

User Guide

The following pages are provided as a User Guide and are best read in the order listed. Once you have read through these pages, you should find Cycle easy to navigate and use.

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Sycle Overview (1) – Introduction

Sycle is designed to grow your business, not just watch it.

Sycle is a marketing and patient management system designed and built to increase lead generation, patient retention and overall practice productivity.

Marketing

The right message to the right person at the right time.

Sycle is an online, real-time, multi-location appointment scheduling and one-to-one marketing system. Sycle is totally unique—a Customer Relationship Management (CRM) marketing tool that combines the power of the Internet and database management with traditional, personalized, automatic event triggered direct mail. It systematically maintains your customer relationships for you, leaving you free to conduct business as usual.

In short, this means that every encounter you have with a patient triggers some sort of marketing event – usually a piece of personalized direct mail. Here are a few examples:

A hearing aid is purchased = a thank you letter is sent the next day, a clean and check card is sent bi-annually and a birthday card is sent a week before your patient's birthday. All you have to do is schedule your appointments and update your patient records.

A hearing loss is identified, but no hearing aid is purchased = this person will be included in a regular "Tested Not Sold" series of mailings, thus maintaining contact with a prospect who is likely to make a purchase in the next six to twelve months.

Patient Retention: The magic of Sycle is that while you manage your practice and care for patients on a daily basis, Sycle goes about maintaining your customer relationships for you. Each direct mail item is personalized, merged and mailed on your letterhead. Sycle provides the letters, or you can replace or add your own. Your current customers are your most valuable assets. In fact, **it costs six times less to maintain a current customer than to acquire a new one.** The hearing industry has been flat for some time, making customer retention more crucial than ever.

In addition to maintaining your current patient relationships, Cycle helps you organize and mail your prospect database, your monaural patients, your three-year plus patients, etc., all with the click of a mouse. No mailing house, no printing, no hassles. Or, if you prefer to create and mail your own messages, you can export your database in a flash and use your own mail house. Cycle makes it easy, whichever way you choose.

Patient Management

Cycle has robust patient management and reporting features. It allows you to securely maintain and manage one clinic or one hundred from anywhere at any time.

Cycle effortlessly maintains your patient records. As you make and complete each appointment, Cycle keeps track of every interaction: for every hearing aid purchased, the price, make and model are noted; every piece of direct mail a patient receives and every single appointment a patient has are recorded; associated notes are systematically included. Further, all of this information is simple to maintain and easy to access, since it is directly attached to each patient's record.

Reporting

Real-time reporting on key aspects of your business makes sure you stay on top. Management reports include: Revenue, Units Sold, Close Rate, Average Sale Price, Binaural Rate, Return Rate, Product Mix and Technology Level. These reports are automatically generated and always available in the "Reports" area. The instant nature of these reports allows you to make proactive decisions about where your business is going, instead of just reacting to where your business has been

Sycle Overview (2) – Log in



1. **LOGIN PAGE:** To use Sycle, you need to login at the start of each day. To do this, go to <http://www.sycle.net> and login. You can sign out at any time. You can also make Sycle your default landing page by selecting the following in your browser: Under “Tools”, select “Internet Options”; under the “General” tab’s home page option, type in <http://www.sycle.net>. Click on “Apply” then “OK” and Sycle.net will automatically load as your start page when you open your browser.

INTERNET EXPLORER 5.0: Sycle has been optimized for Explorer 5.0 or greater. Some functions and features will not work with other browsers. If you don’t have Internet Explorer 5.0, you can download it for free by going to:
<http://www.microsoft.com/windows/ie/downloads/ie6/default.asp>

2. **USER NAME:** Each User, whether a Provider, Receptionist, Office Administrator or Owner, will have a unique User Name and Password. Each User’s security level will determine which pages and features they can access. Users can be added and subtracted from a clinic in seconds on the administration page.
3. **PASSWORD:** Users can select their own password, and passwords can be easily changed on the administration page.



