HealthiPlan User Guide

Sycle Pro

February 28, 2024
Revision 2.3

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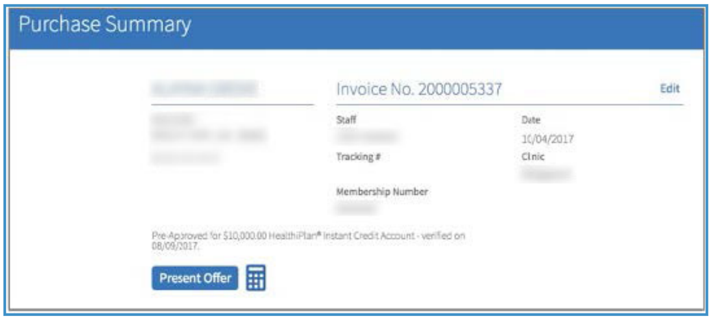
1. Prescreening Patients

When a patient is scheduled for an appointment type that is configured with both the **HealthiPlan® Prescreen** and *sales opportunity* flags enabled, the patient will be automatically prescreened[1] through the HealthiPlan® Patient Financing Program.

When a patient has been prescreened, a banner will appear in the Purchase Summary screen and the Patient Summary screen (under Patient Finance). This info will also appear when you hover over the Appointment Notes or click the Patient Finance button.



If a patient is not automatically prescreened, the prescreen process can be triggered later (see Approving Patients with Instant Credit, page 4).

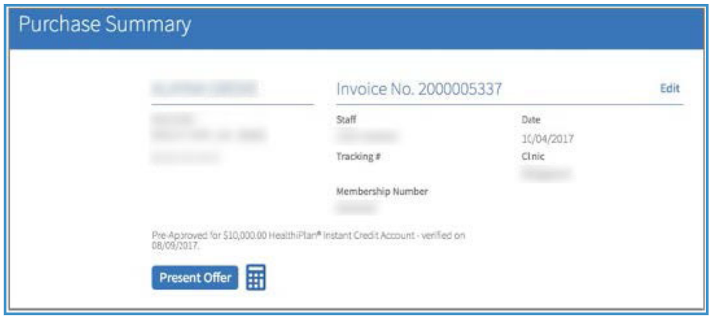
[1]The patient's address must match the primary addresses listed at the credit bureau. For patients living in an assisted living facility, the address of the facility may not be the one listed with the credit bureau.

2. Accepting a Prescreen Offer

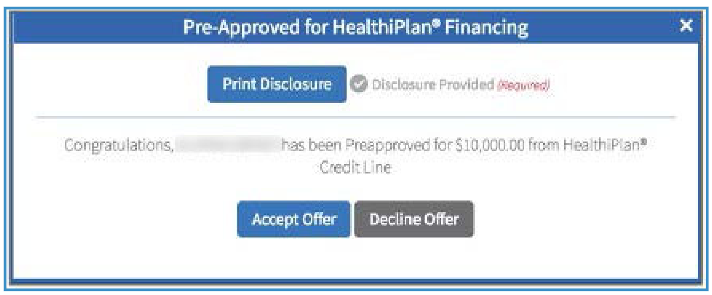
When a patient has been prescreened (see Prescreening Patients, page 1), the offer can be presented to the patient from the Purchase Summary and Patient Summary screens.

> If the patient already has a HealthiPlan account, see Adding and Verifying Existing HealthiPlan® Patients, page 5.

1. On the *Purchase Summary* screen, click **Present Offer**.



2. On the *Preapproved for HealthiPlan Financing* screen, click **Print Disclosure**.



   Provide the printed disclosure to the patient.
   Inform the patient that they have been preapproved for the HealthiPlan® Credit Account, and ask them if they would like to accept the offer.

3. Do one of the following:
   - If the patient *declines* the offer, click **Decline Offer** to return to the previous screen.

   > The prescreen offer remains available to the patient for 120 days.

   > As the offer has been declined, there are no further instructions to follow in this guide. Proceed with the purchase using a different payment method.

