sycle PRO

Patient Summary Guideline v1.0

PATIENT SUMMARY

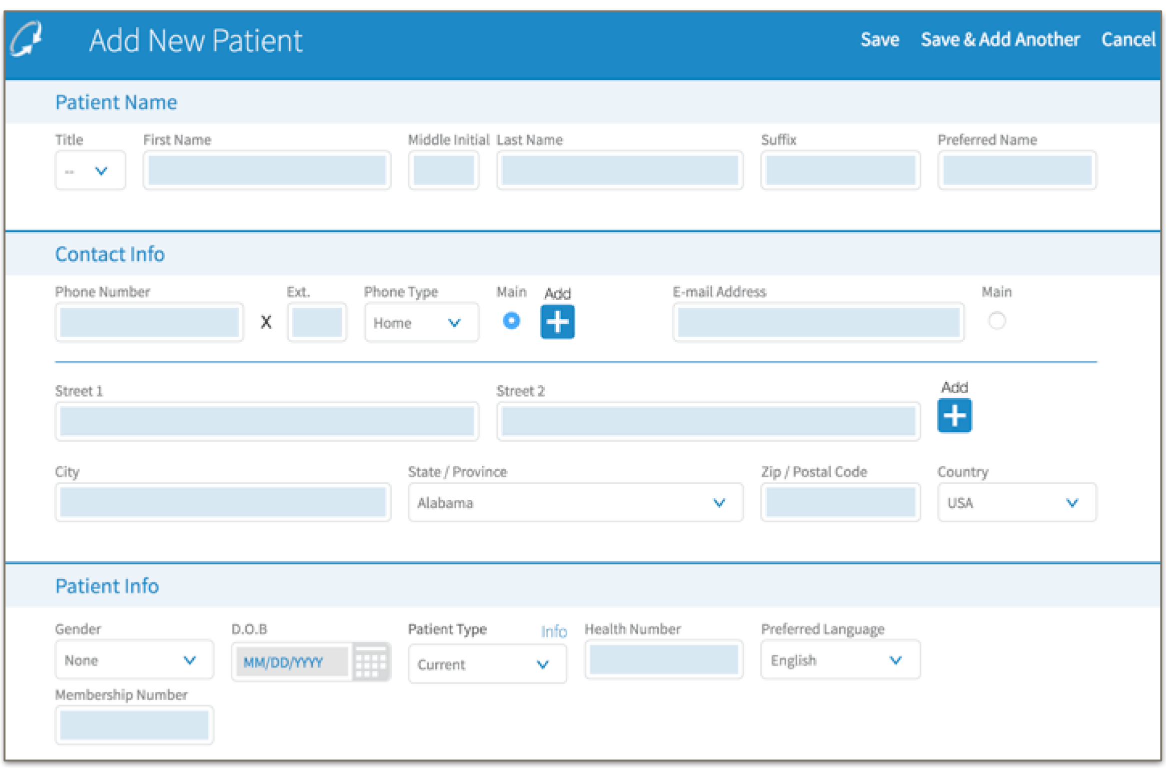
The **Patient Summary** in Sycle contains information related to the patient's health, insurance, intake history, hearing test results, equipment purchases, and services received. You can keep notes on a patient in two different ways:

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.