4. **SECURITY LEVELS:** There are five staff types to choose from: **Owner, Office Manager, Provider, Reception** and **Telemarketer**. **Note: Only staff members designated as Provider will appear on the schedule.** You can create security levels by selecting privileges for each staff member. For example, an Owner has all privileges checked which allows the Owner to create and delete all other Users, their passwords and their access privileges. Security Levels are set by accessing the Administration Section.

Cycle Overview (3) – Global Site Navigation

The screenshot displays the Cycle.net web application interface. At the top, there is a navigation bar with the following tabs: **appointments**, **reports**, **marketing**, and **administration**. A search bar is located at the top right, labeled "PATIENT SEARCH" with a "GO" button. The main content area is titled "January 14, 2003" and features a search section with "show clinic:" (Oak Ridge), "show provider:" (All Providers), "find appointment type:" (--Select One--), and "length:" (0 min). Below this is a calendar for January 2003, with the 14th highlighted. The main appointment table is divided into two columns for providers: James Mitchell and Christy Smith. The appointments are as follows:

Time	James Mitchell	Christy Smith
9:00 am		
9:15 am		
9:30 am	George Godard Hearing Aid Evaluation	Alice Beeler
9:45 am		
10:00 am		
10:15 am		
10:30 am		Beth Burrough Hearing Exam
10:45 am		
11:00 am		
11:15 am		
11:30 am		
11:45 am		
12:00 pm		
12:15 pm	John Adams	Andrea Franklin Hearing Exam
12:30 pm	James Broawn Hearing Exam	
12:45 pm		
1:00 pm		
1:15 pm		
1:30 pm		
1:45 pm		
2:00 pm		
2:15 pm		
2:30 pm		
2:45 pm		
3:00 pm		
3:15 pm		
3:30 pm		
3:45 pm		
4:00 pm		
4:15 pm		
4:30 pm		
4:45 pm		Tom Ashworth Fitting
5:00 pm		
5:15 pm		
5:30 pm		
5:45 pm		
6:00 pm		
6:15 pm		

On the left side of the interface, there are several summary sections:

- Printable Schedule:** All Providers, print...
- enter patient:** Add a new patient, search
- Wednesday, January 15 call list:**

Call List	Qty.
Confirmed	2
Not Confirmed	1
No Show	0
Reschedule	0
Fitting	4
Repair Pickup	3
- Tuesday, January 14 Printable Receipts:**

Purchases	Qty.
Today's Receipts	6
This Week's Receipts	7
- Hearing Aids Inventory:**

Inventory	Qty.
Out to Manufacturer	31
In from Manufacturer	12
- January 14, 2003 outgoing mail items:**

Mail	Qty.

1. **APPOINTMENTS:** This is the **default landing page** and the page used on a daily basis for making **appointments**, accessing your **call list**, managing **inventory**, printing **receipts**, monitoring **mail** items and conducting patient **searches**.
2. **REPORTS:** This will take you to **Management** (revenue, units sold, close rate, binaural rate, return rate and technology level), **Marketing** (total current patients, prospective patients, tested not sold, hearing aid purchase date, referral sources and appointment types). and **Sales Reports** (weekly and monthly sales and receipts, inventory, hearing aid sales, aging and open invoices).

Cycle Overview (3) – Global Site Navigation (cont.)

The screenshot shows the Cycle.net website interface. At the top left is the Cycle.net logo. In the top right corner, the user name "Sample" is displayed next to a "Sign Out" link. Below the logo, there are navigation links: "Help", "Sign Out", "Contact Us", and "Feedback". A secondary navigation bar contains icons and labels for "appointments", "reports", "marketing" (callout 3), and "administration" (callout 4). To the right of these is a "PATIENT SEARCH" section with an input field labeled "enter patient" and a "/GO/" button (callout 5). A date indicator shows "January 14, 2003". Below the navigation is a search filter section with dropdowns for "show clinic:" (Oak Ridge), "show provider:" (All Providers), "find appointment type:" (--Select One--), and "length:" (0 min). A "find next" button is also present. On the left is a calendar for January 2003, with the 14th highlighted. On the right is a table of appointments for James Mitchell and Christy Smith, with specific appointments like "George Godard Hearing Exam" and "Alice Beeler" listed.