- If the patient *accepts* the offer, click **Disclosures Provided**, then click **Accept Offer**.

4. Complete the fields in the *HealthiPlan® Accept Pre-approval* screen.

   > Most of the patient data on this screen is automatically populated with the information from the patient's record in Sycle. Verify that this information matches the patient's government ID. If the patient's record is incomplete or contains discrepancies, some fields—in addition to those mentioned below—will need to be edited or filled manually.

   a. Enter the last four digits of the patient's *social security number* in the **Last 4 Social Security Number** and **Last 4 Social Security Number (Again)** fields.
   b. Click **Apply**.

   > PO box addresses are not accepted for credit applications. The patient's address must match the primary addresses listed at the credit bureau.

If the application is approved, the *Accept Preapproval* screen will show the credit limit.

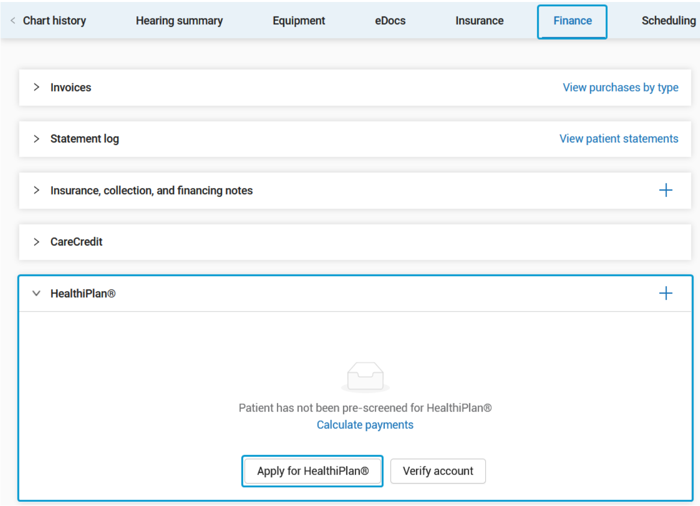
You can now exit this window. The HealthiPlan credit account can now be used to fund the patient's purchases (see Funding a Purchase with HealthiPlan®, page 9).

3. Approving Patients with Instant Credit

If patients have not been prescreened (or were not approved for prescreen), an **Apply For HealthiPlan®** button is available in the Patient Finance section of the Patient Summary screen. The Purchase Summary screen also contains an Apply for HealthiPlan® Instant Credit section.

If the patient already has a HealthiPlan account, see Adding and Verifying Existing HealthiPlan® Patients, page 5.

1. Do **one** of the following to open the HealthiPlan® Application Form:
   - On the *Patient Summary* screen, navigate to the **Finance** tab, expand the **HealthiPlan®** section, and click **Apply for HealthiPlan®**.



   - On the *Purchase Summary* screen, click **Apply**.

2. On the *HealthiPlan® Application Form* screen, click **Print Disclosure** and provide the printed disclosure to the patient
3. Complete the fields on the *HealthiPlan® Application Form* screen.
4. Click **Apply**.

When the patient is approved[2,3], purchases can be made with the patient's HealthiPlan® credit account (see Funding a Purchase with HealthiPlan®, page 9).

4. Adding and Verifying Existing HealthiPlan® Patients

Verifying a HealthiPlan account links an existing account to the patient's record in Sycle, allowing you to use the patient's existing HealthiPlan account to fund or refund purchases within Sycle.

Verification takes one of two forms:

- A patient has a HealthiPlan account that is *not* linked to their patient record; verification will allow purchases to be charged to HealthiPlan without requiring a separate application. (See Adding External HealthiPlan® Account to Patient Record, page 6.)
- A patient has a HealthiPlan account that *is* linked to their patient record; verification is needed to allow purchases or refunds to be charged to the account (see Reverifying Existing HealthiPlan® Accounts, page 8).

This verification can be done to add a HealthiPlan account — configured outside of Sycle — to a patient's record, and/or to verify an account that is already linked to a patient record (typically done when purchasing or refunding using HealthiPlan some days after the initial account approval).

