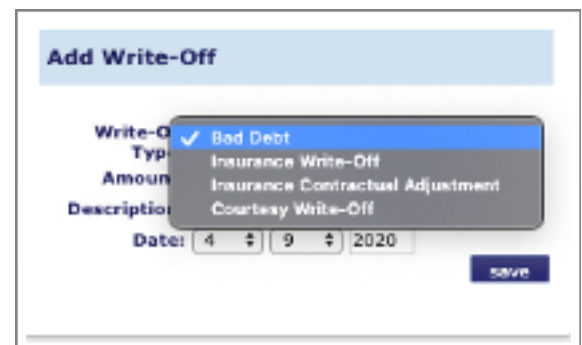• Click **save** to return to Purchase Summary.

• Print.

ENTERING A FEE:
• Open the Patient Summary page.

• Scroll down to Invoices.

• Click on date of invoice to open Purchase Summary.

• Select fee to open Add Fee screen.

• Using drop-down box select Fee Type.

• Enter amount of fee.

• Enter description.

• Enter fee date.

• Click **save** to return to Purchase Summary.

• Print.

ENTERING A WRITE-OFF:

• Open the Patient Summary page.

• Scroll down to Invoices.

• Click on **date of invoice** to open Purchase Summary.

• Select **Write-Off** to open Add Write-Off screen.

• Using drop-down box select **Write-Off Type**.

• Enter amount of write-off.

• Enter description.

• Enter write-off date.

• Click **save** to return to Purchase Summary.

• Print.

RETURN / EXCHANGE / REPLACE CURRENT EQUIPMENT
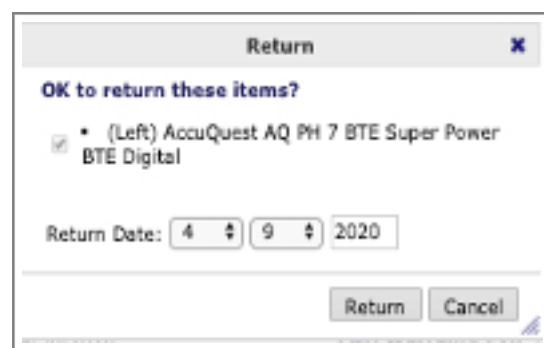
Return Current Equipment =   Patient is returning the equipment for a refund.

Exchange Current Equipment =   Patient is exchanging one item for another.

Replace Current Equipment =   Patient lost their original hearing aid and a replacement aid has been
   received from the manufacturer using patient's Loss & Damage warranty.

RETURN CURRENT EQUIPMENT:

• Open the Patient Summary and scroll down to Current Equipment.

• Click the **return** button over the equipment that is being returned.

• A pop-up Return screen will ask if it is OK to return these item(s). If both aids are being returned, both aids will appear on screen. Leave the check mark to the left of items returned.

• Click **Return**.

• A second pop-up Return screen asks for an OK to return purchase.

• Click **OK** to return or Cancel to delete return.

• The original Purchase Summary screen opens indicating Item(s) has been returned.

• If a refund is being issued, click **Refund** to open.

• Add Refund screen. Enter refund information.

• Click **Save**. Print. Close.

EXCHANGE CURRENT EQUIPMENT:

• Open the Patient Summary and scroll down to Current Equipment.

• Click the **exchange** button over the equipment that is being exchanged.
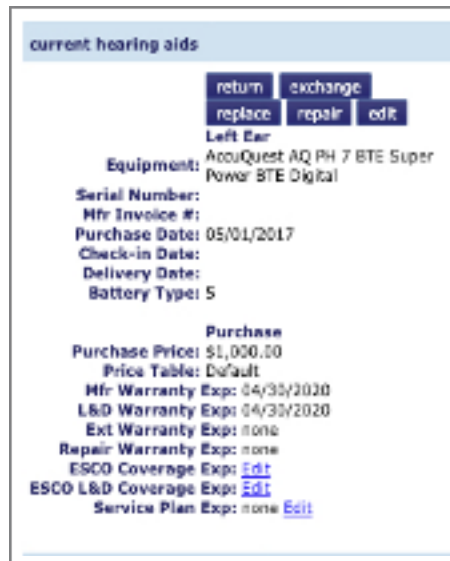
• A pop-up Return screen will ask if it is OK to return these item(s). If both aids are being returned, both aids will appear on screen. Leave the check mark to the left of items returned.

• Click **Exchange**.

• The Hearing Aid Purchase screen will open.