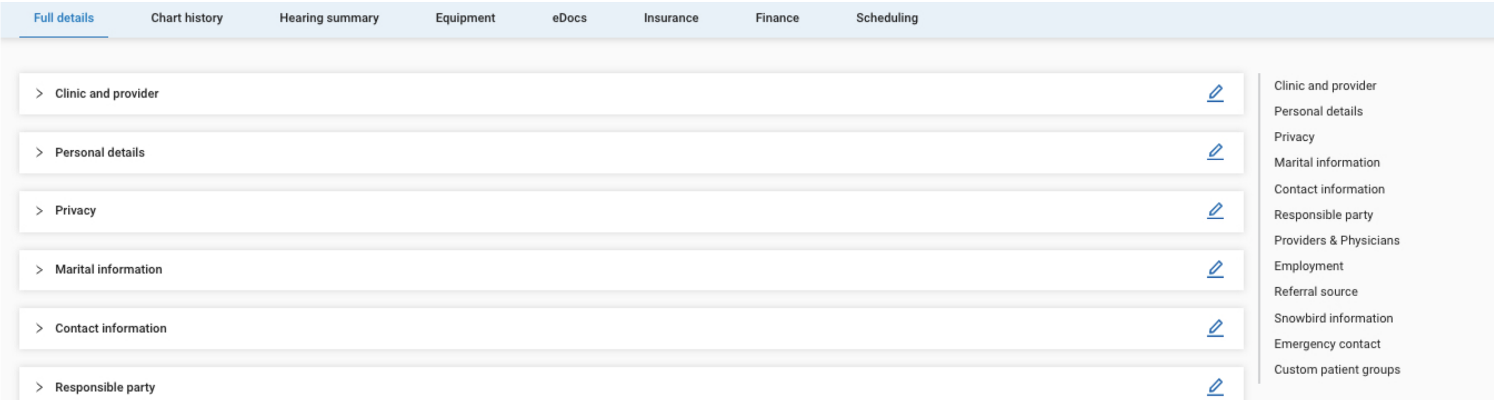
Because the **Patient Summary** creates a Medical Chart History for the patient, it needs to be compliant with national, state, and HIPAA guidelines.

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:



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.



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:

- **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.

- **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.

- **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.

- **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:
    - Select the **Source** from the drop-down box (e.g.: newspaper).
        - If **Patient Referral** is selected as a **Referral Source**, enter the referring patient's name under **Description**.
    - Select the **Sub Referral Source** from the drop-down box (e.g.: New York Times).
- **Clinic and Provider**: The **Clinic** is where the patient is being seen, and the **Preferred Provider** is who the patient generally sees for appointments.
- **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).
- **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.
- **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.
- **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:
    - 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).
- **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:
    - Enter the person's name and relationship to the patient.
    - Enter as much contact information as possible.
    - If you wish to add someone else, simply click the **plus sign** that has **Add** stated over it.

- **Responsible Party**: This is the person who handles finances on behalf of the patient. Follow the below steps to add a responsible party:
    - Enter the person's name and relationship to the patient.
    - Enter as much contact information as possible.
    - If you wish to add someone else, simply click the **plus sign** that has **Add** stated over it.
- **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.
- **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:
    - Enter the person's name and relationship to the patient.
    - Enter as much contact information as possible.
    - If you wish to add someone else, simply click the **plus sign** that has **Add** stated over it.
- **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**.
- **Insurance**: Information for up to four insurance policies can be added here.
- **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**.
- **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.
- **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.