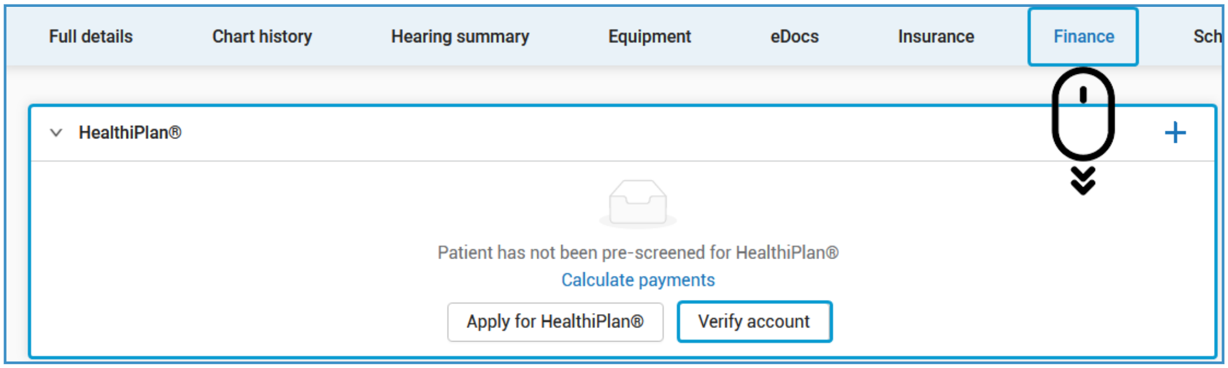
[2] If the Patient's application is denied, a message will appear stating that the patient's applications is under review ("Patient will be contacted by mail within 7-10 days.") Any further communication about the application must come from Comenity Bank via mail.

[3] Creditors are required by law to obtain a written application for applicants under 21 years of age. As such, patients under 21 will not be automatically approved for instant credit. Instead, the patient will receive a letter from Comenity Bank within 7 - 10 business days containing information on how to complete the application.

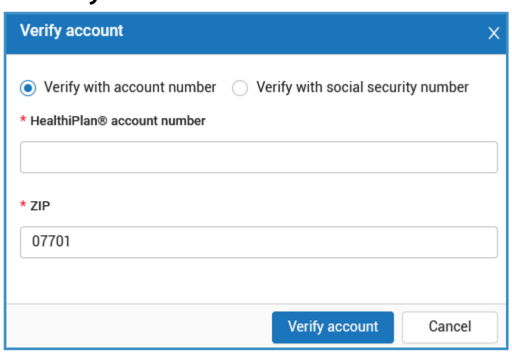
4.1. Adding External HealthiPlan® Account to Patient Record

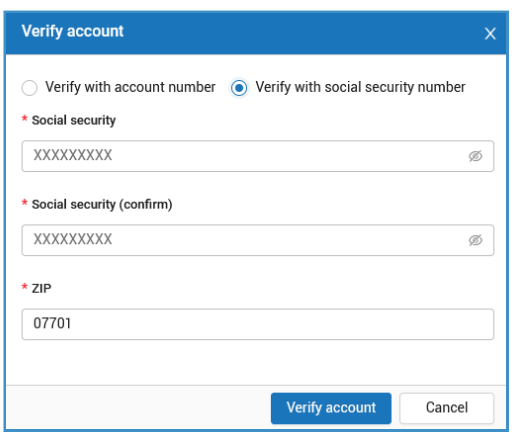
If a patient has a HealthiPlan account, follow these instructions to add the account information to the patient's Sycle record[4].

1. Navigate to the *Patient Summary* screen.
   a. Enter the patient's full or partial name in the **Patient** field. Use the **Enter/Return** key or click the Patient Search icon () to search for the patient's record.
   b. Review the search results and click the patient's name to open the **Patient Summary**.
2. On the *Patient Summary* screen, navigate to the **Finance** tab, expand the **HealthiPlan®** section, and click **Verify account** to open the *Verify account* screen.