• Enter information about the new aid(s).

• Click **Save**. Print. Close.

REPLACE CURRENT EQUIPMENT:

• Open the Patient Summary and scroll down to Current Equipment.

• Click the **replace** button over the equipment that is being exchanged.

• The Replacement Hearing Aid Purchase screen will open.

• Enter information about the new aid(s). Click **save**.

• A new Purchase Summary page will open with the replacement aid information and the loss & damage replacement deductible.

• Click **Save**. Print. Close.
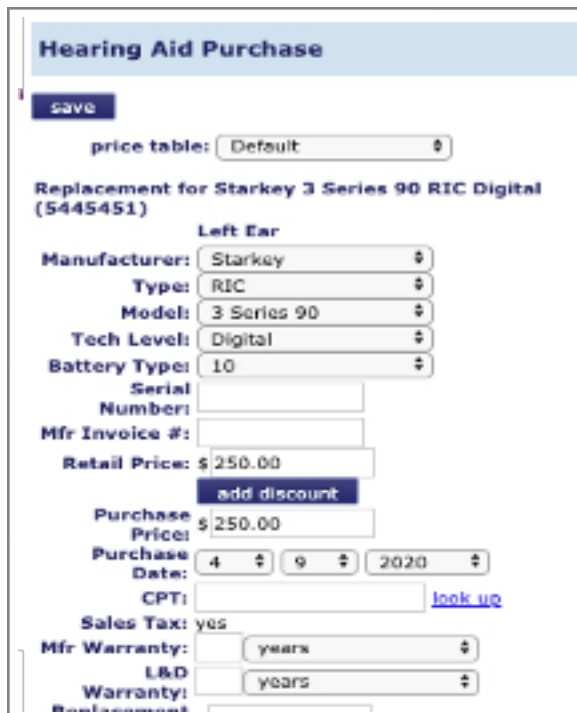
INVENTORY

The Inventory module in Sycle provides a complete tracking process for In Stock Inventory, loan / trial aids, new sales and repair orders. Each step of the journey can be viewed at a glance.

At the same time Sycle tracks movement through the Inventory module, a daily Call List is generated of patients to be contacted for scheduling.

For questions or training beyond the scope of this user guide, call our customer support team at 888-881-7925.

OPENING THE INVENTORY SECTION FROM HOME PAGE:

On the left side of the Home Page, click on the **Inventory bar** to open the Inventory module.

- Inventory categories can be navigated by scrolling down the page or using the drop-down menu in the top left corner.

- Sycle tracks several types of products by category: hearing aids, receivers, earmolds, repairs, remotes, other.

Each product category has two sections:

Check-In: to receive or check-in order from manufacturer.

Delivered: to indicate patient has received their order.

- Repairs are tracked including in and out of warranty.
- Three additional detailed lists are available:
    - BTE In Stock: all in stock aids are listed by serial number
    - BTE On Loan: list of all aids out on loan or trial
    - Remotes In-Stock

(Note: Any style of hearing aid can be entered into Inventory, it is not limited to BTEs. When entering canal aids, be sure to indicate "left" or "right".)

TRACKING AN ORDER CREATED IN THE PURCHASE SUMMARY PAGE:

When a purchase/invoice is created using the Purchase Summary page, the tracking process is automatically started. Each line item of the order is placed into the appropriate category in Inventory, waiting to be checked-in when received from the manufacturer. A example is below with detailed steps on the next page.

EXAMPLE ILLUSTRATED BELOW: If a patient orders a BTE hearing aid and an earmold, the aid will most likely arrive before the earmold. The BTE is checked-in upon arrival and the earmold remains in the Check-in section until it arrives.

Step 1:

New BTE and Earmold order for David Beck.

When order arrives, check **In From Manufacturer** box.

Enter serial number S/N. Enter Invoice number. Enter actual cost of goods. Enter date of check in. Enter any notes desired. Edit Mfr. Warranty date if your clinic tracks using invoice or fitting date rather than sale date.

Step 2:

BTE has been checked-in. Still waiting for Earmold.

Step 3:

BTE is checked-in. Earmold is checked-in.

Both items are ready for delivery.

Step 4:

Once the items have been checked-in, a reminder is placed on the Call List so the patient can be contacted to schedule delivery.

Click Call List on the Home Page to open. Fitting and Repair categories are at bottom of list.

RECEIVING / CHECKING ITEMS INTO INVENTORY IN DETAIL:

When an item is received from the manufacturer it needs to be checked-in (received) into Inventory.