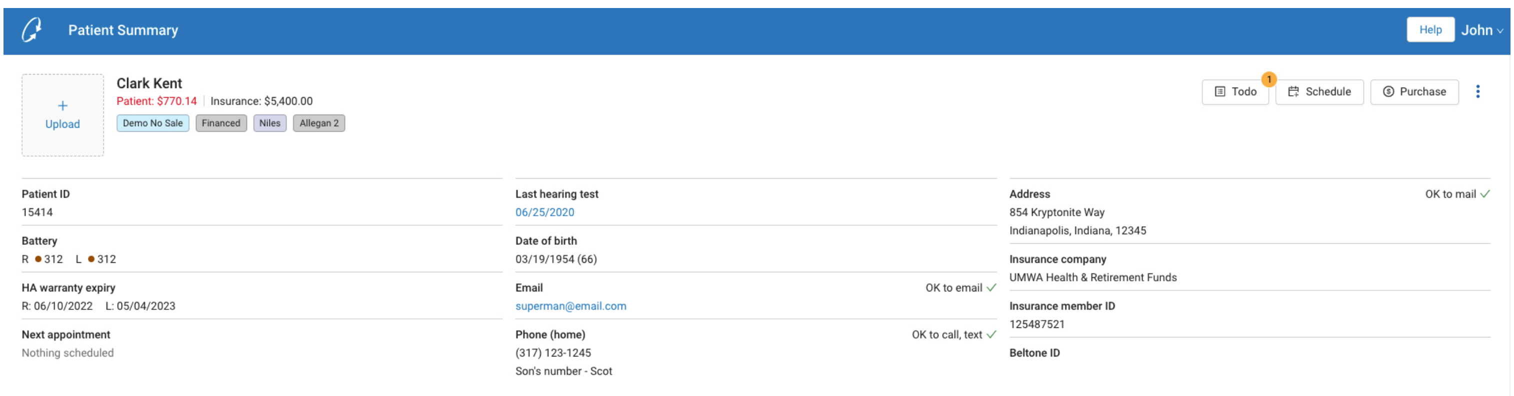
CUSTOM GROUPS/ PATIENT FLAGS

Your company can create unlimited custom groups/patient flags, which you can associate patients

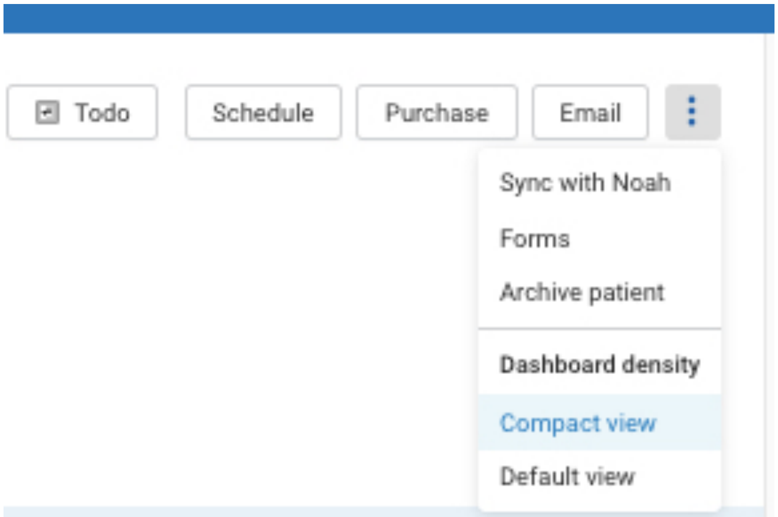
with. Why would you want to create **Custom Groups/ Patient Flags**?

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.

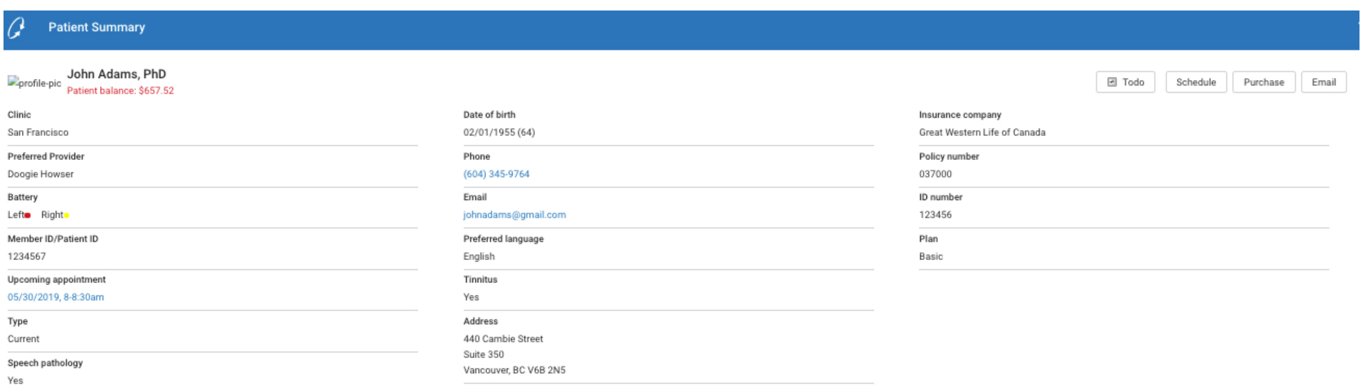
Find an example of what a **Patient Summary** would look like for a current patient below. Note that the patient's picture, name, Patient ID, and any outstanding balance that the patient owes are featured right in the header.