3. **MARKETING:** This will take you to the marketing page, where you can review, edit and initiate all your **direct marketing**.
4. **ADMINISTRATION:** This takes you to the administration page, where you can: **create appointment types, service types, accessory types, discount types, earmold types, and warranty plans**; as well as **add referral sources, enter insurance companies and set hearing aid retail prices**. Also, you can **download your entire database into an Excel document, add staff members, set clinic hours, define security privileges and create user names and passwords**.
5. **PATIENT SEARCH:** Type the first few letters of a person's first or last name to create a short list of matches. If you have more than one clinic, you can use the **Global Search** or "**search all clinics**" feature to search for a patient in all of your clinics.
6. **LOGIN AREA:** This displays the **name** of the person currently logged in. The "**Sign Out**" link will end the session and require the next user to enter their user name and password. Please use the "**Feedback**" button to send any comments, problems or feature suggestions you have. The "**Help**" link will download the Cycle User Guide.

Cycle Overview (4) – Appointments

January 14, 2003

show clinic: Oak Ridge show provider: All Providers find appointment type: --Select One-- length: 0 min [find next](#)

1

Calendar: Jan 2003. Today: 14. Buttons: Week at a glance, Today.

Printable Schedule: All Providers [print...](#)

3

2

PATIENT SEARCH: enter patient [/GO/](#)

Time	James Mitchell	Christy Smith
9:00 am		
9:15 am		
9:30 am	George Godard Hearing Aid Evaluation	Alice Beeler
9:45 am		
10:00 am		
10:15 am		
10:30 am		
10:45 am		Beth Burrough Hearing Exam
11:00 am		
11:15 am		
11:30 am		
11:45 am		
12:00 pm		

Appointments – Main Navigation: Items 1 through 3.

1. **CALENDAR:** Select the date for an appointment by clicking on it. The calendar also includes a **Week-at-a-Glance** button, which displays booked appointments and openings. You can also make an appointment directly from the week-at-a glance view.
2. **SCHEDULE:** Once you've chosen an appointment date from the calendar, **click on the block that corresponds to the time you would like the appointment to start. This will activate the appointment making process.** From the Schedule page, you can click directly on a previously booked appointment to: confirm, cancel, reschedule, designate the appointment as a no show, view notes, print an intake or outcome form and enter the outcome of the appointment.
Note: Appointments have color coded triangles to identify confirmed, not confirmed, no show and completed appointments. You can locate the legend at the bottom of the appointment schedule page.
3. **PATIENT SEARCH:** Type the first few letters of a person's first or last name and click the search button to create a short list of matches. You can also leave the field blank and click on the **"search"** button to view the entire database; simply scroll down until you find your patient's name. To select your patient, click on the patient's name.

Cycle Overview (4) – Appointments (cont.)

cycle.net

Help | Sign Out | Contact Us | Feedback

appointments reports marketing administration PATIENT SEARCH

enter patient /GO/

Printable Schedule:
All Providers print...

enter patient search
Add a new patient

Wednesday, January 15 call list

Call List	Qty.
Confirmed	2
Not Confirmed	1
No Show	0
Reschedule	0
Fitting	4
Repair Pickup	3
Show all...	

Tuesday, January 14 Printable Receipts

Purchases	Qty.
Today's Receipts	6
This Week's Receipts	7

Hearing Aids

Inventory	Qty.
Out to Manufacturer	31
In from Manufacturer	12
Show all/Check In or Out...	

January 14, 2003 outgoing mail items

Mail	Qty.

11:00 am
11:15 am
11:30 am
11:45 am
12:00 pm
12:15 pm John Adams
12:30 pm James Broawn
12:45 pm James Broawn
1:00 pm
1:15 pm
1:30 pm
1:45 pm
2:00 pm
2:15 pm
2:30 pm
2:45 pm
3:00 pm
3:15 pm
3:30 pm
3:45 pm
4:00 pm
4:15 pm
4:30 pm
4:45 pm Tom Ashworth
5:00 pm Tom Ashworth
5:15 pm
5:30 pm
5:45 pm
6:00 pm
6:15 pm

Andrea Franklin
Hearing Exam

Tom Ashworth
Fitting

Appointments – Main Navigation: Items 4 through 7.

