



OTC Hearing Aids

Sycle Pro



November 20, 2023
Revision 1.1

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1. Overview

Over-the-counter (OTC) hearing aids are basic, low-cost, air-conduction hearing aids. These are available without a prescription (or fitting by an audiologist) to individuals 18 years or older with mild to moderate perceived hearing loss.

Managing and selling OTC hearing aids through Cycle Pro provides you with an opportunity to expand your customer base. By offering OTC hearing aids, you can establish your clinic(s) as a reliable resource for the start of new clients' hearing healthcare journey and as an additional option for individuals seeking affordable and accessible hearing amplification.

Even if you do not plan to sell/dispense OTC hearing aids, Cycle Pro allows you to track patients' existing OTC hearing aid equipment for care continuity. This also offers you the opportunity to upgrade their OTC hearing aids to prescription hearing aids as a part of their continued care.

Wherever possible, the methods used for the management and sale of OTC hearing aids in Cycle Pro are kept consistent with the workflows established for the sale of traditional hearing aids. Some notable differences include:

- OTC hearing aids are categorized as their own item type, separate from prescription hearing aids.
- Model names/numbers for OTC hearing aids are entered manually, rather than making a selection from a pre-populated list.
 - The Manufacturer and Type fields are still populated by Cycle at intervals. Users can make a request to Cycle to add missing manufacturers ahead of the scheduled update interval.
- Unlike prescription hearing aids, OTC hearing aids can be sold to walk-in patients without an appointment (in the same manner as batteries or accessories).
 - OTC hearing aids can also be sold at the conclusion of an appointment, just like prescription hearing aids.
- OTC hearing aids are sold as whole "kits." Typically — though not exclusively —, OTC hearing aid kits include hearing aids for both ears and several accessories.
- While OTC hearing aids can be *exchanged* only for other OTC hearing aid kits, they can also be *upgraded* to prescription hearing aids.
- Binaural OTC hearing aid kits can not be exchanged for a single hearing aid, nor exchanged/upgraded for a mix of a prescription hearing aid and an OTC hearing aid.

Clinics must adhere to the FDA guidelines for the sale and distribution of OTC hearing aids.

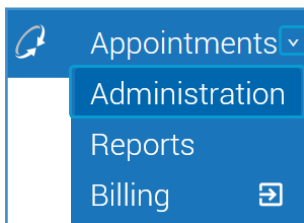
2. Administration Setup

Before they can be added to stock or purchases, OTC hearing aids are first defined in the *Administration* section of Sycle Pro.

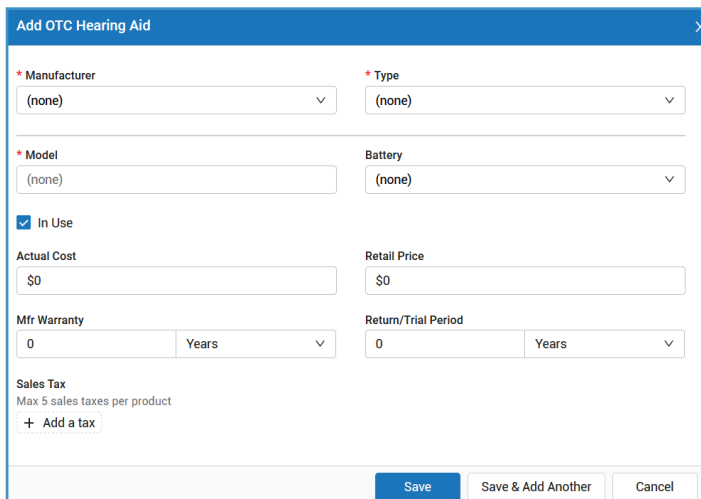
OTC hearing aids are defined on their own setup page on the *Administration* screen (*Purchases* → **OTC Hearing Aids**).

2.1. Add OTC Hearing Aids

- Navigate to the *Administration* screen.
 - Click the arrow in the top-left of the screen. From the dropdown menu, select **Administration**.



- Select *Purchases* → **OTC Hearing Aids**.
- On the *OTC Hearing Aids* screen, click + **Add** to open the *Add OTC Hearing Aid* window.
- Complete the fields in the *Add new OTC hearing aid* window. Mandatory fields are indicated with an asterisk (*).



A screenshot of the 'Add OTC Hearing Aid' window. The window has a blue header with the title 'Add OTC Hearing Aid' and a close button (X). The form contains several fields:

- * Manufacturer**: A dropdown menu with '(none)' selected.
- * Type**: A dropdown menu with '(none)' selected.
- * Model**: A text input field with '(none)' entered.
- Battery**: A dropdown menu with '(none)' selected.
- In Use**: A checkbox that is checked.
- Actual Cost**: A text input field with '\$0' entered.
- Retail Price**: A text input field with '\$0' entered.
- Mfr Warranty**: A text input field with '0' and a 'Years' dropdown menu.
- Return/Trial Period**: A text input field with '0' and a 'Years' dropdown menu.
- Sales Tax**: A section with the text 'Max 5 sales taxes per product' and a '+ Add a tax' button.

 At the bottom of the window are three buttons: 'Save', 'Save & Add Another', and 'Cancel'.

- Manufacturer:** Select one of the OTC hearing aid manufacturers from the list.
- Type:** Select the type of OTC hearing aid from the list.
- Model:** Enter the OTC hearing aid's model. As Sycle does not manage a list of OTC hearing aid models, the model must be entered manually.



Duplicate model identifiers can not be used for the same manufacturer.

- **Battery:** Select the battery used by the OTC hearing aid from the list.



While this is an optional field when adding OTC hearing aids, a battery *must* be selected when selling an OTC hearing aid. Sycle recommends adding the battery at this stage whenever possible.



If the battery is not available in this list, you can add the battery in *Administration* → *Batteries*.

- **In Use:** When enabled, marks the OTC hearing aid as available for use in the clinic.
- **Actual Cost:** The cost of the OTC hearing aid to the clinic. Setting the actual cost allows you to track the gross margin of your OTC hearing aids.



Actual costs will never appear on a patient's invoice.

- **Retail Price:** The retail price of the OTC hearing aid. This is used to populate the price on invoices.
- **Mfr Warranty:** The length of the manufacturer's warranty. Enter a number and select either Years, Months, or Days.
- **Return/Trial Period:** The return or trial period that your clinic offers for the OTC hearing aid. Enter a number and select either Years, Months, or Days.



Clinics typically set — but are not limited to setting — this period to coincide with the manufacturer's return period. This allows the clinic to return the OTC hearing aid to the manufacturer after accepting a return from a patient.

- **Sales Tax:** Select the tax or taxes to apply to this OTC hearing aid. Click **+ Add a Tax** and select a tax rate from the list. Repeat to add additional taxes (up to five in total).

5. Do one of the following:

- To save and return to the *OTC Hearing Aids* screen, click **Save**.
- To save and re-open the *Add new OTC hearing aid* window, click **Save & Add Another**.



You can download a spreadsheet (.xlsx) of your OTC hearing aids by clicking the **Download** button at the top of the *OTC Hearing Aids* screen.

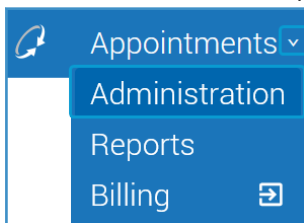
2.1.1. Copy OTC Hearing Aids to Clinics

You can copy OTC hearing aids from one clinic to other clinics. For example, you might add all your OTC hearing aids at one clinic, then copy the list — in whole or in part — to your other clinic(s).



You can download a spreadsheet (.xlsx) of your OTC hearing aids by clicking the **Download** button at the top of the the *OTC Hearing Aids* screen.

1. Navigate to the *Administration* screen.
 - Click the arrow in the top-left of the screen. From the dropdown menu, select **Administration**.



2. Select *Purchases* → **OTC Hearing Aids**.
3. On the *OTC Hearing Aids* screen, select the OTC hearing aids to copy.

OTC Hearing Aids

Search the table... 5 entries

Edit Delete Copy to another clinic

<input checked="" type="checkbox"/>	Manufacturer	Type	Model	In Use	Actual Cost	Retail Price
<input checked="" type="checkbox"/>	AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$33.00	\$1.00
<input checked="" type="checkbox"/>	ADVANCED	BTE	OTC Advanced	<input checked="" type="checkbox"/>	\$3.00	\$13.00
<input checked="" type="checkbox"/>	Widex	BA	Wegonator	<input checked="" type="checkbox"/>	\$2.00	\$22.00
<input checked="" type="checkbox"/>	Widex	BTE	Into	<input checked="" type="checkbox"/>	\$3.00	\$333.00
<input checked="" type="checkbox"/>	Reston	BTE	OTC MODEL ONE	<input checked="" type="checkbox"/>	\$2,999.00	\$2,999.00

4. Click **Copy to another clinic** to open the *Copy OTC hearing aids to...* window.

OTC Hearing Aids

Search the table... 5 entries

Edit Delete Copy to another clinic

Copy to another clinic

<input checked="" type="checkbox"/>	Manufacturer	Type	Model	In Use	Actual Cost	Retail Price
<input checked="" type="checkbox"/>	AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$33.00	\$1.00
<input checked="" type="checkbox"/>	ADVANCED	BTE	OTC Advanced	<input checked="" type="checkbox"/>	\$3.00	\$13.00
<input checked="" type="checkbox"/>	Widex	BA	Wegonator	<input checked="" type="checkbox"/>	\$2.00	\$22.00
<input checked="" type="checkbox"/>	Widex	BTE	Into	<input checked="" type="checkbox"/>	\$3.00	\$333.00
<input checked="" type="checkbox"/>	Reston	BTE	OTC MODEL ONE	<input checked="" type="checkbox"/>	\$2,999.00	\$2,999.00

- In the *Copy OTC hearing aids to...* window, select the clinic(s) to which you want to copy the OTC hearing aids. Click **Next**.

You can filter the list of clinics by selection a **Region** and/or by using the **Search** field.

- On the second section of the *Copy OTC hearing aids to...* window, review and select the appropriate options.

- Include sales tax:** Enable this flag to copy any sales tax information on the OTC hearing aids. Leave disabled to copy the OTC hearing aids without any sales tax assignments.

- **Delete all existing OTC hearing aids in selected clinics:** Enable this flag to delete existing OTC hearing aids in the destination clinic(s). Leave disabled to retain existing OTC hearing aids in the destination clinics.

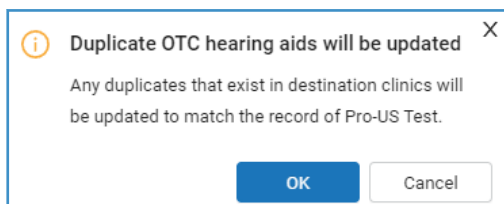


When this flag is enabled, all OTC hearing aids that currently exist in the destination clinic(s) will be deleted. (This does not affect previous invoices.)