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



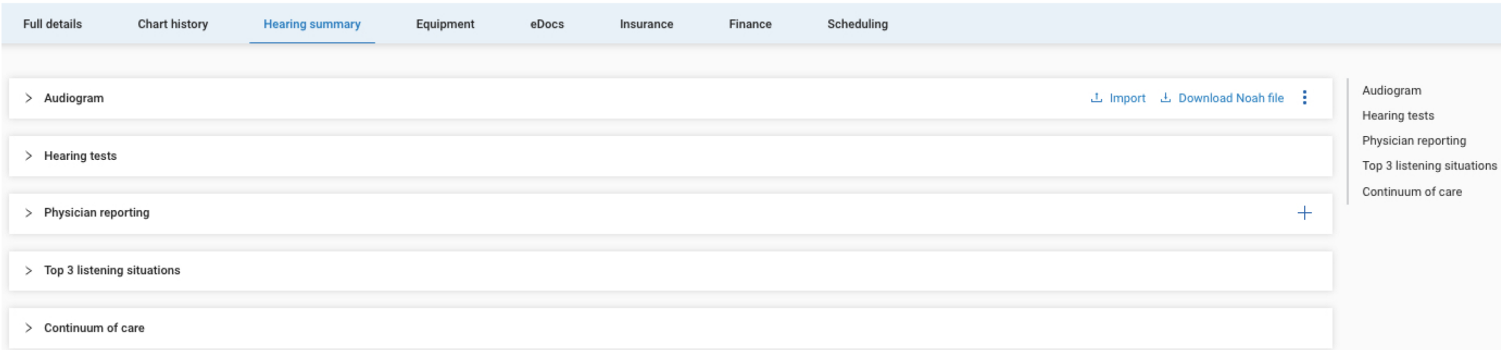
Below the **Patient Name**, you have the patient's demographics. This includes the patient's **Preferred Provider**, **Battery Type**, **Contact Info**, **Date of Birth**. Additionally, it includes their Last hearing test, Insurance company information and clinic location.