- CALL LIST:** Displays the number of appointments that are: **Not Confirmed, Confirmed, No Shows, Reschedules, Fittings** and **Repair Pickups**. Clicking anywhere on the call list will display a list of all the appointments to confirm for the following day.
Note: Friday's call list will display appointments scheduled for Saturday, Sunday, and Monday.
- PURCHASES:** Allows you to view receipts and payments for the day or for the week.
- INVENTORY:** Tracks newly ordered equipment and equipment sent for repair. Clicking on the **Show all/Check in or out...** lists the date the equipment was ordered or sent for repair, received, waiting to be delivered and date delivered.
- MAIL:** Displays the number of pieces and type of mail going out each day. By clicking on the mailbox, you will see which pieces are going to whom and have the option to deselect any and all that you wish. Mail items must be deselected by 8:00 p.m., or they will be mail merged and automatically sent that evening.

Cycle Overview (5) – Administration

show clinic:
Oak Ridge

<< Nov 2003 go >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	-15-
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Week at a glance Today

administration

[Appointment Types](#)
[Discount Types](#)
[Warranty/Service Plans](#)
[Service Types](#)
[Accessory Types](#)
[Earmold Types](#)
[Referral Sources](#)
[Referral Subcategories](#)
[Insurance Companies](#)
[Physician Backfill](#)
[Hearing Aid Prices](#)
[Database Backup](#)
[Telemarketing Admin](#)
[Do Not Call List](#)

clinics

Oak Ridge edit

1 **staff**

Brian Anderson edit

[Create a new staff member](#)

Scroll Up	Oak Ridge	Sandy Fischella	James Mitchell	Christy Smith
7:00 am				
7:15 am				
7:30 am				
7:45 am				
8:00 am				
8:15 am				
8:30 am				
8:45 am				
9:00 am				
9:15 am				
9:30 am				
9:45 am				
10:00 am				
10:15 am		patient appt in another clinic	Elaine Moore Hearing Exam	Heathe Jones Hearing Exam
10:30 am				
10:45 am				
11:00 am				
11:15 am				
11:30 am			Wendal Ross Hearing Exam	Cathy Brown Hearing Exam
11:45 am				
12:00 pm				
12:15 pm		Cliff Blow Fitting		
12:30 pm				
12:45 pm				
1:00 pm				
1:15 pm				
1:30 pm				
1:45 pm				
2:00 pm				
2:15 pm				

- CLINIC:** Each new clinic will be set up and given an owner password by Sycle. Once the initial set up is completed, you will be able to edit the **clinic's information** (address, phone number etc.) and select the clinic's **hours of operation**. These can be changed at any time. Select the clinic (if there is more than one in your group) and click on the "edit" button.
- STAFF:** The staff area allows you to **add and delete staff members**. Only staff members that are added as "**providers**" under the type pulldown will appear on the schedule. You can **assign and change passwords** for all employees as well as select access privileges. We recommend that you choose alpha-numeric passwords. For example: Whitney Price has the **username: whitney** and **her password: r3d**. (substitutue the number 3 for the letter "e").

staff save

Title: Ms.

First Name: Whitney

Last Name: Price

Provider Title: Other -- enter below
Director of Audiology

Home Phone Number: 303 774 9502

Cell Phone Number: 720 223 2343

Other Number: 0 0 0

Email: wprice@totalhea

Clinics: Default
 Oak Ridge
 Shady Oakes
 Happy Valley
 Maple View

Type: Provider

User Name: whitney

Password: ***

Password Again: ***

delete staff member

privileges

View Own Appointments

View All Providers' Appts

View Own Reports

View All Providers' Reports

Marketing

Telemarketing

Admin

Sycle Overview (5) – Administration (cont.)

show clinic:
Oak Ridge

<< Nov 2003 go >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
-16-	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

Week at a glance Today

administration

4 [Appointment Types](#)
[Discount Types](#)
[Warranty/Service Plans](#)
[Service Types](#)
[Accessory Types](#)
[Earmold Types](#)
[Referral Sources](#)
[Referral Subcategories](#)
[Insurance Companies](#)
[Physician Backfill](#)
[Hearing Aid Prices](#)
[Database Backup](#)
[Telemarketing Admin](#)
[Do Not Call List](#)

clinics

Oak Ridge edit

staff

Brian Anderson edit

[Create a new staff member](#)

