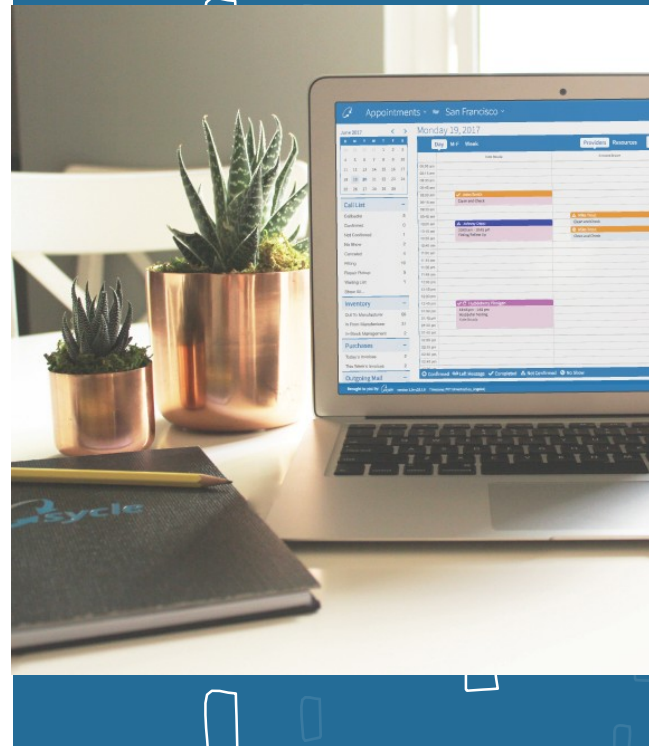




Patient Summary Guideline v1.0



PATIENT SUMMARY

The **Patient Summary** in Sycle contains information related to the patient’s health, insurance, intake history, hearing test results, equipment purchases, and services received. You can keep notes on a patient in two different ways:

1. Through a log of in-house notes.
2. Through a chronological log of appointment outcome notes, which will contribute to the formation of the patient’s medical history within your clinic.

Because the **Patient Summary** creates a Medical Chart History for the patient, it needs to be compliant with national, state, and HIPAA guidelines.

Training on HIPAA and the guidelines for protecting Public Health Information (PHI) should be provided by the clinic to ensure that PHI handled correctly. It is important to enter information into the **Patient Summary** with both detail and accuracy, as the information on this page directly affects the efficiency of all functions within Sycle.

Below is what the top portion of the **Patient Summary** looks like before you add a new patient:

Add New Patient Save Save & Add Another Cancel

Patient Name

Title First Name Middle Initial Last Name Suffix Preferred Name

-- v [] [] [] [] [] []

Contact Info

Phone Number Ext. Phone Type Main Add E-mail Address Main

[] X [] Home v [] + [] []

Street 1 Street 2 Add

[] [] [] +

City State / Province Zip / Postal Code Country

[] Alabama v [] USA v

Patient Info

Gender D.O.B Patient Type Info Health Number Preferred Language

None v MM/DD/YYYY [] Current v [] English v

Membership Number

[]

The bottom portion of the **Patient Summary** will display the following additional fields. As you can see in the screenshot below, these fields are housed within “Tabs”, and you will have the ability to open them as needed to enter relevant information.

The screenshot displays a software interface for a Patient Summary. At the top, there is a horizontal navigation bar with tabs: "Full details" (selected), "Chart history", "Hearing summary", "Equipment", "eDocs", "Insurance", "Finance", and "Scheduling". Below the tabs, the main content area is divided into several expandable sections, each with a right-pointing chevron and a pencil icon for editing. The sections are: "Clinic and provider", "Personal details", "Privacy", "Marital information", "Contact information", and "Responsible party". To the right of these sections is a vertical list of sub-sections: "Clinic and provider", "Personal details", "Privacy", "Marital information", "Contact information", "Responsible party", "Providers & Physicians", "Employment", "Referral source", "Snowbird information", "Emergency contact", and "Custom patient groups".

PATIENT SUMMARY OVERVIEW

Each section of the **Patient Summary** is divided into individualized sections, which you can access by clicking on the section name. The easiest way to navigate through each section is in successive order.

Once a **Patient Summary** has been created for a patient, additional sections will become available to record future information (e.g.: purchases, invoices, repairs, HCFA forms, etc.). A breakdown of each section is below:

Ô **Identity:** As you enter a patient’s health information, it is recommended that you follow U.S. Postal Service Guidelines and forego using punctuation. This will ensure that the HCFA form auto-populates correctly.