• Open the Inventory module on Home Page.

• Select the Inventory category using the drop-down menu

• Locate the patient name/order.

● Using the fields and drop-down boxes provided, check-in the item.

● Enter Serial Number.
    ○ Enter Manufacturer's Invoice Number.
    ○ Enter Actual Cost of goods.
    ○ Enter Date order was received.
    ○ Enter any Notes desired.
    ○ Enter Warranty Dates if your clinic tracks using invoice dates instead of sales date.

● Click **save**.

● Once the order is checked in, it is placed in the Hearing Aids to Be Delivered To Patient category.

● A reminder is created within the fitting section of the Call List to schedule the delivery / fitting appointment.

RECEIVING / CHECKING IN REPAIRS:

- The process for Repairs is very similar to checking in a new order once the Purchase Summary is created.
- Locate the Repair order in the Repair Check-In section of Inventory.
- Click inside the box beside Repaired to create a check mark.

- o Using fields and drop-down boxes, enter the Repair Cost, Repair Result and Warranty Date.
- o A reminder is created on the Call List to schedule the delivery appointment.

ENTERING NEW ITEMS INTO IN-STOCK INVENTORY:

Note: Any style of hearing aid can be entered into Inventory. When entering custom aids, be sure to designate Left or Right ear as appropriate to the serial number.

- On the left side of the Home Page, click on the **Inventory** dark bar to open the Inventory module.
- Select **add to in-stock** at the top of Inventory page to open Add Inventory Item page.

- Using the drop-down menu, select the type of item you are adding into inventory:
    - Hearing Aid
    - Remote
    - Other

- Using the fields and drop-down menus, enter information about the item onto the Add Inventory page. (Below are examples of Add Inventory pages.)
- Click **save** to view summary screen. Edit as needed.
- Click **save** to enter item into Inventory.
- Select **equipment inventory** button to return to the Inventory main page

TO MOVE IN-STOCK ITEMS BETWEEN CLINICS:

Note: Any type of hearing aid can be placed in Inventory, not just BTEs. Any serial number can be moved from inventory in one clinic to inventory in another clinic.

To transfer one hearing aid / serial number to another clinic:

Do not use the "move in stock items" button at the top of the inventory page.

- Before opening the Inventory section, make sure you are in the clinic from which you want to transfer stock.
- Locate the serial number you want to transfer in one of two places:
    - In the Inventory section on the BTE In-Stock list
    - In the Report section in the Inventory Status report
- Click on **the serial number** to open the Inventory Detail page for that serial number.
- Click **transfer** to open the Inventory Transfer page.
- Select the clinic you wish to transfer the serial number to.
- Click **Save**.

View of drop down for BTE In Stock List
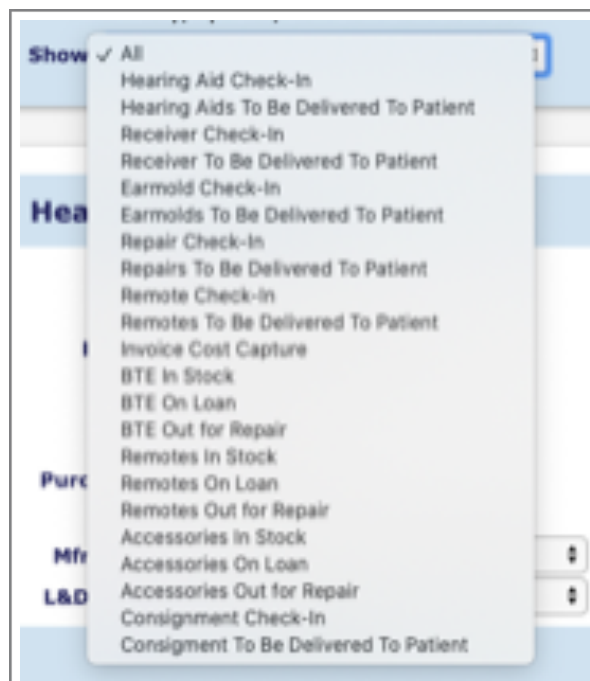
View of Inventory Status Report page

To transfer a group of hearing aids / serial numbers to another clinic:

- Before opening the Inventory section, make sure you are signed into the clinic into which you want to transfer stock (the destination clinic you want to move the serial numbers into). Use the drop-down box above the small gray calendar to select the destination clinic.
- Open the Inventory section.
- Click **move in-stock items** at top of page to open Move BTE Items page.
- Using the "report by" drop-down box, select the clinic from which you want to transfer stock (the source clinic where the serial numbers are now). Click **GO**. This creates a report of the serial numbers available for transfer from that clinic.
- Place a check in the box under the Move column for each serial number you wish to transfer.
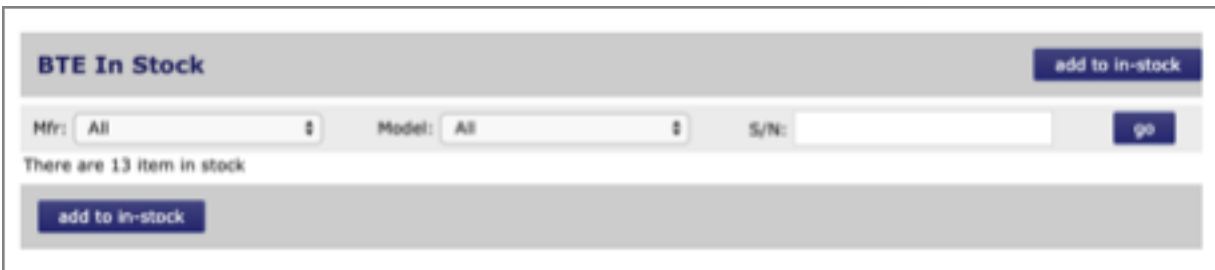- **Save**. The serial numbers checked are automatically transferred into the clinic you are signed in to.

BTE IN STOCK LIST:
• Open Inventory section.
• Select BTE In-Stock from drop down menu to open BTE In-Stock page.
Note: Any type of hearing aid can be entered into inventory, not just BTEs.

• To view the entire list of In-Stock hearing aids in stock, simply click **go**. View options are also available by manufacturer, Model or Serial Number. Use the drop-down boxes to sort as desired.

• There are several functions available in the Inventory Detail screen related to a specific serial number: Edit To edit any details about this hearing aid.

|	
Loan	If this hearing aid is being loaned to a patient, click loan to open the patient search screen. Process the loan as described in the Loan section of Patient Summary detail.
Sell	To create a sale for this hearing aid, click sell to open the patient search box. Select the patient and create a Purchase Summary as described in Patient Summary detail.
Repair	To create a repair order for this in stock hearing aid, click repair to open the Inventory Out for Repair screen.
Transfer	To transfer this hearing aid to another clinic, click transfer to open the Inventory Transfer screen.
Retire	To entirely remove this hearing aid from inventory, click retire. (Eg: if you have an older demo aid that you are no longer using.)
Return for credit	Click to remove this hearing aid from stock, to be returned to the manufacturer for credit.

• Select equipment inventory to return to the main inventory page.
• Select add item to add an item into inventory.

BTE ON LOAN LIST:

• Select BTE On Loan from drop down menu at top of Inventory main page to open BTE On Loan page.
Note: Any type of hearing aid can be put on loan or trial, not just BTEs.
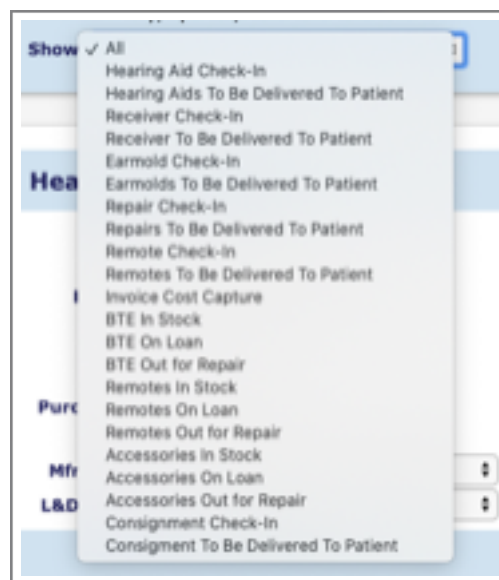
• Click on the serial number to open the Inventory Detail screen.

• Several functions are available related to this serial number from the Inventory Detail screen.'

• Select edit, restock or view receipt to open the related function screens.

• For details on creating purchases and returning loaned or trial hearing aids, see the Purchase Summary page details section.

Note: The Remotes in Stock and Remotes on Loan sections of Inventory are treated in the same manner as the BTE In Stock and BTE On Loan sections above. A serial number is required for tracking In Stock Inventory items.