Scroll Up	Oak Ridge	Sandy Fisichella	James Mitchell	Christy Smith
7:00 am				
7:15 am				
7:30 am				
7:45 am				
8:00 am				
8:15 am				
8:30 am				
8:45 am				
9:00 am	Staff Meeting	Staff Meeting	Staff Meeting	Staff Meeting
9:15 am				
9:30 am				
9:45 am				
10:00 am				
10:15 am		patient appt in another clinic	Elaine Moore Hearing Exam	Heathe Jones Hearing Exam
10:30 am				
10:45 am				
11:00 am				
11:15 am				
11:30 am			Wendal Ross Hearing Exam	Cathy Brown Hearing Exam
11:45 am				
12:00 pm				
12:15 pm		Cliff Blow Fitting		
12:30 pm				
12:45 pm				
1:00 pm				
1:15 pm				
1:30 pm				
1:45 pm				
2:00 pm				
2:15 pm				

3

3. **SCHEDULE:** The administration appointment schedule lets you **block time** from the schedule for an individual provider or **for the entire clinic**. You can also schedule patient appointments from the administration

4. **ADMINISTRATION:**

APPOINTMENT TYPES: This area allows you to **create and delete appointment types**, as well as define their **length of time** and the **color** in which they will appear on the schedule. You may choose colors to designate sales opportunities.

DISCOUNT TYPES: This allows you to **create discount types**, assign a **percentage discount** or a set a **dollar figure**. You can create as many as you like.

WARRANTY / SERVICE PLANS: This area allows you to create any service or extended warranty plans you wish to offer, including the **time**, **coverage** and **cost** of the plan.

SERVICE TYPES: This area allows you to set up any services you provide and charge for.

ACCESSORY TYPES: This area allows you to include accessories, ALDS and list their prices in the clinic's inventory.

EARMOLD TYPES: The default setting is Hearing Aid Earmold, you can add new earmold types in this area.

Sycle Overview (5) – Administration (cont.)

show clinic:
Oak Ridge

<< Nov 2003 go >>
Sun Mon Tue Wed Thu Fri Sat
1
2 3 4 5 6 7 8
9 10 11 12 13 14 -15-
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30
Week at a glance Today

administration

[Appointment Types](#)
[Discount Types](#)
[Warranty/Service Plans](#)
[Service Types](#)
[Accessory Types](#)
[Earmold Types](#)
[Referral Sources](#)
[Referral Subcategories](#)
[Insurance Companies](#)
[Physician Backfill](#)
[Hearing Aid Prices](#)
[Database Backup](#)
[Telemarketing Admin](#)
[Do Not Call List](#)

clinics

Oak Ridge edit

staff

Brian Anderson edit
[Create a new staff member](#)

Scroll Up	Oak Ridge	Sandy Fisichella	James Mitchell	Christy Smith
7:00 am				
7:15 am				
7:30 am				
7:45 am				
8:00 am				
8:15 am				
8:30 am				
8:45 am				
9:00 am				
9:15 am				
9:30 am				
9:45 am				
10:00 am				
10:15 am		patient appt in another clinic	Elaine Moore Hearing Exam	Heathe Jones Hearing Exam
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11:00 am				
11:15 am				
11:30 am			Wendal Ross Hearing Exam	Cathy Brown Hearing Exam
11:45 am				
12:00 pm				
12:15 pm		Cliff Blow Fitting		
12:30 pm				
12:45 pm				
1:00 pm				
1:15 pm				
1:30 pm				
1:45 pm				
2:00 pm				
2:15 pm				

Administration (Cont):

REFERRAL SOURCES: You can choose to use or deselect the default referral sources as well as add any additional referral sources.

REFERRAL SUBCATEGORIES: You can further customize your referral sources by adding subcategories. For example, you can choose newspaper as your referral source and add the name of your local newspapers in your referral subcategories.