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

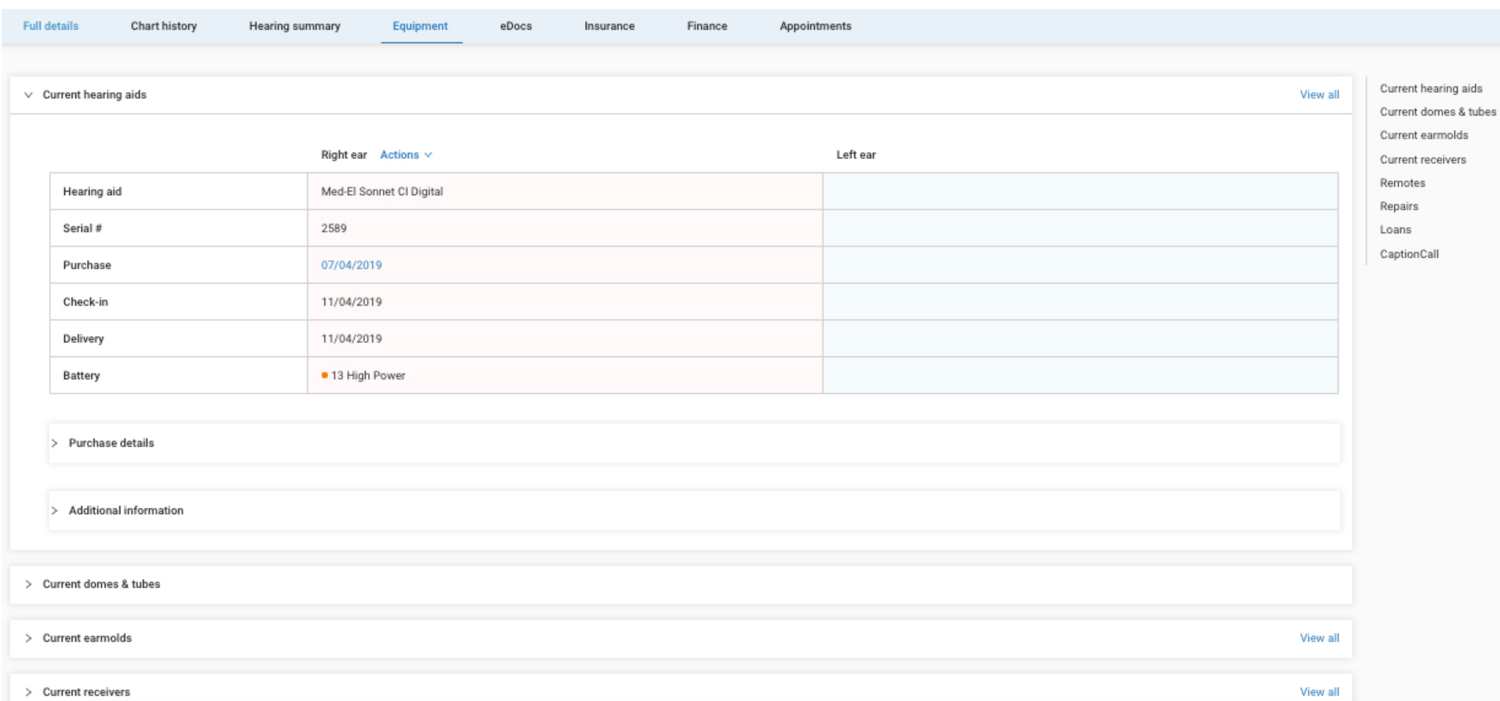
HEARING SUMMARY

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



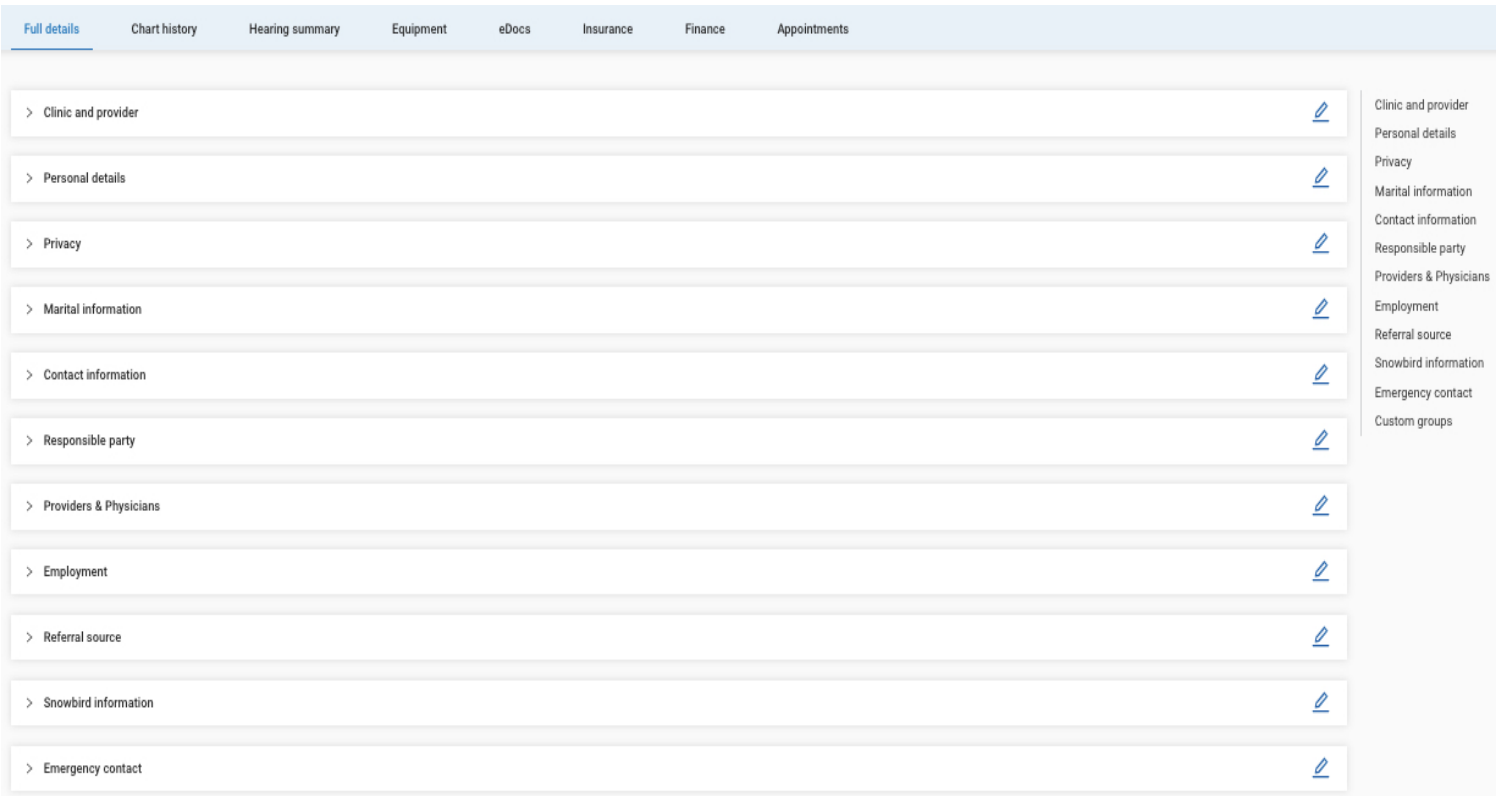