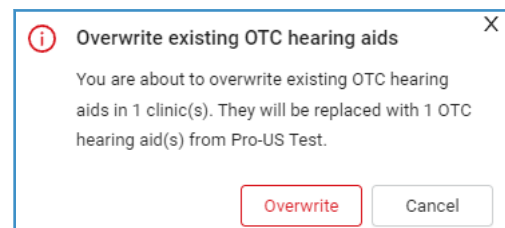


When this flag is disabled, any OTC hearing aids that were selected in [Step 3](#) that already exist in the destination clinic(s) will have their information overwritten by the record being copied over.

7. Click **Copy and finish**.
8. Depending on whether the **Delete all existing OTC hearing aids in selected clinics** flag was left disabled or was enabled in [Step 6](#), one of the following confirmation windows will appear. Review the message, then click **OK** or **Overwrite** to complete the copying process.

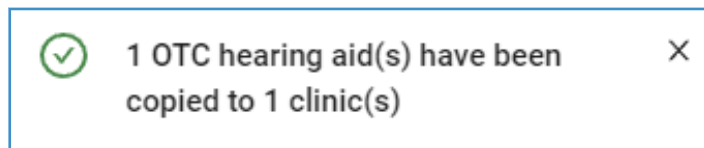


Left: Flag is disabled.



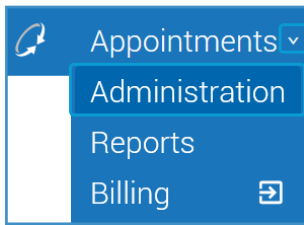
Right: Flag is enabled.

When the process completes, a confirmation message will appear on the *OTC Hearing Aids* screen.



2.2. Edit OTC Hearing Aids

- Navigate to the *Administration* screen.
 - Click the arrow in the top-left of the screen. From the dropdown menu, select **Administration**.



- Select *Purchases* → **OTC Hearing Aids**.
- On the *OTC Hearing Aids* screen, select the OTC hearing aid(s) to edit.

A screenshot of the 'OTC Hearing Aids' table. The table has columns for 'Manufacturer', 'Type', 'Model', 'In Use', 'Actual Cost', and 'Retail Price'. Five rows are visible, each with a checked checkbox in the first column. A blue circle highlights the first three rows. At the top right of the table, there are buttons for 'Edit', 'Delete', and 'Copy to another clinic'.

Manufacturer	Type	Model	In Use	Actual Cost	Retail Price
AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$33.00	\$1.00
ADVANCED	BTE	OTC Advanced	<input checked="" type="checkbox"/>	\$3.00	\$13.00
Widex	BA	Wegonator	<input checked="" type="checkbox"/>	\$2.00	\$22.00
Widex	BTE	Into	<input checked="" type="checkbox"/>	\$3.00	\$333.00
Reston	BTE	OTC MODEL ONE	<input checked="" type="checkbox"/>	\$2,999.00	\$2,999.00



When multiple items are selected, the **Manufacturer**, **Type**, and **Model** fields can not be edited. To edit these fields, select one item.

- Click **Edit** to open the *Edit OTC Hearing Aid* window.

A screenshot of the 'OTC Hearing Aids' table. The table has columns for 'Manufacturer', 'Type', 'Model', 'In Use', and 'Actual Cost'. Four rows are visible. The 'Edit' button at the top right of the table is circled in blue. The first row is selected with a checked checkbox.

Manufacturer	Type	Model	In Use	Actual Cost
AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$33.00
ADVANCED	BTE	OTC Advanced	<input type="checkbox"/>	\$3.00
Widex	BA	Wegonator	<input type="checkbox"/>	\$2.00
Widex	BTE	Into	<input type="checkbox"/>	\$3.00

- Complete the fields in the *Edit OTC Hearing Aid* window. Mandatory fields are indicated with an asterisk (*).

- **Manufacturer:** Select one of the OTC hearing aid manufacturers from the list.
- **Type:** Select the type of OTC hearing aid from the list.
- **Model:** Enter the OTC hearing aid's model. As Sycle does not manage a list of OTC hearing aid models, the model must be entered manually.



Duplicate model identifiers can not be used for the same manufacturer.



When multiple items are selected, the **Manufacturer**, **Type**, and **Model** fields can not be edited. To edit these fields, select one item in [Step 3](#).

- **Battery:** If applicable, select the battery used by the OTC hearing aid from the list.
- **In Use:** When enabled, marks the OTC hearing aid as available for use in the clinic.
- **Actual Cost:** The cost of the OTC hearing aid to the clinic. Setting the actual cost allows you to track the gross margin of your OTC hearing aids.



Actual costs will never appear on a patient's invoice.

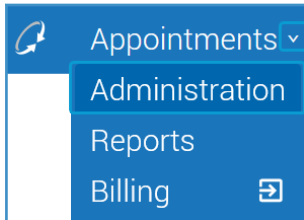
- **Retail Price:** The retail price of the OTC hearing aid. This is used to populate the price on invoices.
- **Mfr Warranty:** The length of the manufacturer's warranty. Enter a number and select either Years, Months, or Days.
- **Return/Trial Period:** The return or trial period set by the manufacturer. Enter a number and select either Years, Months, or Days.
- **Sales Tax:** Select the tax or taxes to apply to this OTC hearing aid. Click **+ Add a Tax** and select a tax rate from the list. Repeat to add additional taxes (up to five in total).

6. To save and return to the *OTC Hearing Aids* screen, click **Save**.

2.2.1. Activate or Deactivate OTC Hearing Aids

You can quickly mark an OTC hearing aid as "in use" or mark it as "not in use" from the OTC Hearing Aids screen.

1. Navigate to the *Administration* screen.
 - Click the arrow in the top-left of the screen. From the dropdown menu, select **Administration**.



2. Select *Purchases* → **OTC Hearing Aids**.
3. Locate the item(s). You can use the search bar to filter the item(s).
4. For each item, toggle the **In Use** field to either mark the item as **in use** (🔘) or **not in use** (🔘).

 A screenshot of the "OTC Hearing Aids" table in a software application. The table has columns for Manufacturer, Type, Model, Actual Cost, and Retail Price. The "In Use" column is circled in blue, and each row has a toggle switch. The table contains 5 entries.

	Manufacturer	Type	Model	In Use	Actual Cost	Retail Price
<input type="checkbox"/>	AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$3.00	\$1.00
<input type="checkbox"/>	ADVANCED	BTE	OTC Advanced	<input checked="" type="checkbox"/>	\$0.00	\$13.00
<input type="checkbox"/>	Widex	BA	Wegonator	<input checked="" type="checkbox"/>	\$0.00	\$22.00
<input type="checkbox"/>	Widex	BTE	Into	<input checked="" type="checkbox"/>	\$3.00	\$333.00
<input type="checkbox"/>	Reston	BTE	OTC MODEL ONE	<input checked="" type="checkbox"/>	\$2,999.00	\$2,999.00



You can copy the status of OTC hearing aids to other clinics. Refer to [Copy OTC Hearing Aids to Clinics, page 4](#).

2.3. Delete OTC Hearing Aids

- Navigate to the *Administration* screen.
 - Click the arrow in the top-left of the screen. From the dropdown menu, select **Administration**.



- Select *Purchases* → **OTC Hearing Aids**.
- On the *OTC Hearing Aids* screen, select the OTC hearing aids to delete.

OTC Hearing Aids

Search the table... 5 entries

Edit Delete Copy to another clinic

<input checked="" type="checkbox"/>	Manufacturer	Type	Model	In Use	Actual Cost	Retail Price
<input checked="" type="checkbox"/>	AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$33.00	\$1.00
<input checked="" type="checkbox"/>	ADVANCED	BTE	OTC Advanced	<input checked="" type="checkbox"/>	\$3.00	\$13.00
<input checked="" type="checkbox"/>	Widex	BA	Wegonator	<input checked="" type="checkbox"/>	\$2.00	\$22.00
<input checked="" type="checkbox"/>	Widex	BTE	Into	<input checked="" type="checkbox"/>	\$3.00	\$333.00
<input checked="" type="checkbox"/>	Reston	BTE	OTC MODEL ONE	<input checked="" type="checkbox"/>	\$2,999.00	\$2,999.00

- Click **Delete**.

OTC Hearing Aids

Search the table... 5 entries

Edit Delete Copy to another clinic

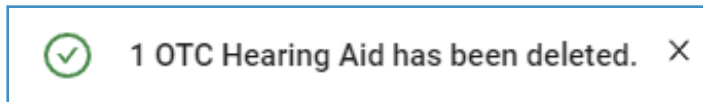
<input type="checkbox"/>	Manufacturer	Type	Model	In Use	Actual Cost	Retail Price
<input checked="" type="checkbox"/>	AccuQuest	BTE	Testinator	<input checked="" type="checkbox"/>	\$33.00	\$1.00
<input type="checkbox"/>	ADVANCED	BTE	OTC Advanced	<input checked="" type="checkbox"/>	\$3.00	\$13.00
<input type="checkbox"/>	Widex	BA	Wegonator	<input checked="" type="checkbox"/>	\$2.00	\$22.00
<input type="checkbox"/>	Widex	BTE	Into	<input checked="" type="checkbox"/>	\$3.00	\$333.00

- In the *Delete OTC Hearing Aid* window, click **Delete**.

Delete OTC Hearing Aid X

Are you sure you want to delete this OTC Hearing Aid? This action cannot be undone.

When the process completes, a confirmation message will appear on the *OTC Hearing Aids* screen.



You can delete the items at your other clinics by copying your entire OTC hearing aid list to those clinics with the **Delete all existing OTC hearing aids in selected clinics** flag enabled. Refer to [Copy OTC Hearing Aids to Clinics, page 4](#). Ensure you review the warnings related to this flag.

3. Manage OTC Hearing Aid Inventory

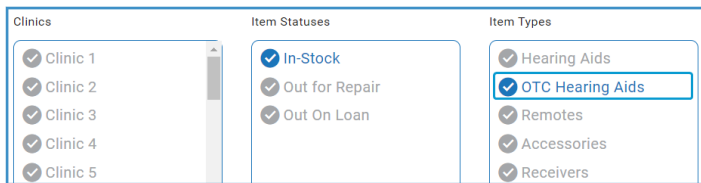
Inventory management for OTC hearing aids is similar to the inventory management process used for prescription hearing aids. To keep them distinct from prescription hearing aids, OTC hearing aids are categorized as their own item type on the In-Stock Management and Order Tracking screens.

3.1. View OTC Hearing Aids Inventory

- Navigate to the *In-Stock Management* screen.
 - On the *Appointments* screen, select *Inventory* → **In-Stock Management**.



- On the *In-Stock Management* screen, select *Item Types* → **OTC Hearing Aids** to display only OTC hearing aids.