Ô **Preferred Name:** This field can be used to indicate the name the patient prefers to be addressed by. It is important to note that the **Preferred Name** does not appear on an appointment.

Ô **Patient Type:** This field can be edited accordingly, and provides a drop-down box with three options:

1. **Prospect:** A new patient to your clinic and/or a patient that does not use hearing instruments.
2. **Current:** A patient that is currently using hearing instruments purchased from your clinic.

3. **Competitive:** A patient that is currently using hearing instruments that were not purchased from your clinic.

Ô **Referral Source:** This allows you to track how the patient was referred to your clinic (e.g.: newspaper, direct mail, patient referral, walk-in, etc.). Follow the steps below to record information:

Ô Select the **Source** from the drop-down box (e.g.: newspaper).

Ô If **Patient Referral** is selected as a **Referral Source**, enter the referring patient's name under **Description**.

Ô Select the **Sub Referral Source** from the drop-down box (e.g.: New York Times).

Ô **Clinic and Provider:** The **Clinic** is where the patient is being seen, and the **Preferred Provider** is who the patient generally sees for appointments.

Ô **Employment and Student Status:** You can enter a patient's employment and/or student status, the name of their employer and/or school, and their occupation (if applicable).

Ô **Marital Status:** A patient's marital status can be entered here. In the event that they are married, you can add their spouse's name, and whether or not their spouse is also a patient at the clinic.

Ô **Snowbird Address:** If a patient spends part of the year in a different residence/location, enter their alternate residence here. The ability to add more than one residence is available – simply click the **plus sign** that has **Add** stated over it.

Ô **Privacy:** Here you can set parameters for how the clinic communicates with the patient. If the patient does not want the clinic to contact them in any or all of the ways listed in this section, take the action below:

Ô Click on the **checkmark** next to the way in which the patient does not want to be contacted (option will be shaded in gray – when selected, it will turn blue).

Ô **Emergency contact:** This is who the clinic should contact on behalf of the patient in case of an emergency. Follow the below steps to add a contact:

Ô Enter the person's name and relationship to the patient.

Ô Enter as much contact information as possible.

Ô If you wish to add someone else, simply click the **plus sign** that has **Add** stated over it.

Ô **Responsible Party:** This is the person who handles finances on behalf of the patient. Follow the below steps to add a responsible party:

Ô Enter the person's name and relationship to the patient.

Ô Enter as much contact information as possible.

Ô If you wish to add someone else, simply click the **plus sign** that has **Add** stated over it.

Ô **Background:** This is where you can enter the information of a patient's previous provider. Fields for both the former provider's name and phone number are available.

Ô **Physicians:** This is usually where a clinic will add a patient's primary physician, although you can opt to add other types of physicians as well. To add a physician, follow the below steps:

Ô Enter the person's name and relationship to the patient.

Ô Enter as much contact information as possible.

Ô If you wish to add someone else, simply click the **plus sign** that has **Add** stated over it.

Ô **Notes:** This section is dedicated to in-house/administrative notes regarding the patient. This section will allow you to create a record log for the patient and to communicate information internally. To enter patient treatment/information, use the **Outcome Notes** section on the **Appointment Summary Page**.

Ô **Insurance:** Information for up to four insurance policies can be added here.

Ô **Hearing loss:** The results of the audiometric test are housed here. This information will be imported from the Hearing Test section of the **Appointment Outcome**.

Ô **Current equipment:** Any equipment that the patient has purchased from your clinic should be entered here. If you previously entered a **Purchase** for this patient, it will automatically populate in this section.

Ô **Other equipment:** After the initial **Patient Summary** has been created, this additional section will become available to you. This is where you can enter in the hearing aid equipment that the patient has purchased from a different clinic (if the **Purchase Date** is unknown, it will default to '1999'). Once a patient purchases hearing aids from your clinic, the hearing aids they were using prior to their new purchase will automatically populate here.

CUSTOM GROUPS/ PATIENT FLAGS

Your company can create unlimited custom groups/patient flags, which you can associate patients with. Why would you want to create **Custom Groups/ Patient Flags**?

Multiple patients may be residents at a specific retirement center, battery club, or civic organization. It can be helpful to group these patients together, especially for tracking and marketing purposes. A report by **Customer Group** can be run at any time and with the new flag option this group/flag will show at the top of the patient summary directly under the patient name.

Find an example of what a **Patient Summary** would look like for a current patient below. Note that the patient's picture, name, Patient ID, and any outstanding balance that the patient owes are featured right in the header.