EQUIPMENT

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.



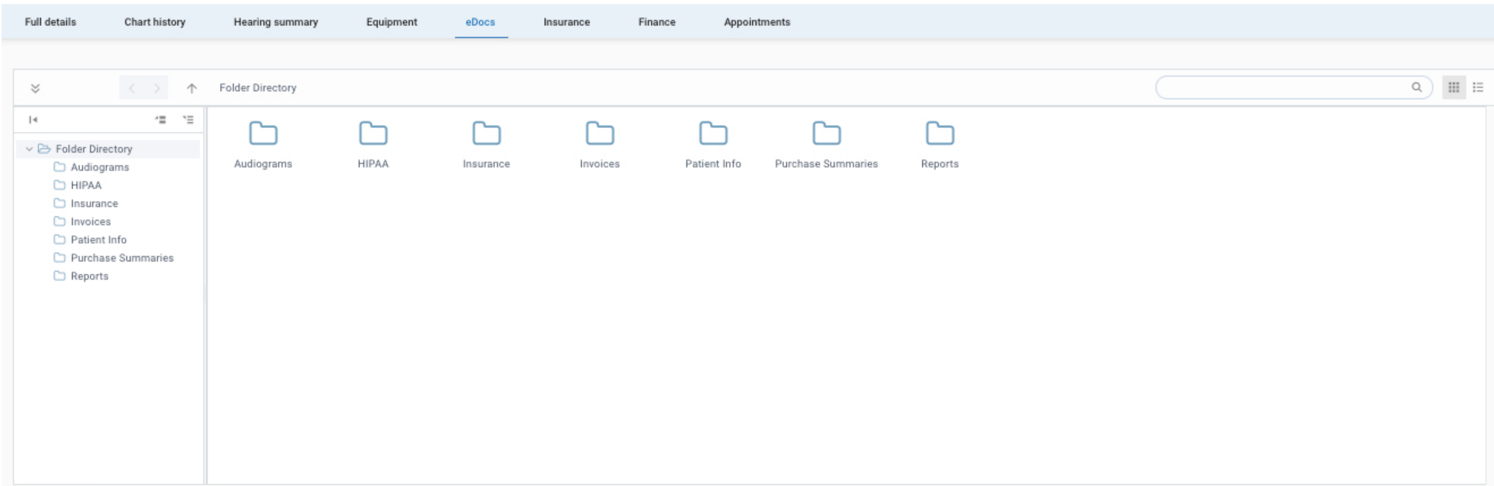
FULL PATIENT DETAIL

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.