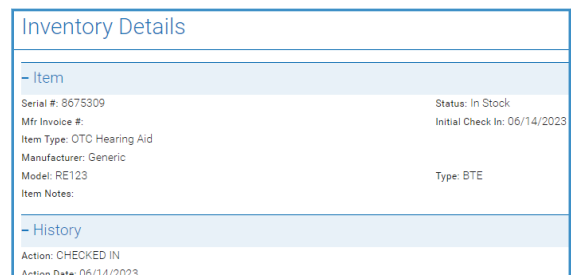
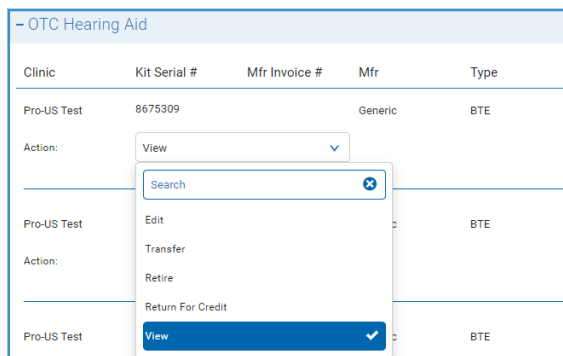


- If needed, filter the list further by making additional selections in the *Clinics* field or by entering a value in the *Search* field.



In-Stock is the only valid selection in the *Item Statuses* field for OTC devices, as they can not be sent out for repairs or be on loan.

- If needed, you can view an individual OTC hearing aid's details and history by selecting **Action+View** to open the *Inventory Details* window.

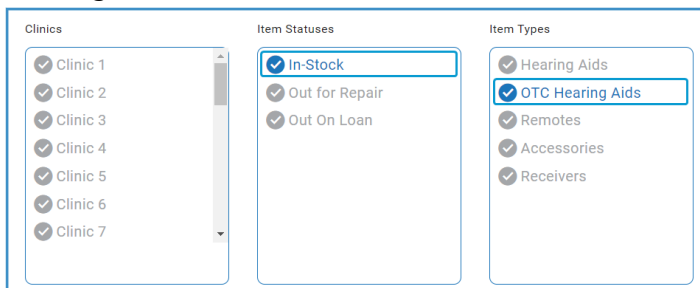


3.2. Add OTC Hearing Aids to In-Stock Inventory

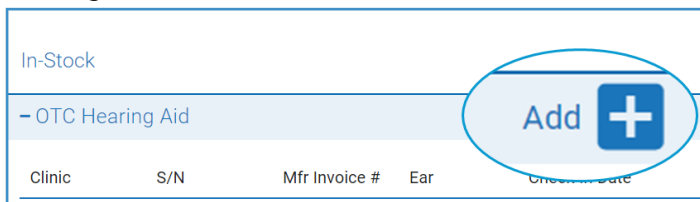
- Navigate to the *In-Stock Management* screen.
 - On the *Appointments* screen, select *Inventory* → **In-Stock Management**.



- On the *In-Stock Management* screen, select *Item Statuses* → **In-Stock** and *Item Types* → **OTC Hearing Aids**.



- Under *In-Stock* → *OTC Hearing Aid*, click **Add** to open the *In-Stock Inventory Item (Add OTC Hearing Aid)* screen.



- Complete the fields on the *In-Stock Inventory Item (Add OTC Hearing Aid)* screen. Some important or novel fields are defined below.
 - OTC Hearing Aid:** Select an OTC hearing aid. This field contains the in-use OTC hearing aids defined on the *OTC Hearing Aids* administration screen (see [Administration Setup, page 2](#)).



The **Manufacturer**, **Model**, and **Type** fields can only be populated by making a selection in the **OTC Hearing Aid** field.

The **Mfr Warranty**, **Battery Type**, **Return/Trial Period**, **Actual Cost**, and **Retail Price** fields are automatically populated with the selections in for those fields for the OTC hearing aid in the *OTC Hearing Aids* administration screen.

- Kit Serial #:** Enter a serial number or multiple serial numbers for the OTC hearing aid package(s) / kit(s). Serial numbers are used to identify the kit(s). Typically, each kit has its own serial number. Separate multiple serial numbers by a comma or newline. When you enter more than one serial number, the **Left Ear Device Serial #**, **Right Ear Device Serial #**, and **Charger/Case Serial #** fields are disabled because you're entering multiple devices into stock. If you want to track these serial numbers, enter one kit at a time.



Unlike other hearing aids, identifying OTC hearing aids is done primarily via the **Kit Serial #**. This is due to OTC hearing aids typically being returned or exchanged as a whole kit, whereas other hearing aids are usually serviced on the competent level.

- **Kit Content:** Enter any notes about the kit contents that are not covered by the other fields.
5. Click **Save** to add the OTC hearing aids to inventory.
- If you entered multiple **Kit Serial #**, you are prompted to review the list of serial numbers. Review the list, then click **Save** to add the OTC hearing aids to inventory.

In-Stock Inventory Item
✕

You have entered multiple serial numbers. Please preview below and click save to commit.

OTC Hearing Aid

Kit Serial #	Manufacturer	Type	Model
8541754139	Bruckhoff	BTE	EarSafe II
8541754140	Bruckhoff	BTE	EarSafe II

Save
Cancel

The OTC hearing aids are now in stock.

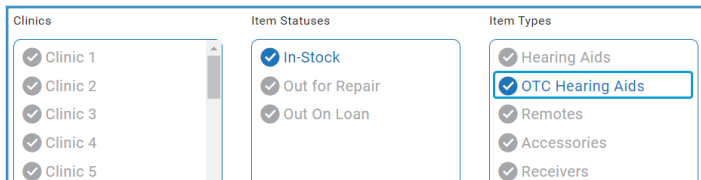
In-Stock						
- OTC Hearing Aid						Add +
Clinic	Kit Serial #	Mfr Invoice #	Mfr	Type	Model	Check-In Date
Pro-US Test	8675309		Generic	BTE	RE123	06/14/2023
Action: Select One ▾						
Pro-US Test	8675308		Generic	BTE	RE123	06/14/2023
Action: Select One ▾						

3.3. Edit In-Stock OTC Hearing Aids

- Navigate to the *In-Stock Management* screen.
 - On the *Appointments* screen, select *Inventory* → **In-Stock Management**.



- On the *In-Stock Management* screen, select *Item Types* → **OTC Hearing Aids** to display only OTC hearing aids.

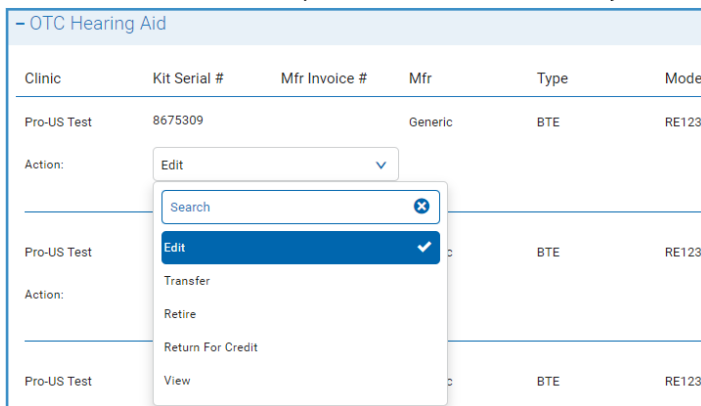


- If needed, filter the list further by making additional selections in the *Clinics* field or by entering a value in the *Search* field.



In-Stock is the only valid selection in the *Item Statuses* field for OTC devices, as they can not be sent out for repairs or be on loan.

- Select *Action* → **Edit** to open the *In-Stock Inventory Item (Edit OTC Hearing Aid)* screen.



- Complete the fields on the *In-Stock Inventory Item (Edit OTC Hearing Aid)* screen.



Do *not* enter commas, newlines, or multiple serial numbers in the **Kit Serial #** field when editing OTC hearing aids. If you want to enter multiple devices into stock, refer to [Add OTC Hearing Aids to In-Stock Inventory, page 13](#).

- Click **Save**.

4. Administer Patients' OTC Hearing Aids

Your clinic may or may not dispense OTC hearing aids. Even if you do not dispense OTC hearing aids, you might want to track patients' OTC hearing aid equipment.

Sycle Pro offers you the ability to add OTC hearing aids to a patient's equipment record by:

- importing the patient's existing OTC hearing aid kit
- creating an invoice without an appointment
- as a part of an appointment outcome

Whether imported to a patient record or sold to the patient by the clinic, a patient's OTC hearing aids are listed on the *Patient Summary* screen (*Equipment* → *Current hearing aids*).



All methods used to add OTC hearing aids to patient records require the OTC hearing aid kit to be configured in the system prior to import/purchase. Refer to [Administration Setup, page 2](#) for instructions.

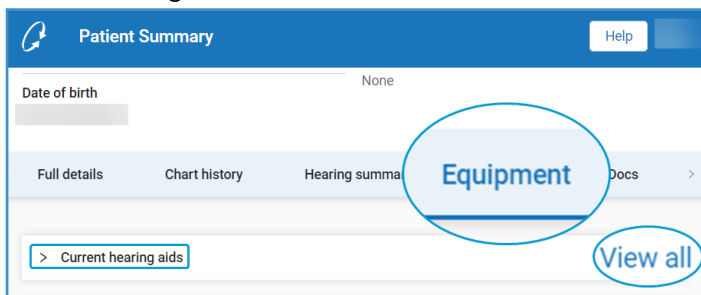
4.1. Import OTC Hearing Aids

You can add OTC hearing aids to a patient without creating a purchase. This might be done for a patient who purchased their OTC hearing aid kit outside the clinic.

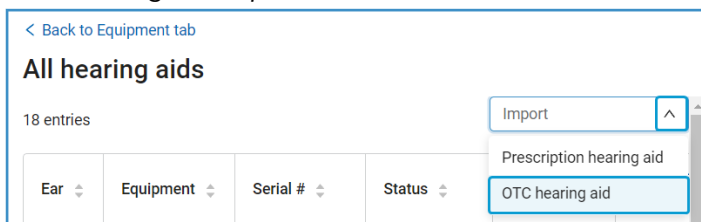


Imported OTC hearing aids can be edited, repaired, and upgraded.