3. On the *Verify account* screen, select either **Verify with account number** or **Verify with social security number**.





[4]Sycle does not retain the patient's account information. If a patient wants to make a purchase or receive a refund after the day they verified or were approved for a HealthiPlan® Credit account, the system needs to verify the account number (see Reverifying Existing HealthiPlan® Accounts, page 8).

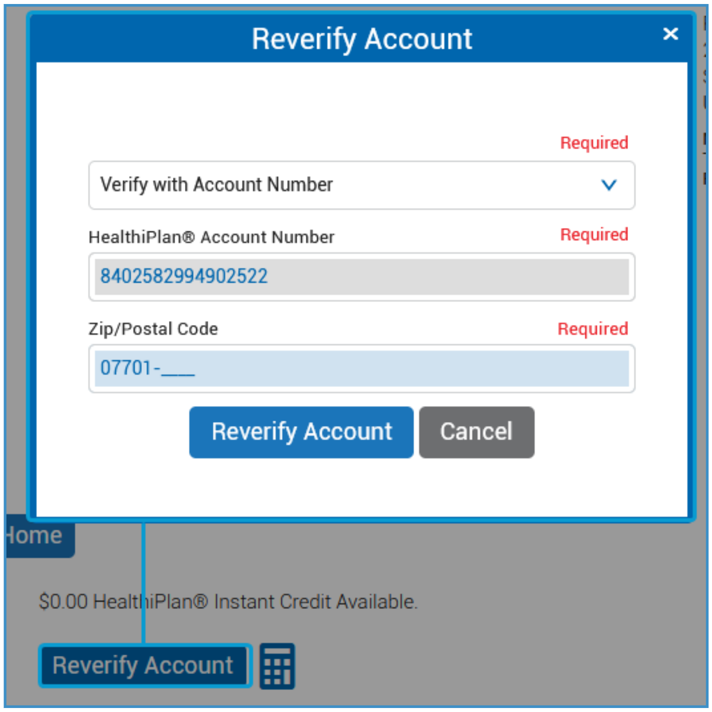
4. Depending on the verification method selected in Step 3, complete the remaining fields
5. Click **Verify account**.

With the account verified, purchases can now be charged to the HealthiPlan account. Proceed to Funding a Purchase with HealthiPlan®, page 9.

> If the Patient Summary screen shows "Patient application is under review" or "Available Credit" shows $0.00 after the verification process, the patient will need to apply for a new account. Click **Apply for HealthiPlan®** and follow the instructions in Approving Patients with Instant Credit, page 4, starting with Step 2.

4.2. Reverifying Existing HealthiPlan® Accounts

1. On the *Purchase Summary* screen, click **Reverify account** to open the *Reverify account* screen.



2. On the *Verify account* screen, select either **Verify with account number** or **Verify with social security number** in the first field.
3. Depending on the verification method selected in Step 2, complete the remaining fields.
4. Click **Reverify Account.**

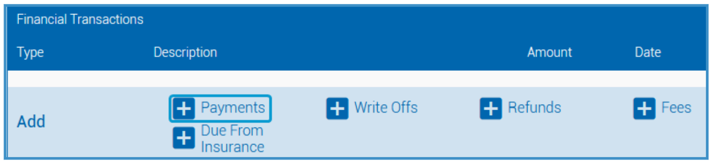
With the account verified, purchases and refunds can now be charged to the HealthiPlan account. Proceed to Funding a Purchase with HealthiPlan®, page 9 or Refunding a HealthiPlan® Credit Account, page 13.

If the Patient Summary screen shows "Patient application is under review" or "Available Credit" shows $0.00 after the verification process, the patient will need to apply for a new account. Click **Apply for HealthiPlan®** and follow the instructions in Approving Patients with Instant Credit, page 4, starting with Step 2.

5. Funding a Purchase with HealthiPlan®

After a patient's application has been approved (via prescreening or instant credit), that patient's purchases can be funded using HealthiPlan.