INSURANCE COMPANIES: This area allows the user to enter insurance companies which are frequently used.

PHYSICIAN BACKFILL: Allows the administrator to record the names of physicians who have referred patients. New entries will appear in the Referral Source when making a new appointment.

HEARING AID PRICES: This area allows the administrator to utilize pulldowns to set up the retail and wholesale price for hearing aids.

DATABASE BACKUP: Clicking on database backup allows the user to download their entire database into an excel document to their desktop.

TELEMARKETING ADMIN: The telemarketing module along with the **Do Not Call** feature is detailed in the appendix B.

Cycle Overview (6) – Reports

1

cycle.net [Help](#) | [Sign Out](#) | [Contact Us](#) | [Feedback](#)

appointments reports marketing administration PATIENT SEARCH
 quick business weekly sales monthly sales HA sales total sales open invoices aging inventory referrals marketing appts

Choose: Nov 2003

quick business report by Oak Ridge **2** Clinic Stats **3** /GO/

4

GROSS REVENUES DOWNLOAD

	Nov 2003	QTD	YTD
Oak Ridge	\$94698	\$195515	\$974327

RETURN REVENUES DOWNLOAD

	Nov 2003	QTD	YTD
Oak Ridge	\$0	\$3600	\$119256

NET REVENUES DOWNLOAD FULL REPORT

	Nov 2003	QTD	YTD
Oak Ridge	\$94698	\$191915	\$855071

GROSS UNITS SOLD DOWNLOAD

	Nov 2003	QTD	YTD
Oak Ridge	43	89	393

UNITS RETURNED DOWNLOAD

	Nov 2003	QTD	YTD
Oak Ridge	0	2	58

(Partial view – All quick reports are on this page)

- 1. QUICK BUSINESS REPORT:** The quick business report provides a **snapshot** of the practice. It includes **benchmarks** for many of the categories based on industry averages. There are **twelve reports**: **Gross Revenues, Return Revenues, Net Revenues, Gross Units Sold, Units Returned, Net Units Sold, Close Rate, Average Sale Price, Binaural Rate, Return Rate, Product Mix.** and **Product Mix by Technology.**
- 2. CLINIC PULLDOWN:** If you have more than one clinic, you can use this pulldown menu to select an **individual clinic** or **“all clinics”**. This allows you to do a clinic-by-clinic comparison. Clinics are displayed with a blue background.
- 3. PROVIDER PULLDOWN:** You can choose an **individual provider** by selecting their name, or you can select **“all providers”**. This allows you to compare providers. Providers are displayed with a white background.
- 4. FULL REPORT:** By clicking on the **“Full Report”** button you will see a more detailed version of the selected Quick Business Report. **There is a Full Report for eight of the individual Quick Business Reports.**

Sycle Overview (6) – Reports (cont.)

6

Revenue Report - Product

5

Manufacturer

Start: Sep 01 2003
 End: Oct 30 2003

revenue report by All Clinics Total Sales Clinic Stats /GO/

DOWNLOAD ALL

Hearing Aids					
	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$137100	\$176296	\$748890	\$205016	\$58649
Shady Oakes	\$9200	\$0	\$26950	\$13300	\$28466
Happy Valley	\$0	\$10350	\$20945	\$-4045	\$21113
Maple View	\$0	\$7430	\$38535	\$20950	\$72022
All Clinics	\$146300	\$194076	\$835320	\$235221	\$180250

Batteries					
	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$31	\$163	\$1202	\$430	\$2354
Shady Oakes	\$0	\$0	\$20	\$20	\$12
Happy Valley	\$0	\$0	\$135	\$135	\$0
Maple View	\$0	\$0	\$19	\$0	\$2230
All Clinics	\$31	\$163	\$1376	\$585	\$4596

Repairs					
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(Partial view – All full reports are on this page)

- FULL REPORT:** Above is a Full Report for the Revenues section of the Quick Business Report. The Full Report has the date range pulldown allowing you to select specific date ranges by day, month and year Again, using the pulldown menus you can select individual clinics or “all clinics”. You can also select “clinic stats” or “all providers”.
- MANUFACTURER:** Clicking on the Manufacturer button will load a Full Report by Hearing Aid Manufacturer