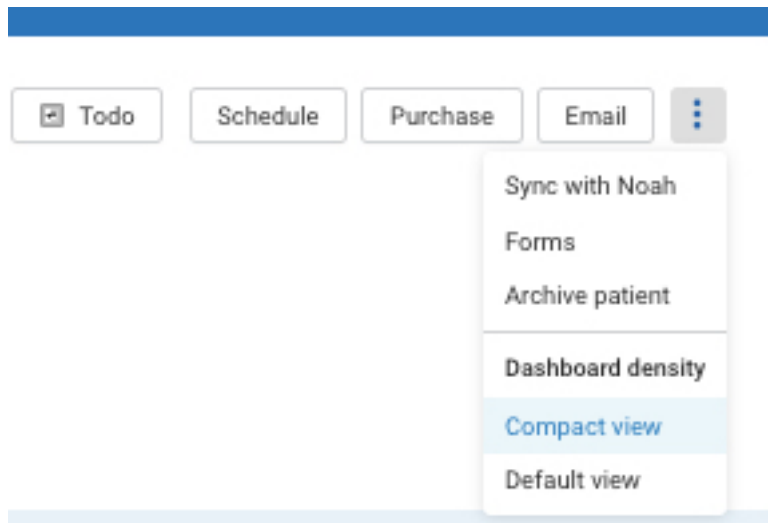
Patient Summary Help John

Clark Kent
 Patient: \$770.14 Insurance: \$5,400.00

Upload Demo No Sale Financed Niles Allegan 2 Todo Schedule Purchase

Patient ID 15414	Last hearing test 06/25/2020	Address 854 Kryptonite Way Indianapolis, Indiana, 12345	OK to mail ✓
Battery R ● 312 L ● 312	Date of birth 03/19/1954 (66)	Insurance company UMWA Health & Retirement Funds	
HA warranty expiry R: 06/10/2022 L: 05/04/2023	Email superman@email.com	Insurance member ID 125487521	OK to email ✓
Next appointment Nothing scheduled	Phone (home) (317) 123-1245 Son's number - Scot	Beltone ID	OK to call, text ✓

To the right of the **Patient Summary**, displays a set of functions that you can perform for the patient as needed.



Below the **Patient Name**, you have the patient's demographics. This includes the patient's **Preferred Provider, Battery Type, Contact Info, Date of Birth**. Additionally, it includes their Last hearing test, Insurance company information and clinic location.

A screenshot of the Patient Summary page for John Adams, PhD. The page has a blue header with a refresh icon and the text 'Patient Summary'. Below the header, the patient's name 'John Adams, PhD' is displayed, along with a profile picture icon and a 'Patient balance: \$657.52' in red. To the right of the name are buttons for 'Todo', 'Schedule', 'Purchase', and 'Email'. The main content area is divided into three columns of information, each with a horizontal line below the text:

- Left Column:** Clinic (San Francisco), Preferred Provider (Doogie Howser), Battery (Left, Right), Member ID/Patient ID (1234567), Upcoming appointment (05/30/2019, 8-8:30am), Type (Current), Speech pathology (Yes).
- Middle Column:** Date of birth (02/01/1955 (64)), Phone ((604) 345-9764), Email (johnadams@gmail.com), Preferred language (English), Tinnitus (Yes), Address (440 Cambie Street, Suite 350, Vancouver, BC V6B 2N5).
- Right Column:** Insurance company (Great Western Life of Canada), Policy number (037000), ID number (123456), Plan (Basic).

In the remainder of the **Patient Summary**, you can find further detail on specific patient information, which is broken out into separate sections.

HEARING SUMMARY

This will display the patient’s last Hearing Test, audiogram(s), Physician reporting, Top 3 listening situations and any Auditory Training provided by LACE.

The screenshot shows a navigation bar with tabs: Full details, Chart history, **Hearing summary**, Equipment, eDocs, Insurance, Finance, and Scheduling. Below the tabs, there are five expandable sections: Audiogram, Hearing tests, Physician reporting, Top 3 listening situations, and Continuum of care. To the right of these sections is a vertical sidebar menu with links: Audiogram, Hearing tests, Physician reporting, Top 3 listening situations, and Continuum of care. The Audiogram section includes links for 'Import' and 'Download Noah file'.

EQUIPMENT












This section houses all the equipment that the patient currently owns: hearing aids, earmolds, remotes, receivers, domes, tubes, and any other type of equipment. You can use this section to exchange, replace, repair, or return any of these items. You can use the menu on the right to jump to a specific section within the **Equipment** section.