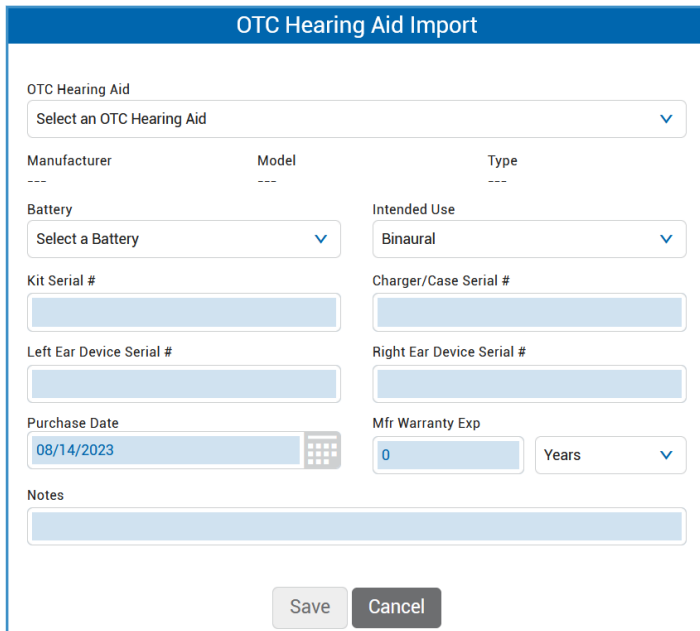
1. Navigate to the *Patient Summary* screen.
 - a. Enter the patient's full or partial name in the **Patient** field. Use the **Enter/Return** key or click the Patient Search icon (👤) to search for the patient's record.
 - b. Review the search results and click the patient's name to open the **Patient Summary**.
2. On the *Patient Summary* screen, navigate to *Equipment* → *Current hearing aids* → **View All** to open the *All hearing aids* screen.



3. On the *All hearing aids* screen, select **Import** → **OTC hearing aid** to open the *Purchase Summary* → *OTC Hearing Aid Import*



- Complete the fields on the *Purchase Summary* → *OTC Hearing Aid Import* screen. Some important or novel fields are defined below.



- **OTC Hearing Aid:** Select an OTC hearing aid. This field contains the in-use OTC hearing aids defined on the *OTC Hearing Aids* administration screen (see [Administration Setup, page 2](#)).



The **Manufacturer**, **Model**, and **Type** fields can only be populated by making a selection in the **OTC Hearing Aid** field.

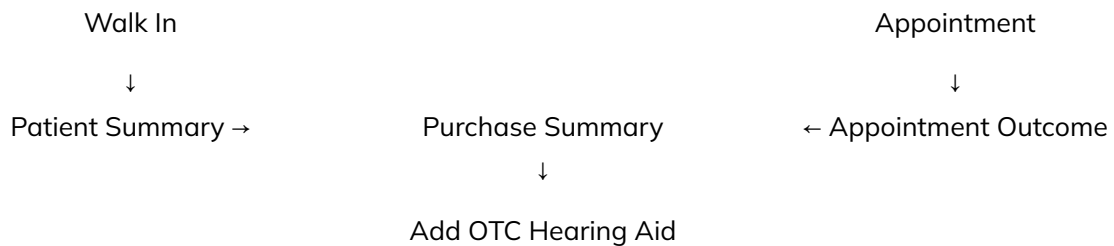
- **Kit Serial #:** If applicable or available, optionally enter a serial number for the OTC hearing aid package / kit. Serial numbers are used to identify the kit. Typically, each kit has its own serial number.
 - **Notes:** Enter any details that are not covered by the other fields.
- Click **Save**.

After importing the OTC hearing aid, you are redirected to the *Patient Summary* → *Equipment* tab.

4.2. Sell OTC Hearing Aids

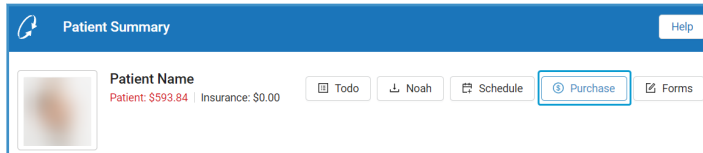
An OTC hearing aid can be sold at the conclusion of an appointment, just like other hearing aids.

Unlike hearing aids that require programming by a specialist, OTC hearing aids can also be sold *without* an appointment (in the same manner as batteries or accessories).

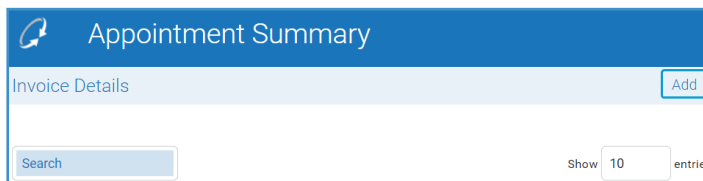


1. Do one of the following to open the *Purchase Summary* screen:

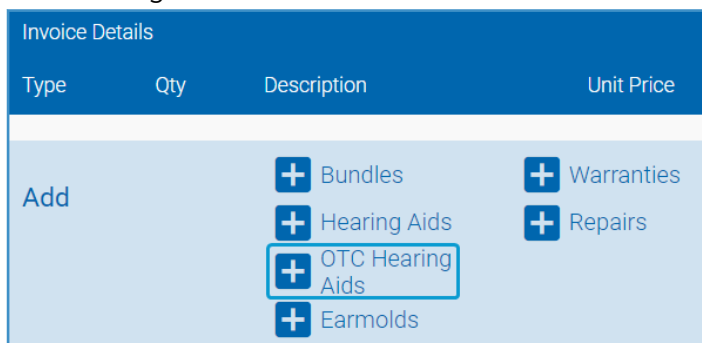
- For **walk-ins**: On the *Patient Summary* screen, click **Purchase**.



- For **appointments**: On the *Appointment Summary* screen, navigate to and select *Invoice Details* → **Add**.



2. On the *Purchase Summary* screen, select *Invoice Details* → **Add** → **+ OTC Hearing Aids** to open the *OTC Hearing Aid Purchase* window.



- Complete the fields in the *OTC Hearing Aid Purchase* window and click **Save**.
 - If the device is in stock, select the device in the **In-Stock** field.



Multiple fields may be automatically populated after making a selection in the **In-Stock** field. Some of those pre-populated fields (including the serial number fields) can not be edited on the *OTC Hearing Aid Purchase* screen (as the device is already checked in).

- If the device is *not* in stock, select an OTC hearing aid in the **OTC Hearing Aid** field.

- Review the OTC hearing aid in the *Invoice Details* section of the *Purchase Summary* screen.

Invoice Details						
Type	Qty	Description	Unit Price	Amount	Order Tracking	
Binaural OTC Hearing Aid	1	Generic RE123 BTE Kit Serial #: 8675308 Mfr Warranty Exp: 06/18/2024 Return/Trial Period: 07/19/2023	\$139.00	\$139.00	06/19/2023	



If the device was not in stock and needs to be checked in, you can do this now or upon the device's arrival / delivery. See [Check In and Deliver an OTC Hearing Aid, page 21](#).

- Complete any remaining work on the *Purchase Summary* screen (such as adding payments). If needed, click **Save** and **Close** to return to the *Patient Summary* or *Appointment Summary* screen.




If the OTC hearing aid is not the patient's primary device (e.g. sold as a backup), you can change the status of the OTC hearing aid to reflect this. Refer to [Change a Patient's OTC Hearing Aid Status, page 25](#).

4.3. Check In and Deliver an OTC Hearing Aid

If an OTC hearing aid was added to a *Purchase Summary* but was not in stock or delivered to the patient at the time of the order, you can check in and deliver the device from either *Purchase Summary* or *Order Tracking*.

4.3.1. Purchase Summary

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 *Finance* → *Invoices* and click the **date** for the appropriate invoice to open the *Purchase Summary* screen.

Date	Grand total	Due from insurance	Due from patient	Invoice #	PO #
05/19/2023	\$333.23	\$0.00	\$333.23	5342	



You can filter this list of invoices by clicking **View purchases by type** and selecting **OTC Hearing Aid** in the **Type** field.



If you are checking in a repaired device ([Repair an OTC Hearing Aid, page 29](#)), you can also open the *Purchase Summary* screen by navigating to *Patient Summary* → *Equipment* → *Repairs* and clicking the **date**.

3. On the *Purchase Summary* screen, navigate to *Invoice Details* and locate the device to check in.
4. Select *Order Tracking* → **Check In** to open the *Check-In* window.

Type	Qty	Description	Unit Price	Amount	Order Tracking	Edit	Delete	Actions
Binaural OTC Hearing Aid	1	Generic RE123 BTE Mfr Warranty Exp: 05/18/2024 Return/Trial Period: 07/19/2023	\$139.00	\$139.00	Check In	Edit	Delete	



If the device has already been checked in and just needs to be delivered, skip this step and proceed to [Step 6](#).

5. Complete the fields in the *Check-In* window and click **Save**.

Check-In window for new OTC hearing aids

Check-In window for repaired OTC devices

- To mark the device as delivered, click the check mark.

Invoice Details						
Type	Qty	Description	Unit Price	Amount	Order Tracking	
Binaural OTC Hearing Aid	1	Generic RE123 BTE Kit Serial #: 86753011 Mfr Warranty Exp: 06/18/2024 Return/Trial Period: 07/19/2023	\$139.00	\$139.00	06/19/2023	

- In the *Confirm Delivered* window, click **Yes**.

- Click **Save** and **Close** to return to the *Patient Summary* screen.



If the OTC hearing aid is not the patient's primary device (e.g. sold as a backup), you can change the status of the OTC hearing aid to reflect this. Refer to [Change a Patient's OTC Hearing Aid Status, page 25](#).

4.3.2. Order Tracking



If the device has already been checked in and just needs to be delivered, skip ahead to [Step 5](#).

1. Open the *Order Tracking* screen.
 - On the *Appointments* screen, select *Inventory* → **Out to Manufacturer** or **In From Manufacturer**.
2. On the *Order Tracking* screen, select *Item Statuses* → **Check-In** and *Item Types* → **OTC Hearing Aids**.

The screenshot shows three filter panels:

- Clinics:** A list of seven clinics (Clinic 1 through Clinic 7), each with a checked checkbox.
- Item Statuses:** Three options: 'Check-In' (checked), 'To Be Delivered', and 'Out On Loan'.
- Item Types:** Five options: 'Hearing Aids', 'OTC Hearing Aids' (checked), 'Remotes', 'Accessories', and 'Receivers'.

3. Locate the order. Fill in the fields and click **In From Manufacturer**.

The screenshot shows the order details form for an OTC Hearing Aid. The 'In From Manufacturer' button is highlighted. The form includes the following fields:

Clinic	Patient	Patient ID	Purchase Date	Mfr	Model	Type
Pro-US Test	PFS 1310	208	07/26/2023	Bruckhoff	EarSafe II	BTE

Additional fields include:

- Kit Serial #** and **Mfr Invoice #** (text input fields)
- Check-In Date** (calendar picker, value: 08/14/2023)
- Mfr Warranty Exp** (calendar picker)
- Kit Content** (text input field)
- Actual Cost** (text input field, value: \$35.00)
- Return/Trial Exp** (calendar picker)
- Left Ear Device Serial #** and **Right Ear Device Serial #** (text input fields)
- Charger/Case Serial #** (text input field)
- Notes** (text input field)

4. Click **Save**.
5. On the *Order Tracking* screen, select *Item Statuses* → **To Be Delivered** and *Item Types* → **OTC Hearing Aids**.

The screenshot shows three filter panels:

- Clinics:** A list of seven clinics (Clinic 1 through Clinic 7), each with a checked checkbox.
- Item Statuses:** Three options: 'Check-In', 'To Be Delivered' (checked), and 'Out On Loan'.
- Item Types:** Seven options: 'Hearing Aids', 'OTC Hearing Aids' (checked), 'Earmolds', 'Receivers', 'Remotes', 'Accessories', and 'Patient Repairs'.