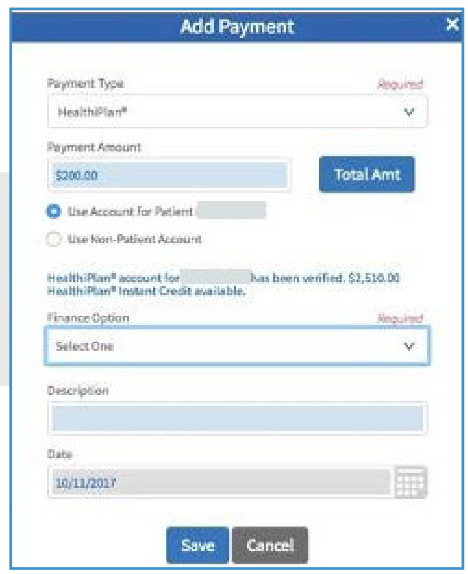
1. On the *Purchase Summary* screen, click **Payments** to open the *Add Payment* screen.



2. On the *Add Payment* screen, enter the value of the payment in the **Payment Amount** field.

> You can click the **Total Amt** button to fill the Payment Amount field with the total outstanding invoice balance.

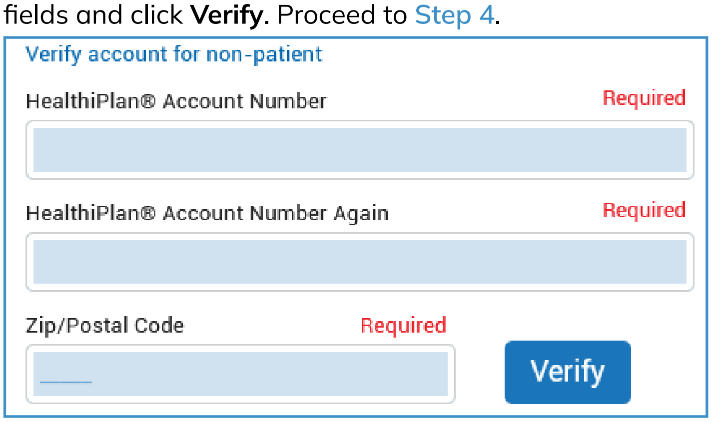
3. In the **Payment Type** field, select **HealthiPlan®** and do one of the following:



- To use the patient's account for funding, leave the **Use Account for Patient [Patient Name]** option selected and proceed to Step 4.

> If the **Use Account for Patient [Patient Name]** option is not available, the patient does not have an approved application linked to their patient record.

- To use an account that is not linked to the patient's record, select **Use Non-Patient Account**. Complete the fields and click **Verify**. Proceed to Step 4.



> Account information entered here is *not* saved to the patient record.

This section is used to apply payment from an account that is not linked to the patient. If the patient has an existing HealthiPlan account that is not linked to their patient record, add the patient's HealthiPlan account information to their record (see Adding and Verifying Existing HealthiPlan® Patients, page 5).

4. Select one of the fields under **Finance Option**.

The available finance options may change when the value of the **Amount** field is adjusted.

5. (Optional) Enter a description in the **Description** field.
6. If needed, adjust the date in the **Date** field.
7. Click **Save** to close the *Add Payment* screen and return to the *Purchase Summary* screen.
8. On the *Purchase Summary* screen, collect any outstanding balance from the patient via other payment types.
9. Click **Save**. The patient's available credit will be adjusted to reflect the purchase.

If you are shown a "*Patient's HealthiPlan payment cannot be processed, please reverify patient's account or use another form of payment.*" error message when saving, click **Reverify Account** at the top of the *Purchase Summary* screen and follow the instructions in Reverifying Existing HealthiPlan® Accounts, page 8.