The screenshot shows a navigation bar with tabs: Full details, Chart history, Hearing summary, **Equipment**, eDocs, Insurance, Finance, and Appointments. Below the tabs, there are several expandable sections: Current hearing aids, Current domes & tubes, Current earmolds, and Current receivers. To the right of these sections is a vertical sidebar menu with links: Current hearing aids, Current domes & tubes, Current earmolds, Current receivers, Remotes, Repairs, Loans, and CaptionCall. The 'Current hearing aids' section is expanded, showing a table with columns for 'Right ear' and 'Left ear'. The table contains one row of data for a hearing aid.

	Right ear	Left ear
Hearing aid	Med-El Sonnet CI Digital	
Serial #	2589	
Purchase	07/04/2019	
Check-in	11/04/2019	
Delivery	11/04/2019	
Battery	13 High Power	

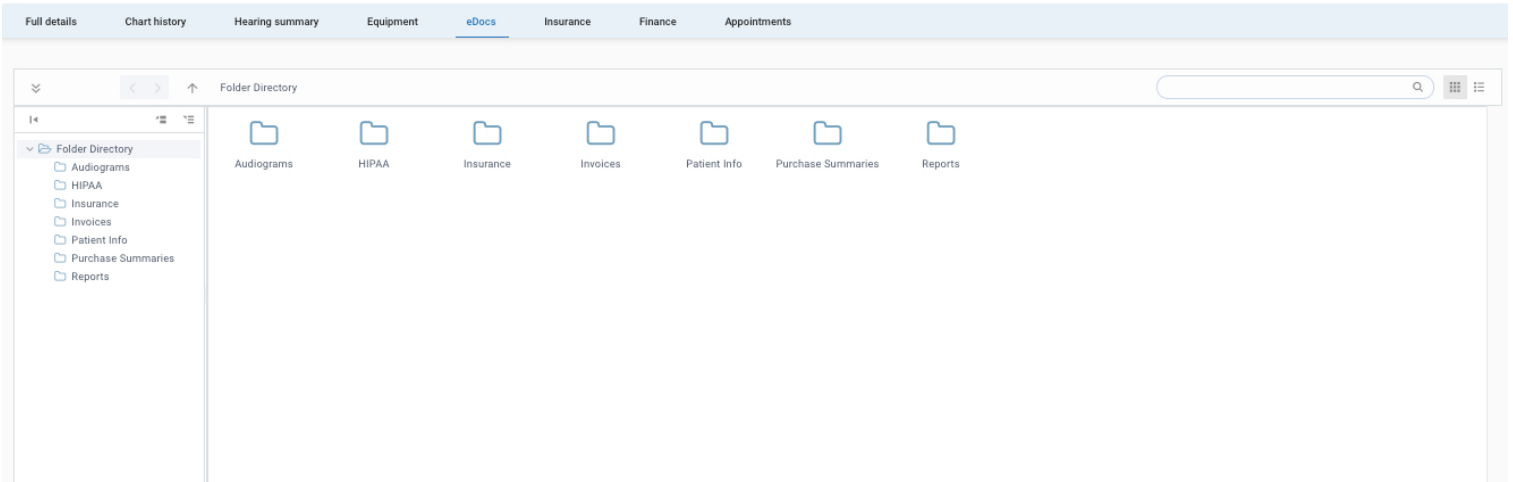
FULL PATIENT DETAIL

This portion encompasses all the Patient demographic information. You can use this section to update any details. The Links on the right will carry directly to the desired section.

Full details	Chart history	Hearing summary	Equipment	eDocs	Insurance	Finance	Appointments		
> Clinic and provider									Clinic and provider
> Personal details									Personal details
> Privacy									Privacy
> Marital information									Marital information
> Contact information									Contact information
> Responsible party									Responsible party
> Providers & Physicians									Providers & Physicians
> Employment									Employment
> Referral source									Referral source
> Snowbird information									Snowbird information
> Emergency contact									Emergency contact
									Custom groups