Revenue Report - Manufacturer

Product

Start: Nov 01 2003
 End: Nov 30 2003

revenue report by All Clinics All Manufacturers Clinic Stats /GO/

DOWNLOAD ALL

Argosy					
	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$5680	\$2000	\$19168	\$-1200	\$960
Shady Oakes	\$0	\$0	\$0	\$0	\$3234
Happy Valley	\$0	\$0	\$0	\$0	\$0
Maple View	\$0	\$0	\$6000	\$6000	\$72
All Clinics	\$5680	\$2000	\$25168	\$4800	\$4266

Audibel					
	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$6920	\$12920	\$33553	\$8022	\$0
Shady Oakes	\$0	\$0	\$9250	\$0	\$0
Happy Valley	\$5400	\$3000	\$3000	\$0	\$0
Maple View	\$7430	\$7430	\$9430	\$0	\$0
All Clinics	\$19750	\$23350	\$55233	\$8022	\$0

Audina					
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Cycle Overview (6) – Reports (cont.)

Revenue Report - Product

Manufacturer
Start: Sep 01 2003
End: Oct 30 2003

revenue report by All Clinics Total Sales Clinic Stats /GO/

DOWNLOAD ALL

Hearing Aids DOWNLOAD

	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$137100	\$176296	\$748890	\$205016	\$58649
Shady Oakes	\$9200	\$0	\$26950	\$13300	\$28466
Happy Valley	\$0	\$10350	\$20945	-\$4045	\$21113
Maple View	\$0	\$7430	\$38535	\$20950	\$72022
All Clinics	\$146300	\$194076	\$835320	\$235221	\$180250

7

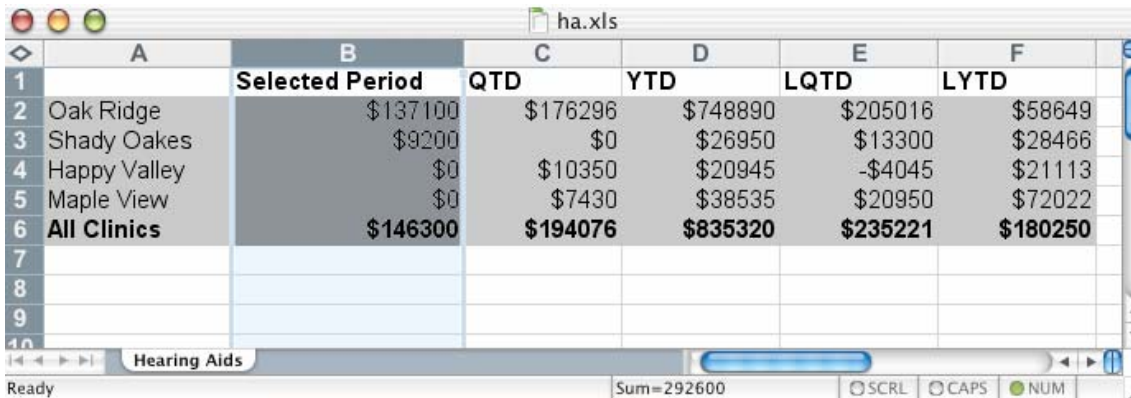
Batteries DOWNLOAD

	Selected Period	QTD	YTD	LQTD	LYTD
Oak Ridge	\$31	\$163	\$1202	\$430	\$2354
Shady Oakes	\$0	\$0	\$20	\$20	\$12
Happy Valley	\$0	\$0	\$135	\$135	\$0
Maple View	\$0	\$0	\$19	\$0	\$2230
All Clinics	\$31	\$163	\$1376	\$585	\$4596

Repairs DOWNLOAD

(Partial view – All full reports are on this page)

- 7. **DOWNLOAD** or **DOWNLOAD ALL**: All reports in Cycle feature **Download** and **Download all** buttons. This feature allows the user to download all or specific report information directly into an **Excel Document** onto your desktop. The approximate download time is 3 seconds.



Cycle Overview (6) – Reports (cont.)