6. Locate the order. Fill in the fields and click **Delivered To Patient**.

Clinic	Patient	Patient ID	Purchase Date	Mfr	Model	Type
Pro-US Test	John #####	###	07/24/2023	#####	#####	Compact Power BTE
<input checked="" type="button" value="Delivered To Patient"/>						
Kit Serial # 23479234	Charger/Case Serial #		Delivery Date 08/14/2023		Mfr Warranty Exp 07/24/2023	
Left Ear Device Serial #	Right Ear Device Serial #		Return/Trial Exp 08/14/2023			
Check-in Date 07/24/2023	Mfr Invoice #					
Notes						

7. Click **Save**.

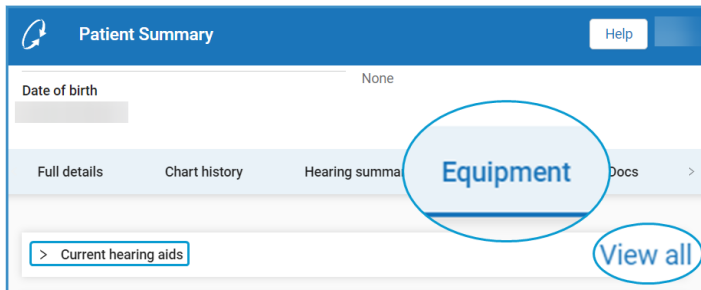


If the OTC hearing aid is not the patient's primary device (e.g. sold as a backup), you can change the status of the OTC hearing aid to reflect this. Refer to [Change a Patient's OTC Hearing Aid Status, page 25](#).

4.4. Change a Patient's OTC Hearing Aid Status

Like other types of hearing aids, you can change the status of a patient's OTC hearing aids from (and to) Current, Backup, or Not In Use.

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 *Equipment* → *Current hearing aids* → **View All** to open the *All hearing aids* screen.



3. On the *All hearing aids* screen, locate the OTC hearing aid.
4. Click the button in the **Status** column (**Current**, **Backup**, or **Not In Use**) and select the desired status.

All hearing aids				
19 entries				
Ear	Equipment	Serial #	Status	Purchase date
Binaural	OTC Generic RE123 BTE	8675305 (kit)	Current ^	06/15/2023
Right	AccuQuest PC7 CP, VC PS DB Digital BTE	84618463548	Current Backup Not In ...	10/02/2022



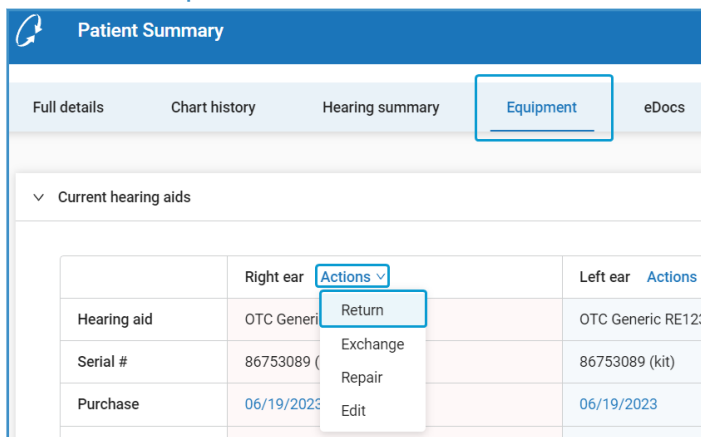
Devices with a status of **Returned** can not be adjusted.

5. Post-Purchase Services for OTC Hearing Aids

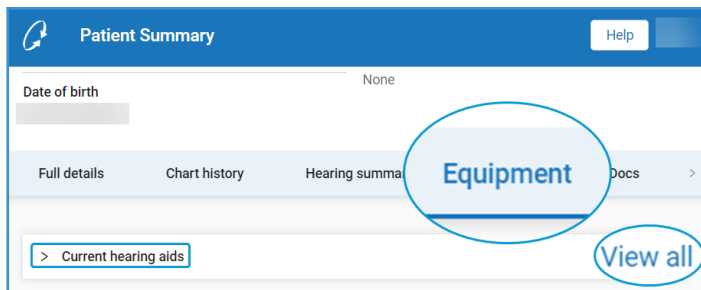
Like other hearing aid types, OTC hearing aids purchased at a clinic can be returned or repaired at that clinic. OTC hearing aids can also be exchanged for other OTC hearing aid kits, or upgraded to prescription hearing aids.

5.1. Return an OTC Hearing Aid

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 *Equipment* → *Current hearing aids*.
3. Do one of the following:
 - If the OTC hearing aid is listed as the patient's current equipment, select *Actions* → **Return**. Proceed to [Step 5](#).



- If the OTC hearing aid is not the patient's current equipment, select **View all**. Locate the OTC hearing aid and click the date in the *Purchase date* column. Proceed to [Step 4](#).



< Back to Equipment tab

All hearing aids

21 entries

Ear	Equipment	Serial #	Status	Purchase date	Purchase price
Right	Ear Q Ear Q / Audio D Digital CIC	22369	Backup	07/18/2022	\$2,547.98

- On the *Purchase Summary* screen, navigate to *Invoice Details* and select *Action* → **Return** for the OTC hearing aid.

Invoice Details

Type	Qty	Description	Unit Price	Amount	Order Tracking	Edit	Delete	Actions
Binaural OTC Hearing Aid	1	Generic RE123 BTE Kit Serial #: 86733089 Mfr Warranty Exp: 06/18/2024 Return/Trial Period: 09/17/2023	\$139.00	\$139.00	06/19/2023	Edit	Delete	Return

- In the *Return* dialog screen, verify the item being returned and the return date. Click **Next**.

Return

Return the following items?

- Binaural OTC Hearing Aid: Generic RE123 BTE

Return Date

06/20/2023

Returning a Binaural OTC Hearing Aid will remove any associated Due From Insurance

- If the item being returned was the patient's current equipment and the patient has backup equipment available, the *Current Equipment* window appears. In the *Current Equipment* window, select the backup equipment to become the patient's new current equipment, then click **Save**.

Current Equipment

Please Choose Current Equipment

Left Ear

Generic - RE123 BTE (Binaural) ▼

Right Ear

Generic - RE123 BTE (Binaural) ▼

Save **Cancel**

The OTC hearing aid is marked as returned. You can now balance the invoice and exit the *Purchase Summary* screen.

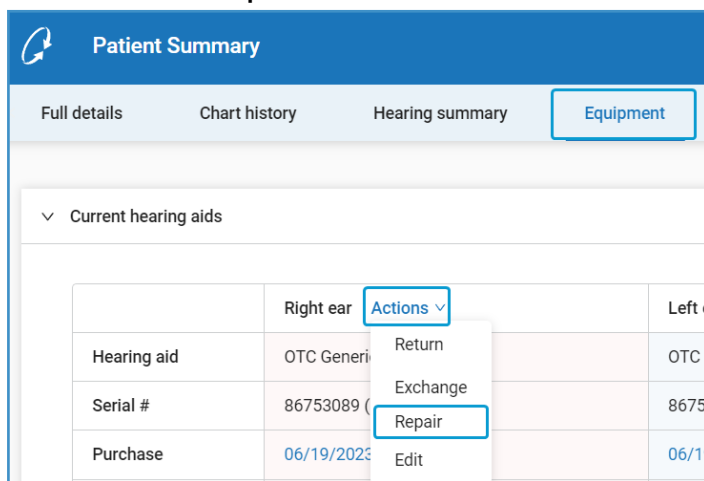
5.2. Repair an OTC Hearing Aid

Repairs can be started from *Patient Summary* → *Equipment* → *Current hearing aids* (current equipment only) or by creating a new invoice (any of the patient's equipment eligible for repair).

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. Do one of the following:
For current equipment:

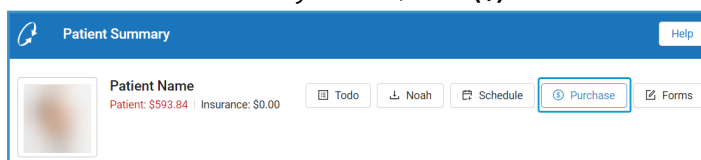
- a. On the *Patient Summary* screen, navigate to *Equipment* → *Current hearing aids*.
- b. Select **Actions** → **Repair**.



- c. Proceed to **Step 3**.

For all eligible equipment:

- a. On the *Patient Summary* screen, click (🛒) **Purchase**.



- b. On the *Purchase Summary* screen, select *Invoice Details* → *Add* → **+ Repairs** to open the *Repair Purchase* window.
- c. Proceed to **Step 3**.

- In the *Repair Purchase* window, select in the **Equipment to Repair** field, then select a **Repair Type**. Fill or adjust any other fields as needed, then click **Save**.



If you navigated to this screen from *Patient Summary* → *Equipment* → *Current hearing aids*, the **Equipment to Repair** field is automatically filled.

Repair Purchase

<p>Equipment To Repair Required</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> (Right) AccuQuest CT5 CP, VC PS GR BTE Digital, AccuQuest CT5 CP, VC PS GR BTE Digital, hhuhiuhu </div> <p>Sent To</p> <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <p>Repair Price</p> <div style="display: flex; align-items: center; margin-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 10px; margin-right: 5px;">\$50.00</div> <input checked="" type="checkbox"/> Apply Sales Taxes </div> <p>Purchase Price</p> <div style="border: 1px solid #ccc; padding: 2px 10px; margin-bottom: 5px; text-align: right;">\$55.00</div> <p>Purchase Date</p> <div style="border: 1px solid #ccc; padding: 2px 10px; margin-bottom: 5px;">06/23/2023</div>	<p>Repair Type Required</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> OTC repair - Right earbud </div> <p>Description</p> <div style="border: 1px solid #ccc; height: 20px; margin-bottom: 5px;"></div> <p>Discounts</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> Add Discount </div> <p>Warranty Expiry</p> <div style="border: 1px solid #ccc; padding: 2px 10px; margin-bottom: 5px;"></div>
---	--

Insurance

Warning! This item can not be billed to insurance because the patient is missing diagnosis codes. To bill insurance for this patient, create an appointment and provide at least one diagnosis code.

Save

Cancel

- Complete any remaining work on the *Purchase Summary* screen (e.g. additional payments, items, etc.), then click **Close** to exit the screen.

For instructions on checking the repaired device in, see [Check In and Deliver an OTC Hearing Aid, page 21](#).

5.3. Exchange an OTC Hearing Aid

OTC hearing aids can be exchanged for a different OTC hearing aid kit. Exchanges are created for the whole OTC hearing aid kit (e.g. both ears). The newly-exchanged hearing aids will become the patient's current hearing aids.