10. Click **print**. This will print the invoice and the HealthiPlan® Sales Receipt.

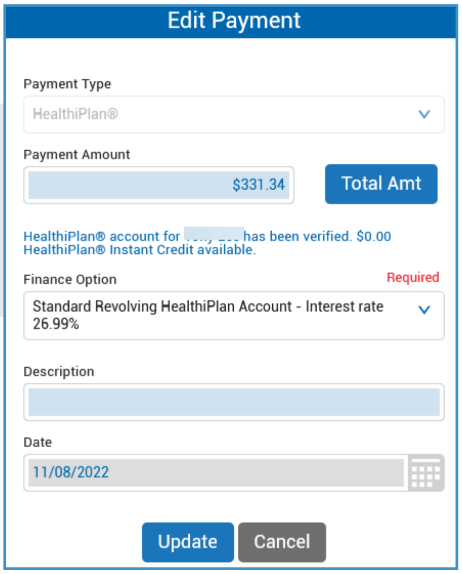
Print **two** copies of the HealthiPlan® Sales Receipt. Collect the signature(s) on both copies.

11. Provide one copy to the patient and retain the other copy for your records. This is important for your protection in any disputes.

6. Editing a HealthiPlan® Payment

A payment can be edited on the same business day the payment was made.

1. On the *Purchase Summary* screen, click **edit** on the HealthiPlan payment line to open the *Edit Payment* screen.
2. Adjust the fields on this screen as needed.



> The fields on the *Edit Payment* screen are identical to those on the *Add Payment* screen. These fields are defined in detail in Funding a Purchase with HealthiPlan®, page 9.

3. Click **Update** to close the *Edit Payment* screen and return to the *Purchase Summary* screen.
4. On the *Purchase Summary* screen, click **Save**. The patient's available credit will be adjusted to reflect the adjusted purchase amount.
5. Click **print**. This will print the invoice and the HealthiPlan® Sales Receipt.

> Print **two** copies of the HealthiPlan® Sales Receipt. Collect the signature(s) on both copies.

6. Provide one copy to the patient and retain the other copy for your records. This is important for your protection in any disputes.

7. Voiding a HealthiPlan® Payment

A payment can be voided on the same business day the payment was made. To process a refund for returned equipment, see Refunding a HealthiPlan® Credit Account, page 13.

- On the *Purchase Summary* screen, click **Delete** on the HealthiPlan payment line.

The payment is voided, and the patient's credit balance will be adjusted accordingly.

8. Refunding a HealthiPlan® Credit Account

HealthiPlan payments can be edited (Editing a HealthiPlan® Payment, page 11) or voided (Voiding a HealthiPlan® Payment, page 12) on the same day the payment was added. Refunds are not restricted to the same day the payment was added.

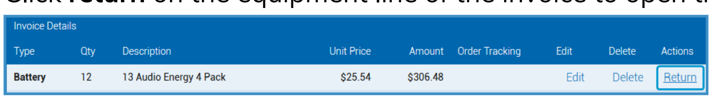
The instructions below cover returning equipment and processing a refund to HealthiPlan.

> ⚠ While you are not restricted from making refunds without making a return, it is best practice to process refunds to third parties only after the equipment on the invoice has been marked as returned. This ensures a clean audit trail.
>
> In a situation where the patient is not returning their equipment (such as changing payment methods when the void option is no longer available), return the items and refund the payments on the initial invoice using the instructions below, then create a new invoice with the items and process the new payment on that invoice.

1. Verify the patient's HealthiPlan® credit account (see Adding and Verifying Existing HealthiPlan® Patients, page 5).
2. Navigate to the appropriate invoice to open the *Purchase Summary* screen.
3. (Optional) On the *Purchase Summary* screen, return the equipment.

   > ⚠ While this step is optional, refunds *should* be processed only after the equipment on the invoice has been marked as returned. This ensures a clean audit trail.