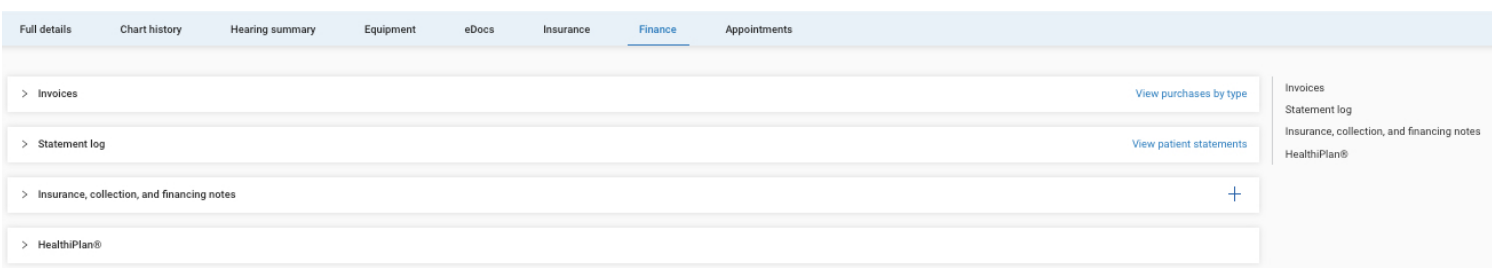
eDOCS

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



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**.

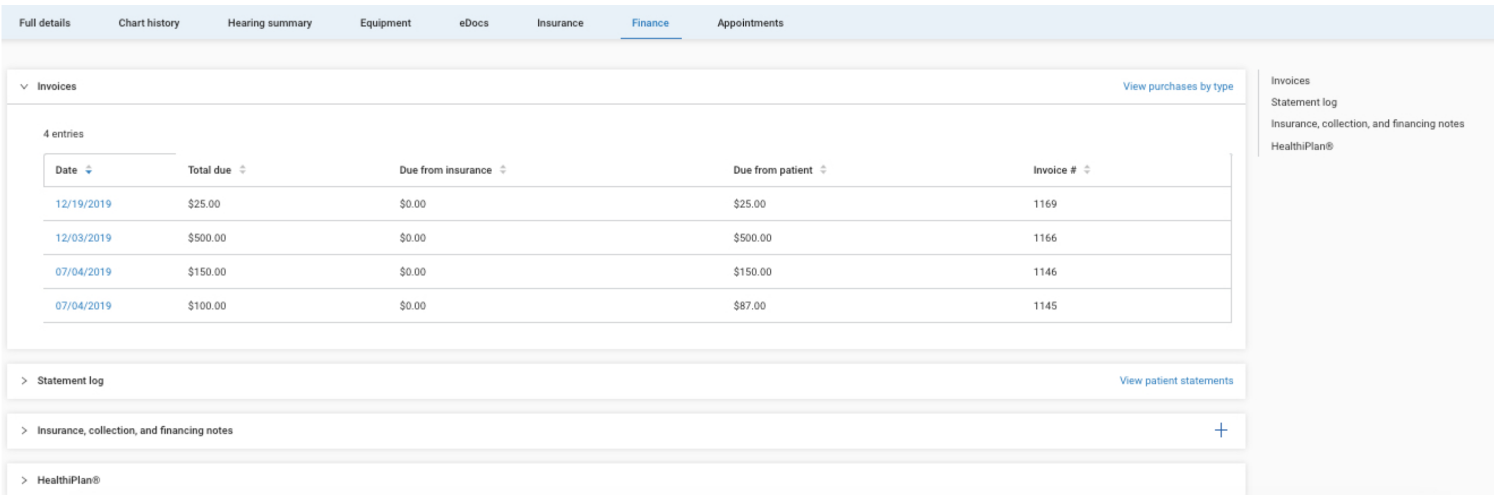
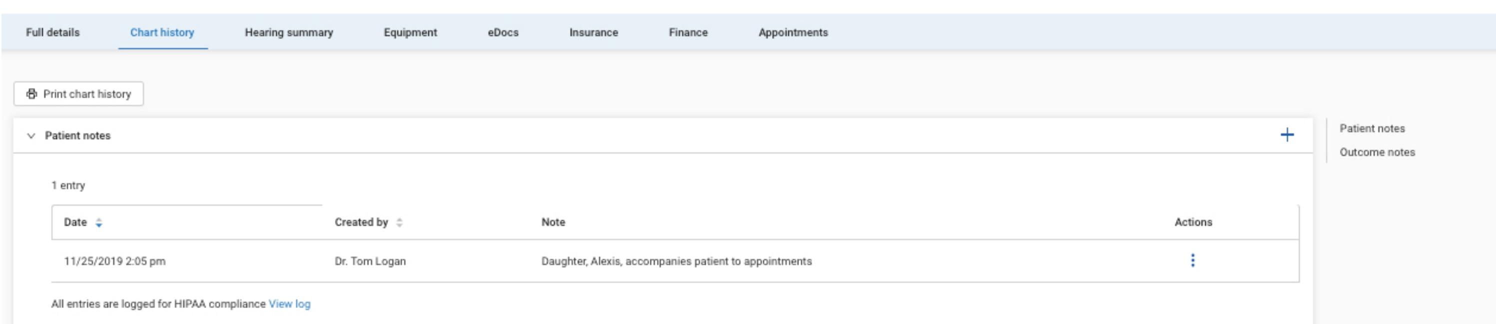