OTC hearing aid kits can only be *exchanged* for other OTC hearing aid kits. The process of "exchanging" OTC hearing aids for prescription hearing aids is referred to as "upgrading," and is covered in [Upgrading OTC to Prescription Hearing Aids, page 33](#).

Assuming an OTC hearing aid kit is being exchanged, the following exchange workflows are supported:


- *Binaural OTC hearing aid kit* → **Binaural OTC hearing aid kit**
- *Left or right OTC hearing aid* → **Left or right OTC hearing aid**

The following exchange workflows are *not* supported:

- Exchanging binaural OTC hearing aid kits for a mix of OTC and prescription hearing aids.
- Exchanging binaural OTC hearing aid kits for a single OTC hearing aid.



While the workflows above are not supported when *exchanging* OTC hearing aids, they can be done by returning the OTC hearing aid kit, then purchasing the required items separately.

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 *Equipment* → *Current hearing aids*.
3. Select *Actions* → **Exchange**.

Hearing summary	Equipment	eDocs
Right ear	Actions ▾	
OTC Generi	Return	
124575623	Exchange	
06/22/2023	Repair	
	Edit	



Exchanges can only be performed on current hearing aids and current receivers.

- In the *Exchange OTC hearing aid* window, confirm that the equipment being returned is selected. If needed, set the **Return date** field to the correct date. Click **Exchange**.

- In the *Purchase Summary → OTC Hearing Aid Exchange* window, select a new OTC hearing aid kit. Fill in the relevant fields for the new device(s), then click **Exchange**.



When exchanging OTC for OTC, the **Intended Use** field will reflect the selection made in the original purchase and can not be adjusted.

- In the *Payment Transfer* window, enter the transfer amount(s) to transfer from the original invoice to the exchange invoice and click **Transfer**. If there are no payments to transfer or you do not want to transfer the payment amount, click **Cancel**.

Payment Date	Payment Type	Payment Description	Payment Amount (remaining)	Transfer Amount
06/22/2023	Cash		\$139.00	\$139.00

Total: \$139.00

- Complete any remaining work on the *Purchase Summary* screen (e.g. additional payments, items, etc.), then click **Close** to exit the screen.

After the exchange, you can review the patient's newly-exchanged equipment at *Patient Summary → Equipment → Current hearing aids*.

5.4. Upgrading OTC to Prescription Hearing Aids

OTC hearing aid kits can be upgraded to prescription hearing aids. Upgrades are performed on the entire OTC hearing aid kit (e.g. both ears). The prescription hearing aids will become the patient's current hearing aids.



The upgrade process described in this chapter refers only to the process of exchanging or converting OTC hearing aid kits to prescription hearing aids. The process of exchanging OTC hearing aids for other OTC hearing aids is covered in [Exchange an OTC Hearing Aid, page 31](#).

Assuming an OTC hearing aid kit is being upgraded, the following upgrade workflows are supported:

- *Binaural OTC hearing aid kit* → **Left and Right Prescription hearing aids**
- *Left or right OTC hearing aid* → **Left or right Prescription hearing aids**


The following upgrade workflows are *not* supported:

- Upgrading binaural OTC hearing aid kits for a mix of OTC and prescription hearing aids.
- Upgrading binaural OTC hearing aid kits for a single prescription hearing aid.




While the workflows above are not supported when *upgrading* OTC hearing aids, they can be done by returning the OTC hearing aid kit, then purchasing the required items separately.

Performing an Upgrade

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 *Equipment* → *Current hearing aids*.
3. Select *Actions* → **Upgrade**.

Hearing summary	Equipment	eDocs
Right ear	Actions ▾	
OTC Generi	Return	
124575623	Exchange	
06/22/2023	Upgrade	
	Repair	

- In the *Upgrade OTC to prescription hearing aid* window, confirm that the equipment being returned is selected. If needed, set the **Return date** field to the correct date. Click **Upgrade**.

 This window will not appear for imported OTC hearing aids. If you are upgrading imported OTC hearing aids, skip ahead to [Step 6](#).

Upgrade OTC to prescription hearing aid
✕

Binaural fit

OTC Generic RE123 BTE

* Return date

09/11/2023
📅

Close date restriction may be in effect

Upgrade
Cancel

- In the *Purchase Summary* → *Returnwindow*, confirm the items being returned and the Return Date, then click **Save**.

Return
✕

Return the following items?

Binaural OTC Hearing Aids: Generic RE123 BTE, Kit SN 12333231231241

Return Date

09/11/2023
📅

- In the *Purchase Summary* → *Upgrade OTC Hearing Aid to prescription hearing aid* window, select a new prescription hearing aid(s). Fill in the relevant fields for the new device(s), then click **Upgrade**.

- In the *Payment Transfer* window, enter the transfer amount(s) to transfer from the original invoice to the upgrade invoice and click **Transfer**. If there are no payments to transfer or you do not want to transfer the payment amount, click **Cancel**.



This window will not appear for imported OTC hearing aids. If you are upgrading imported OTC hearing aids, skip ahead to [Step 8](#).

Payment Transfer
✕

Transferring Payment from Invoice No.5346: *Balance (\$139.00)*

Payment Date	Payment Type	Payment Description	Payment Amount (remaining)	Transfer Amount
06/22/2023	Cash		\$139.00	\$139.00

Total: \$139.00

Transfer
Cancel

- Complete any remaining work on the *Purchase Summary* screen (e.g. additional payments, items, etc.), then click **Close** to exit the screen.

After the upgrade, you can review the patient's new prescription hearing aid equipment at *Patient Summary* → *Equipment* → *Current hearing aids*.

5.4.1. Reversing an Upgrade

If a patient wants to return to their OTC equipment after converting to a prescription hearing aid, delete the prescription hearing aid from the *Purchase Summary* screen (or delete the invoice containing the prescription hearing aid).

The current equipment available to be selected in the *Current Equipment* window differs when deleting prescription hearing aids that were sold as part of an upgrade from OTC hearing aid kits, and so the patient's previous OTC hearing aid equipment may not appear as an option.

- If the original OTC hearing aid kit was sold from in stock and was returned to stock at the time of the upgrade, you can not select the same OTC hearing aid kit as the patient's current equipment when reversing an upgrade.
- If the original OTC hearing aid kit was sold not from stock, the OTC hearing kit is counted as a return and can not be selected as the patient's current equipment when reversing an upgrade.
- If the original OTC hearing aid kit was imported, the OTC hearing aid kit became the patient's backup equipment at the time of the upgrade. While the backup equipment can not be selected as the patient's current equipment in the *Current Equipment* window when reversing an upgrade, that equipment's status can be changed from **Backup** to **Current** (see [Change a Patient's OTC Hearing Aid Status, page 25](#)).

When an upgrade is reversed, the **conversion rate** (used in various [OTC Reports, page 37](#)) is amended (i.e. reduced) to reflect the upgrade reversal.



When an OTC hearing aid kit is upgraded to binaural prescription hearing aids and only *one* of the prescription hearing aids involved in the upgrade is deleted (retaining the other half of the binaural prescription hearing aid set), the conversion rate is *not* reduced (as an upgrade was still performed and retained).

6. OTC Reports

Sycle contains two reports dedicated to OTC hearing aids: the [OTC Hearing Aid Sales Report, page 37](#) and the [OTC HA Patient List, page 40](#).

Other reports in Sycle include OTC hearing aid data in various ways, such as including OTC hearing aid sales data in total sales amounts or by showing OTC hearing aid data in separate columns. OTC data in these reports is summarized in [OTC Data in Other Reports, page 42](#).



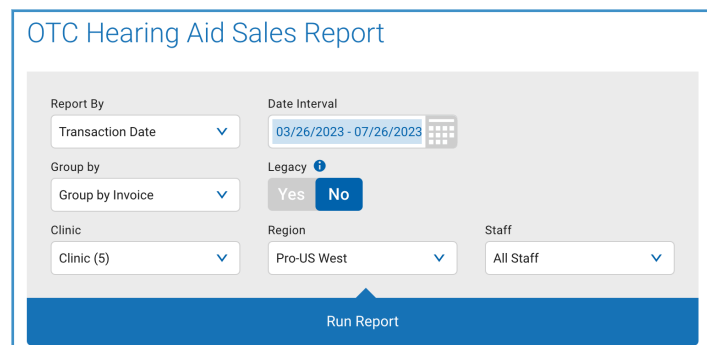
Upgrades (from OTC to prescription hearing aids) are shown in reports as *conversions*.

6.1. OTC Hearing Aid Sales Report

The OTC Hearing Aid Sales report is a dedicated financial report that contains the data on OTC hearing aid sales, returns, exchanges, conversions (upgrades), and canceled orders.

Parameters

The parameters below are named either by their label on the screen or by their default contents.



The screenshot shows the 'OTC Hearing Aid Sales Report' parameter form. It includes the following fields and options:

- Report By:** Transaction Date (dropdown)
- Date Interval:** 03/26/2023 - 07/26/2023 (calendar icon)
- Group by:** Group by Invoice (dropdown)
- Legacy:** Yes/No (radio buttons, 'No' is selected)
- Clinic:** Clinic (5) (dropdown)
- Region:** Pro-US West (dropdown)
- Staff:** All Staff (dropdown)
- Run Report:** (blue button)

Report By	Generate the report using either the Transaction Date or the Delivery Date .
Group by	Group the results in the report by invoice number (Group By Invoice) or by individual purchase (Group By Individual Purchase).
Clinic	Select a clinic (or clinics). The report will only generate results for the selected clinic(s).
Date Interval	Select the dates that mark the start and end dates for the time period to include in the report. The report generates with data from the time period between the start and end dates (inclusive of the dates selected).
Legacy	Select Yes to include equipment imported from Sycle Classic.



This field should be set to **No** when running the OTC Hearing Aid Sales report.

- Region Select a **region** to select all clinics in that region in the **Clinics** field (removing any clinics not in the selected region).
- Staff Select a staff member (or staff members) to narrow the report results to include only those items sold, exchanged, returned, upgraded, or canceled by the staff member(s) selected.

Columns

The following columns are generated by the OTC Hearing Aid Sales report. The report is separated into district sections (sales, returns, exchanges, OTC conversions, and canceled orders); the behavior of some columns changes depending on the section.