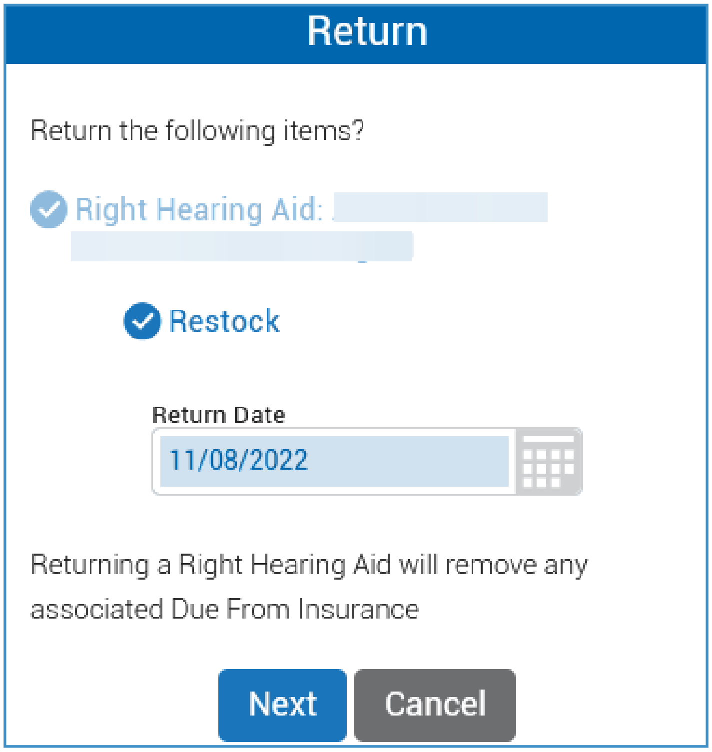
   a. Click **return** on the equipment line of the invoice to open the *Return* dialog screen.

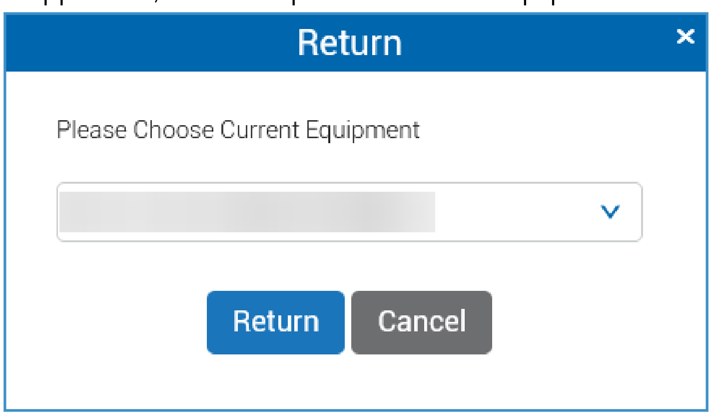
   Invoice Details

Type	Qty	Description	Unit Price	Amount	Order Tracking	Edit	Delete	Actions
Battery	12	13 Audio Energy 4 Pack	$25.54	$306.48		Edit	Delete	Return

   b. In the *Return* dialog screen, verify the items being returned, whether the item(s) should be returned to inventory stock, and the return date.

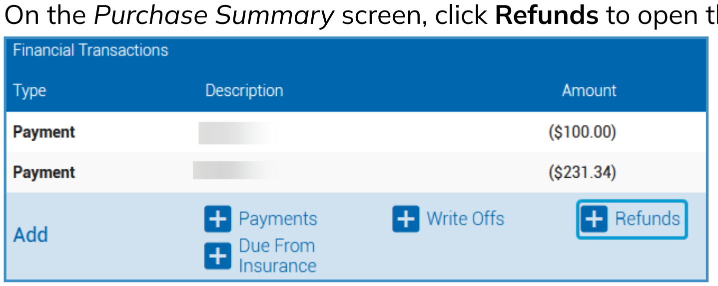


c. Click **Next**.
d. If applicable, select the patient's current equipment or leave as "None."