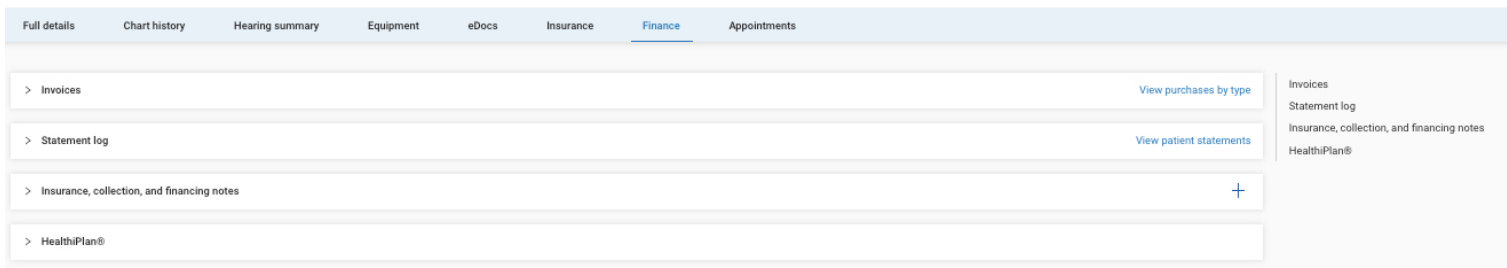
eDOCS

This tool has been built into Sycle so that clinics have the option to go paperless. You can scan and upload patient files here. **eDocs** is 100% HIPAA compliant.



Finance

Any time an invoice is created for a new purchase, all Statements, Insurance, Collections, Financing notes and (if applicable) HealthiPlan patient Financing will be saved in the **Finance** section of the **Patient Summary**. The Links on the right will carry directly to the desired section



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If a patient makes a payment on a balance due, complete the below steps:

The Links on the right will carry directly to the desired section

ÔGo to the **Patient Summary Page**.

ÔSelect the **Finance Section**

ÔSelect **Open Invoice**.

ÔClick **Apply Payment**.

The screenshot shows the 'Finance' section of a patient summary page. At the top, there is a navigation bar with tabs: Full details, Chart history, Hearing summary, Equipment, eDocs, Insurance, Finance (selected), and Appointments. Below the navigation bar, there is a section titled 'Invoices' with a dropdown arrow and a link 'View purchases by type'. The main content is a table with 4 entries. The table has columns: Date, Total due, Due from insurance, Due from patient, and Invoice #. The data rows are:

Date	Total due	Due from insurance	Due from patient	Invoice #
12/19/2019	\$25.00	\$0.00	\$25.00	1169
12/03/2019	\$500.00	\$0.00	\$500.00	1166
07/04/2019	\$150.00	\$0.00	\$150.00	1146
07/04/2019	\$100.00	\$0.00	\$87.00	1145

Below the table, there are three expandable sections: 'Statement log' (with a link 'View patient statements'), 'Insurance, collection, and financing notes' (with a plus sign), and 'HealthiPlan®' (with a plus sign). On the right side of the page, there is a sidebar with links: Invoices, Statement log, Insurance, collection, and financing notes, and HealthiPlan®.

Chart History

If you want to make a note on a patient without associating it with their appointment, add it here in the **Patient Notes**. For example, if you called a patient to discuss new technology, you could record what you discussed in this section. Once this information is added, it won't be deleted, and it is HIPAA compliant.

You will also find the **OutCome Notes** from all completed appointment in this section.

The screenshot shows the 'Chart history' section of a patient summary page. At the top, there is a navigation bar with tabs: Full details, Chart history (selected), Hearing summary, Equipment, eDocs, Insurance, Finance, and Appointments. Below the navigation bar, there is a button 'Print chart history'. The main content is a section titled 'Patient notes' with a dropdown arrow and a plus sign. The main content is a table with 1 entry. The table has columns: Date, Created by, Note, and Actions. The data row is:

Date	Created by	Note	Actions
11/25/2019 2:05 pm	Dr. Tom Logan	Daughter, Alexis, accompanies patient to appointments	⋮

Below the table, there is a note: 'All entries are logged for HIPAA compliance View log'. On the right side of the page, there is a sidebar with links: Patient notes and Outcome notes.

SCHEDULING

This portion will track any previous and upcoming appointments along with the Callbacks and Wait list for the patient.

The **Future Appointments** section will contain any upcoming appointments scheduled for the patient.

The **Past Appointments** section will contain any previous appointments scheduled for the patient.

The **Waiting List** section will so if the patient has been added to the waiting list for an appointment.

- If a patient is unable to be seen on the day/time that they requested, you can add the time block that the patient would prefer to be seen. If another patient cancels or does not show up for an appointment during that time block, a reminder will let you know to call the patient and ask if they would like the newly cancelled appointment.

The **CALLBACKS** section serves as a tool to remind you to call a patient on a specific date for any reason.

- Once you add the necessary information, click **Save**, and a reminder will display on both the **Patient Summary** page and the **Call List** on the **Appointment** page on the date you set to call that patient back.

Insurance

In this section, you will be able to add or view the patients **Insurance Policies** and **Insurance Claims**.