- Old/New Indicates whether the *OTC Conversions* row is listing the data for the OTC hearing aid that was upgraded (**Old**) or the prescription hearing aid (**New**). Imported OTC hearing aids are shown as **Old (Import)**. Imported OTC hearing aids that were upgraded will leave certain columns blank (when that data does not exist), such as delivery date or sales values.
- Sale Date The date the purchase record was created. **Click** the date to open the *Purchase Summary* associated with the purchase.
- Delivery Date This field populates with the (latest) date on which the OTC hearing aids were marked as delivered. If any of the OTC hearing aids on the invoice have not yet been marked as delivered, this field is blank.
- Return Date If an OTC hearing aid on the invoice has been marked as returned, this field displays the date of the return. **Click** the date to open the *Purchase Summary* associated with the return.
- Staff Name The staff member denoted on the invoice.
- Patient Name The patient associated with the invoice.
- Patient ID The patient ID for the patient associated with the invoice. **Click** the patient ID to open that patient's *Patient Summary*.
- Clinic Name The clinic the invoice was submitted under.
- Referral Source The referral source selected for the appointment. If there was no appointment, this field is blank.
- Subcategory The referral sub-category selected for the appointment. If there was no appointment, this field is blank.
- Ref Description The description for the referral source. If there was no appointment or no description was entered, this field is blank.
- Campaign The campaign selected for the appointment. If there was no appointment, this field is blank.
- Kits The number of OTC hearing aid kits on the invoice.
- Manufacturer The manufacturer(s) of the OTC hearing aid kit(s) on the invoice. Multiple manufacturers are separated by a vertical bar (|).
- Model The model(s) of the OTC hearing aid kit(s) on the invoice. Multiple models are separated by a vertical bar (|).
- Type The type(s) of OTC hearing aid(s) on the invoice. Multiple types are separated by a vertical bar (|).

Kit Serial Number	The serial numbers for the OTC hearing aid kits on the invoice,
Gross Price	Sum of gross price sold or gross price returned, depending on where the field is used. Negative values (e.g. for returns) are expressed in parentheses.
Discount	Sum of discounts applied to sales or returns, depending on where the field is used. Negative values (e.g. for sales) are expressed in parentheses.
Net Price	Net price (Gross Price less any applied Discount) of items sold or returned, depending on where the field is used.
Sales Tax	Sum of sales tax applied on sales or returns on the invoice.
Total Price	The total price of the invoice (Net Price plus any Sales Tax applied).
Initial Payment	The total amount of any payments made on the invoice on the same day the invoice was created (the Sale Data).
Insurance Payment	The total value of any insurance payments made on the invoice.
Insurance Co.	The name of the insurance company selected in <i>Due From Insurance</i> on the invoice.
Fees	The sum of any fees on the invoice.
Non-HA	The net sum (including applied Discount and Sales Tax amounts) of all purchases on the invoice, <i>excluding</i> hearing aids.



This total only excludes *prescription* hearing aids. The net cost of OTC hearing aids are included in this total.

Balance Paid	The sum of all payments made on the invoice.
Balance Due	The sum of the remaining balance on the invoice.
Last Date Paid	The latest date associated with a payment on the invoice.
Insurance	Indicates whether insurance was selected on the <i>Appointment Outcome</i> .



This column is labeled **3rd Party** in Canadian instances.

Companion	Indicates whether the patient has a companion set in their record.
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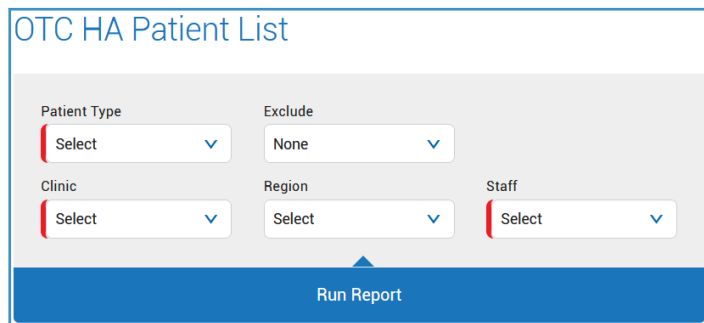
6.2. OTC HA Patient List

The OTC HA Patient List report is a dedicated marketing report that generates a list of all patients that have an OTC hearing aid listed as their current equipment.

Note that this report is not limited to patients that have purchased an OTC hearing aid from the clinic; a patient that had their OTC hearing aid imported ([Import OTC Hearing Aids, page 17](#)) will also appear on this report (so long as an OTC hearing aid is set as that patient's current equipment).

Parameters

The parameters below are named either by their label on the screen or by their default contents.



Patient Type

Select a patient type (or multiple patient types) to include in the report (**Prospect, Current, Competitive**). At least one selection must be made in this field.



Patient type is initially set during patient intake, and can be edited on the *Patient Summary* screen.



Unlike the *Patient Type* report, you can not select the **Archived** patient type in the *OTC HA Patient List* report.

Clinic

Select a **clinic** (or **clinics**). The report will only generate results for the selected clinic(s).

Exclude

Select a privacy group (or multiple groups) to exclude patients in that group from the report (**Do Not Mail, Do Not Call, Do Not Email, Do Not Text**).



A patient's privacy groups can be edited on the *Patient Summary* screen (**Full details** → *Privacy*).

Region

Select a **region** to select all clinics in that region in the **Clinics** field (removing any clinics not in the selected region).

Staff

Select a staff member (or staff members) to narrow the report results to include only those patients with current OTC HA equipment that

was sold, exchanged, returned, or imported by the staff member(s) selected.

Columns

The following columns are generated by the OTC HA Patient List report.

Patient ID	The patient's ID number. Click the patient ID to open that patient's <i>Patient Summary</i> .
Title, First Name, Last Name, Preferred Name, Date of Birth	The patient's personal details. Click the First Name or Last Name to open that patient's <i>Patient Summary</i> .
Patient Type	Indicates whether the patient is defined as a Prospect , Current , or Competitive patient type.



Patient type is initially set during patient intake, and can be edited on the *Patient Summary* screen.



Unlike the *Patient Type* report, you can not select the **Archived** patient type in the *OTC HA Patient List* report.

Street 1, Street 2, City, State/Province, Zip/Postal Code, Country, E-mail Address, Phone

The patient's contact information.



This information appears on the report regardless of the patient's privacy settings; for example, a patient's email address still appears in the report if the patient's privacy setting includes **Do Not Email**. Ensure you make note of patients' privacy groups (below) and/or filter the report appropriately with the **Exclude** parameter.

Do Not Mail, Do Not Call, Do Not Email, Do Not Text

Indicates whether a patient belongs to a privacy group (**Y**) or if a patient does not belong to a privacy group (column is blank).



A patient's privacy groups can be edited on the *Patient Summary* screen (**Full details** → *Privacy*).

Clinic

The patient's main clinic (as set in *Patient Summary* → *Clinic & provider*).

Last appointment

The date of the patient's last uncanceled appointment (occurring on or before the current date). **Click** the date to open the *Appointment Summary* screen.

Last Provider Seen

The full name of the staff member associated with the patient's last uncanceled appointment.

Purchase Date	The latest date that a purchase record for the patient's current OTC hearing aid equipment was created. Click the date to open the <i>Purchase Summary</i> associated with the purchase.
OTC Product	The name of the patient's current OTC hearing aid equipment.

6.3. OTC Data in Other Reports

In addition to the dedicated OTC reports, various reports in Sycle include OTC hearing aid data.

Sales Summary Report

- Five columns specific to OTC hearing aids are included in the report:
 - **OTC Conversions:** The revenue value of conversions (upgrades) from OTC hearing aids to prescription hearing aids.
 - **OTC HA Kit:** Total number of OTC hearing aid kits sold.
 - **OTC HA Returned Kit:** Total number of OTC hearing aid kits returned.
 - **OTC HA Cancelled Kit:** Total number of OTC hearing aid kits canceled.
 - **OTC HA Return %:** Percentage of OTC hearing aid kits returned.
 - **OTC Conversion Rate:** The conversion rate of conversions (upgrades) from OTC hearing aids to prescription hearing aids.
- OTC hearing aid sales is reflected in the **Sales, Returns, Exchanges, Cancelled,** and **Net Sale** columns of the report.
- OTC hearing aid data is *not* reflected in the **HA Unit, HA Returned Unit, HA Cancelled Unit, HA Net Unit, HA Average Sale Price, HA Binaural %, or HA Return %** columns. Only prescription hearing aid data is used for these columns.
- Prescription hearing aids sold as part of an OTC upgrade/conversion have their value reported separately in the **OTC Conversions** column. The value of these conversions are included in the **Net Sale** column. This value is *not* reflected in the **Sales** column.
- The **HA Unit, HA Average Sale Price,** and **HA Binaural %** columns includes prescription hearing aids sold as part of an OTC upgrade/conversion.

Total Sales Report

- The *Purchases* parameter includes the **OTC Hearing Aid** option, allowing you to filter the report to include, exclude, or show only OTC hearing aid sales, returns, exchanges, and canceled orders.



When the *Purchases* parameter is set exclusively to **OTC Hearing Aid**, the *Replacements* section of the Total Sales Report does not generate.

- The **Type** column shows **OTC Hearing Aid** for OTC hearing aid sales, returns, exchanges, and canceled orders.
- Prescription hearing aids sold as part of an OTC upgrade/conversion have their value reported separately in the **OTC Conversions** section; the value of these prescription hearing aids is *not* reflected in the **Sales** section.
- The *OTC Conversions* table of the report shows data for the upgraded OTC hearing aid(s) (listed as **Old** in the *New/Old* column) or the prescription hearing aid(s) (listed as **New** in the *New/Old* column). Imported OTC hearing aids are shown as **Old (Import)** in the *New/Old* column. Imported OTC hearing aids that were upgraded will leave certain columns blank (when that data does not exist), such as delivery date or sales values.



The *OTC Conversions* table only appears if either **Hearing Aids** or **OTC Hearing Aids** are selected in the *Purchases* parameter.

Sales Report

- The **OTC Hearing Aid** row in the *Sales* section of the report shows OTC hearing aid sales data.
- Prescription hearing aids sold as part of an OTC upgrade/conversion have their value reported on the **Hearing Aid** row of the *Sales* section of the report.
 - OTC returns processed as part of an upgrade will be reflected on the **OTC Hearing Aid** row in the *Sales* section of the report.
- OTC sales are reflected in the **Subtotal, Returns, Cancellations,** and **Total** values of the *Sales* section of the report.

Sales By Zip Code / Postal Code / Postcode



This report's title (and the labeling of some columns) differs depending on your country. For example: in the USA, Sycle shows Zip Code; in CAN/UK/ROI, Postal Code; in Australia, Postcode.

- The **OTC HA Net Kits** column in the *Sales by* section of the report shows the net OTC hearing aid kits sold (binaural sales are counted as two kits).
- OTC sales are reflected in the **Gross Revenue, Return Revenue, Exchange Revenue, Cancellation Revenue, Discount Amount,** and **Net Revenue** values of the *Sales* section of the report.
- The value of prescription hearing aids sold as part of an OTC upgrade/conversion is shown in the **OTC Conversion Revenue** column; this value is *not* reflected in the **Gross Revenue** column.
- OTC hearing aid data is *not* reflected in the **HA Net Units** column. Only prescription hearing aid data is used for that column.