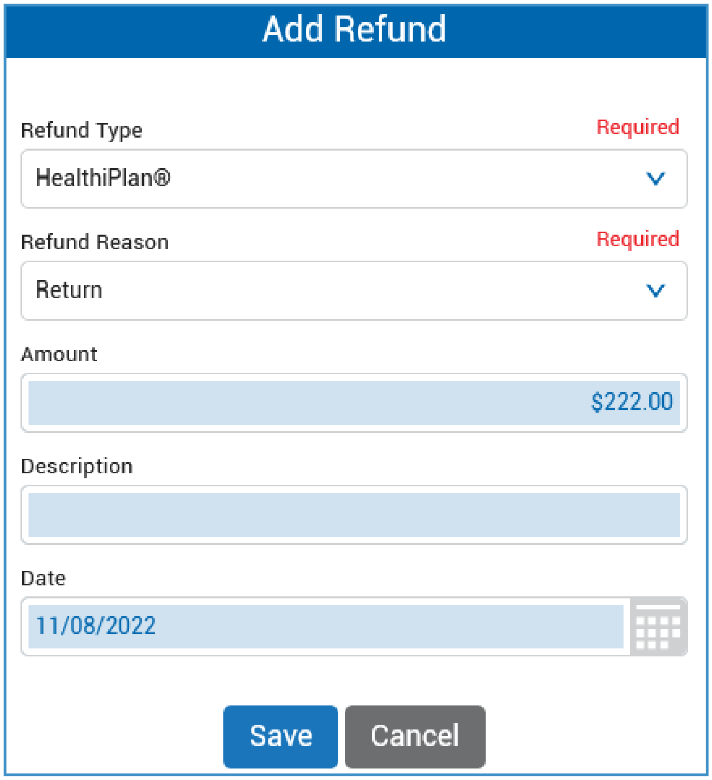


e. Click **Return** to complete the return and to close the *Return* dialog screen.

4. On the *Purchase Summary* screen, click **Refunds** to open the *Add Refund* screen.



5. Complete the fields in the *Add Refund* screen.



a. In the *Refund Type* field, select **HealthiPlan®**.
b. Select an option in the *Refund Reason* field.
c. In the *Amount* field, enter the value of the return.

> This amount can not exceed the amount financed with HealthiPlan®.

d. (Optional) In the *Description* field, enter a **description**.
e. (Optional) If needed, adjust the *Date* field.
f. Click **Save** to close the *Add Refund* screen and return to the *Purchase Summary* screen.

6. On the *Purchase Summary* screen, click **Save**.

Within three business days, the return will be processed, the patient's account will be credited, and the office account will be debited.

If the patient is retaining the equipment that was returned, create a new invoice with the items and process the new payment on that invoice.

Appendix A. Document Revision History

Rev #	Date	Description
2.3	2024-02-28	Updated the *Refunding a HealthiPlan® Credit Account* chapter to remove language that suggested a restriction in the software would not permit processing refunds without making a return, and marked some steps as optional. Added notes and warnings about how processing a refund absent a return is contrary to best practices, and provided guidance on the correct workflows involved.
2.1	2022-12-08	Note added to *Adding External HealthiPlan® Account to Patient Record* and *Reverifying Existing HealthiPlan® Accounts* chapters to reflect new workflow for existing accounts that have been added/ verified in Sycle but show a $0.00 balance (introduced in Sycle Pro 29.19).

2	2022-11-09	Document rewrite, revisions, branding updates.
		• Existing procedures rewritten for clarity.
		• Most images replaced with higher-quality examples.
		• Document branding updated to current format.
		• *Funding a Purchase with HealthiPlan®* chapter updated to include new error message dialog when attempting to save an invoice with an unverified or otherwise invalid HealthiPlan account (introduced in Sycle Pro 29.18).
		• *Adding and Verifying Existing HealthiPlan® Patients* chapter added, containing two subchapters:
		  ◦ *Adding External HealthiPlan® Account to Patient Record* chapter added to reflect new workflows introduced in Sycle Pro 29.18.
		  ◦ *Reverifying Existing HealthiPlan® Accounts* chapter rewritten to reflect new workflows introduced in Sycle Pro 29.18.
		• Steps in *Editing a HealthiPlan® Payment* and *Voiding a HealthiPlan® Payment* chapters no longer use refunds in example images.

1	2022-03-03	