Chart History

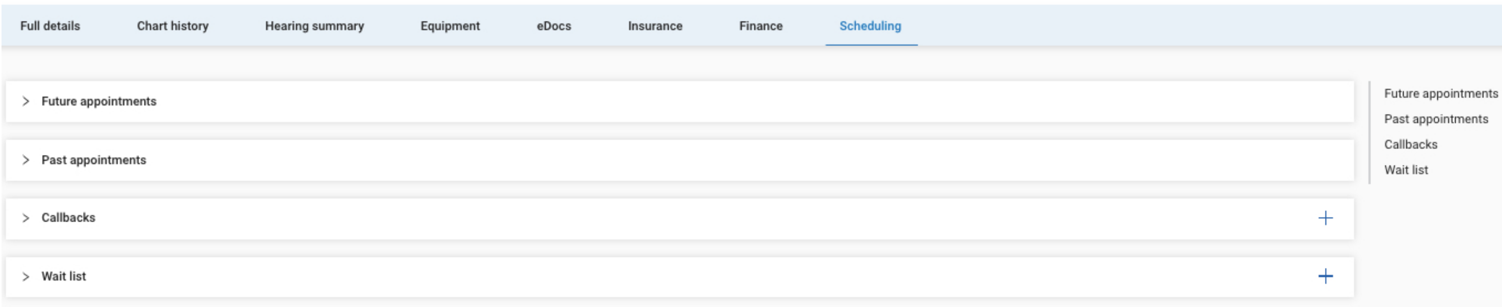
If you want to make a note on a patient without associating it with their appointment, add it here in the **Patient Notes**. For example, if you called a patient to discuss new technology, you could record what you discussed in this section. Once this information is added, it won't be deleted, and it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

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



SCHEDULING

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

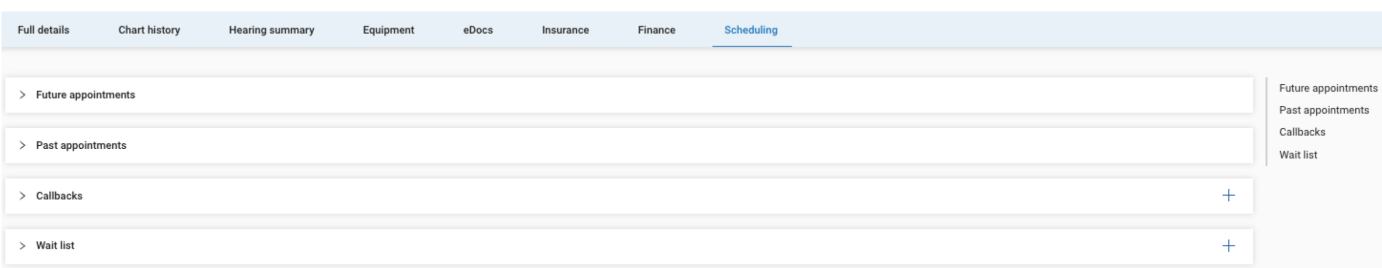


The **Future Appointments** section will contain any upcoming appointments scheduled for the patient.
The **Past Appointments** section will contain any previous appointments scheduled for the patient.
The **Waiting List** section will so if the patient has been added to the waiting list for an appointment.

- 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.**