Hearing Aid Sales Report

- Prescription hearing aids sold as part of an OTC upgrade/conversion have their value reported separately in the **OTC Conversions** section; the value of these prescription hearing aids is *not* reflected in the **Sales** section.
- The *OTC Conversions* table of the report shows data for the upgraded OTC hearing aid(s) (listed as **Old** in the *New/Old* column) or the prescription hearing aid(s) (listed as **New** in the *New/Old* column). Imported OTC hearing aids are shown as **Old (Import)** in the *New/Old* column. Imported OTC hearing aids that were upgraded will leave certain columns blank (when that data does not exist), such as delivery date or sales values.

Quick Business

- Seven sections of the report are dedicated to OTC hearing aids:
 - OTC Conversions
 - Gross OTC Hearing Aid Kits Sold

- OTC Hearing Aid Kits Returned
- OTC Hearing Aid Kits Exchanged
- OTC Hearing Aid Kits Cancelled
- OTC Hearing Aid Kits Return Rate
- OTC Conversion Rate
- OTC sales data is reflected in the **Gross Revenue, Returns, Exchanges, Cancellations, and Net Revenue** sections of the report.
- Prescription hearing aids sold as part of an OTC upgrade/conversion have their value reported separately in the **OTC Conversions** section. The value of these conversions are included in the **Net Revenue** section. This value is *not* reflected in the **Gross Revenue** section.
- The **OTC Conversion Rate** column's values are calculated as $(\text{ConvertedPatients} \div \text{EligiblePatients}) \times 100$. *ConvertedPatients* includes patients that had their OTC hearing aids imported.

Warranty Expiration Report

- The **Left Warranty Expiration** and **Right Warranty Expiration** columns show the manufacturer warranty on the OTC hearing aid kit.



The only valid **Warranty Type** for OTC hearing aid kits is **Manufacturer**.

- OTC hearing aids are prefaced with "OTC" in the **Equipment** column. For example, an OTC hearing aid kit named "RealCompanyName BTE Digital" will be displayed as "OTC RealCompanyName BTE Digital" in the **Equipment** column.
- The **HA Purchase Date** column in this report is used for both prescription and OTC hearing aids.

Inventory Status Report

- **OTC Hearing Aid** can be selected in the *Item Type* report parameter, and appear as such in the *Item Type* column.
- The *Search by Serial Number* parameter field can be used to search for an OTC hearing aid kit's **Kit Serial #**.
- The *Status* column will never show **Out for Repair** for an OTC hearing aid. OTC hearing aids will not appear in the report if **Out for Repair** is the only selection in the *Item Status* parameter
- The **Technology, Out On Loan Date, and Loan Due Date** columns will be blank for OTC hearing aids.

Appendix A. Glossary

The following terms and/or common procedures are used in this document:

Microsoft Excel Open XML Format Spreadsheet file (.xlsx)	The .xlsx file format is a binary file format used by Microsoft Excel to store and organize spreadsheet data. You can open these files in other spreadsheet programs, including Apple Numbers and Google Sheets.
Over-the-counter hearing aid (OTC HA)	Basic, low-cost, air-conduction hearing aids available without a prescription (or fitting by an audiologist) to individuals 18 years or older with mild to moderate perceived hearing loss. Typically, OTC hearing aid kits include hearing aids for both ears and several accessories. Unlike prescription hearing aids, OTC hearing aids can be sold to walk-in patients without an appointment.
Sycle Customer Experience Team	Sycle's dedicated team is just a phone call or email away. For sales, training or support requests, call 888.881.7925 . You can also contact the team via email at <support@sycle.net>.

Appendix B. Document Revision History

Rev #	Date	Description
1.1	2023-11-20	<ul style="list-style-type: none"> Added lines to the Sales Report section of the <i>OTC Data in Other Reports</i> chapter detailing how prescription hearing aid revenue from an upgrade is now reflected on the Hearing Aid row (and OTC returns as part of an upgrade are reflected on the OTC Hearing Aids row). [PROF-4597]
1.0	2023-10-18	<ul style="list-style-type: none"> Document released. Document classification changed to Public. Removed <i>Confidential</i> labels.
0.7	2023-10-11	<ul style="list-style-type: none"> Added the <i>Reversing an Upgrade</i> section to the <i>Upgrading OTC to Prescription Hearing Aids</i> chapter. [PROF-4439] Multiple changes in the <i>OTC Data in Other Reports</i> chapter, primarily regarding how reports handle the sale of prescription hearing aids as part of an OTC upgrade/conversion: <ul style="list-style-type: none"> Defined behavior of conversions in the OTC Conversions, Net Revenue, and Gross Revenue sections of the <i>Quick Business</i> report. [PROF-4438] Added OTC Conversion Revenue column to the <i>Sales By Zip Code / Postal Code / Postcode</i> section. [PROF-4437] Defined how conversions are handled in the Sales, OTC Conversions, Net Sale, HA Unit, HA Average Sale Price, and HA Binaural % columns of the <i>Sales Summary</i> report. [PROF-4436] Added additional information about how conversions are handled in the OTC Conversions and Sales section of the <i>Total Sales</i> report. [PROF-4435] Added additional information about how conversions are handled in the OTC Conversions and Sales section of the <i>Hearing Aid Sales</i> report. [PROF-4434]
0.6	2023-09-21	<ul style="list-style-type: none"> Change several instances of "hearing aid" to "OTC hearing aid." Added re-direct behavior to <i>Import OTC Hearing Aids</i> chapter. [PROF-4327] Removed <i>Draft</i> watermark. Copy remains uncontrolled and for internal use only.

Rev #	Date	Description
0.5	2023-09-11	<ul style="list-style-type: none"> • Changed some references of Return/Trial Period to Return/Trial Exp. [PROF-4212] • Added the <i>Upgrading OTC to Prescription Hearing Aids</i> chapter. [PROF-4336] [PROF-4337] [PROF-4347] • Edited the <i>Overview</i> and the <i>Exchange an OTC Hearing Aid</i> chapter to reflect the separation of the exchange and upgrade workflows. [PROF-4335] • Noted in the <i>Import OTC Hearing Aids</i> section that imported OTC hearing aids are eligible for upgrading. [PROF-4347] • Renamed the <i>Return, Exchange, and Repair OTC Hearing Aids</i> chapter to <i>Post-Purchase Services for OTC Hearing Aids</i>. • Updated the <i>OTC Hearing Aid Sales Report</i> chapter with the new hearing aid conversion fields. [PROF-4338] • Added multiple columns and/or tables to the <i>OTC Data in Other Reports</i> chapter: <ul style="list-style-type: none"> ◦ Added a <i>Hearing Aid Sales Report</i> section. [PROF-4339] ◦ Added OTC Conversions and OTC Conversion Rate to the <i>Sales Summary Report</i> section. [PROF-4341] ◦ Added the <i>OTC Conversions</i> table to the <i>Total Sales Report</i> section. [PROF-4340]
0.4	2023-08-14	<ul style="list-style-type: none"> • Removed additional references to selecting a "Generic" manufacturer. While often used in example screenshots as a placeholder, it is not intended for use in production environments. • Fixed a step in the <i>Return an OTC Hearing Aids</i> chapter that misrepresented the function of the <i>Current Equipment</i> window. • Improved the <i>Delivery Date</i>, <i>Staff Name</i>, <i>Referral Source</i>, <i>Subcategory</i>, <i>Ref Description</i>, and <i>Campaign</i> column definitions for the <i>OTC Hearing Aid Sales Report</i>. • Added <code>xinfo:keep-together</code> to some elements to keep them with relevant admonitions. • Fixed various errors in <code>menuchoice</code> elements where the combination of selections used denoted a series of UI element actions rather than navigation, and vice versa. • Fixed various minor typographical errors. • Updated field labels and images to reflect recent changes intended to make these labels more consistent across the various screens.

Rev #	Date	Description
0.3	2023-08-02	<ul style="list-style-type: none">• Added the <i>OTC Reports</i> section.<ul style="list-style-type: none">◦ Added <i>OTC Hearing Aid Sales Report</i> chapter.◦ Added <i>OTC HA Patient List</i> chapter.◦ Added <i>OTC Data in Other Reports</i> chapter.• Updated screenshots in the <i>Check In and Deliver an OTC Hearing Aid</i> chapter.• Corrected a defect where <code>glossterm</code> was being used in PDF output for certain navigation steps instead of the intended <code>xi:include</code> and <code>xi:fallback</code>.• Added <i>Over-the-counter hearing aid</i> (OTC HA) to <i>Glossary</i>.

Rev #	Date	Description
0.2	2023-07-14	<ul style="list-style-type: none"> Updated <i>Overview</i> with additional base details about OTC hearing aids. Added copy stating that Sycle updates the list of manufacturers at intervals, and that users can request a manufacturer to be added ahead of the scheduled update. Updated <i>Add OTC Hearing Aids</i> chapter. Removed reference to "Generic" manufacturer. Clarified behavior of the Battery and Return/Trial Period fields in <i>Add new OTC hearing aid</i> window. Added tip for downloading a .xlsx spreadsheet file containing the OTC hearing aids. Changed references to "other" hearing aid types in the <i>Manage OTC Hearing Aid Inventory</i> chapter to be "prescription hearing aids." Updated the <i>View OTC Hearing Aids Inventory</i> chapter by removing references to making additional selections in the <i>Item Statuses</i> field. (In-Stock is the only valid selection in the <i>Item Statuses</i> field for OTC devices, as they can not be sent out for repairs or be on loan.) Added a note to explicitly state this limitation. Updated <i>Add OTC Hearing Aids to In-Stock Inventory</i> chapter by fixing a mislabeled field in Step 4 and replacing instances of "track" or "tracking" in the Kit Serial # field definition with "identify" or "record" (as "track" has an explicit meaning for inventory within Sycle that is not relevant to this field). Updated <i>Import OTC Hearing Aids</i> chapter by adding a note that imported OTC hearing aids can be edited and repaired and by updating the definition of the Kit Serial # field to clarify that the field is optional when importing. Updated <i>Check In and Deliver an OTC Hearing Aid</i> chapter by correcting a mislabeled image caption and replacing outdated screenshots. Updated <i>Exchange an OTC Hearing Aid</i> chapter by changing a reference to "replacing" an OTC hearing aid to "exchanging" an OTC hearing aid (to prevent confusion with the existing Replace functionality in Sycle), adding "Left and Right" or "Left or Right" in the exchange workflow diagram, adding a note that unsupported workflows in the diagram can be achieved by returning and re-purchasing an OTC hearing aid kit, replacing a screenshot that showed a prescription hearing aid being exchanged (instead of an OTC hearing aid), fixing a mislabeled field in a tip annotation (Step 5), and rewrote Step 6's instructions to define different workflows (dependent on payment values). Updated <i>Repair an OTC Hearing Aid</i> chapter by adding alternate workflow to open the <i>Repair Purchase</i> window and rewriting Step 3 to indicate that the Equipment to Repair field is automatically filled (only) when navigating from <i>Patient Summary</i> → <i>Equipment</i> → <i>Current hearing aids</i>. Added Microsoft Excel Open XML Format Spreadsheet file (.xlsx) to <i>Glossary</i>.
0.1	2023-06-26	Initial document creation.