Weekly Sales Report

Weekly Sales report for Week of:

[DOWNLOAD ALL](#)

Weekly Sales									DOWNLOAD
Sales	Sun Nov 9th	Mon Nov 10th	Tue Nov 11th	Wed Nov 12th	Thu Nov 13th	Fri Nov 14th	Sat Nov 15th	Total	
Hearing Aid	0 \$0.00	9 \$16,760.00	3 \$6,100.00	2 \$3,600.00	4 \$5,860.00	7 \$11,200.00	4 \$10,500.00	29 \$54,020.00	
Hearing Test	0 \$0.00	3 \$282.00	2 \$100.00	0 \$0.00	4 \$294.00	3 \$250.00	2 \$250.00	14 \$1,176.00	
Battery	0 \$0.00	9 \$75.89	0 \$0.00	0 \$0.00	4 \$0.00	3 \$0.00	0 \$0.00	16 \$75.89	
ALD	0 \$0.00	5 \$239.00	1 \$75.00	0 \$0.00	2 \$91.00	1 \$75.00	2 \$300.00	11 \$780.00	
Warranty	0 \$0.00	5 \$960.00	1 \$500.00	0 \$0.00	4 \$800.00	2 \$400.00	0 \$0.00	12 \$2,660.00	
Service	0 \$0.00	0 \$0.00	0 \$0.00	4 \$900.00	0 \$0.00	0 \$0.00	0 \$0.00	4 \$900.00	
Repair	0 \$0.00	0 \$0.00	0 \$0.00	1 \$185.00	0 \$0.00	0 \$0.00	0 \$0.00	1 \$185.00	
Earmold	1 \$10.00	4 \$129.00	1 \$0.00	0 \$0.00	3 \$50.00	3 \$0.00	0 \$0.00	12 \$189.00	
Sub Total	1 \$10.00	35 \$18,445.89	8 \$6,775.00	7 \$4,685.00	21 \$7,095.00	19 \$11,925.00	8 \$11,050.00	99 \$59,985.89	
Returns	(0) (\$0.00)	(2) (\$3,400.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(2) (\$3,400.00)	
Total	1 \$10.00	33 \$15,045.89	8 \$6,775.00	7 \$4,685.00	21 \$7,095.00	19 \$11,925.00	8 \$11,050.00	97 \$56,585.89	

(Partial view – All weekly reports follow below)

8. **WEEKLY SALES REPORT:** The **Weekly Sales Report** includes 4 subcategories: **Weekly Sales, Weekly Receipts, Weekly Appointments** and **Weekly Referrals**. The Weekly Sales Report allows the user to view a breakdown of weekly sales including repairs and returns. Using the pulldown you can **select the specific week** you would like to review.
- Following are all Weekly Reports: Weekly Receipts, Appointments and Referrals, each provides a detailed account of the week's activities.
- Note: All Weekly Reports have download buttons** to download the report into an Excel Document onto your desktop.

Cycle Overview (6) – Reports (cont.)

Weekly Receipts								
Receipts	Sun Nov 9th	Mon Nov 10th	Tue Nov 11th	Wed Nov 12th	Thu Nov 13th	Fri Nov 14th	Sat Nov 15th	Total
cash	\$0.00	\$5,210.45	\$1,000.00	\$40.00	\$200.00	\$29,224.00	\$2,320.00	\$37,994.45
visa	\$0.00	\$2,650.00	\$0.00	\$0.00	\$0.00	\$800.00	\$0.00	\$3,450.00
check	\$0.00	\$0.00	\$0.00	\$196.10	\$0.00	\$1,200.00	\$0.00	\$1,396.10
mc	\$0.00	\$290.00	\$0.00	\$0.00	\$0.00	\$238.00	\$0.00	\$528.00
discover	\$0.00	\$600.00	\$0.00	\$0.00	\$3,400.00	\$2,400.00	\$0.00	\$6,400.00
amex	\$0.00	\$3,600.00	\$1,275.00	\$0.00	\$1,000.00	\$4,400.00	\$6,650.00	\$16,925.00
other	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
insurance	\$0.00	\$0.00	\$270.00	\$0.00	\$0.00	\$0.00	\$0.00	\$270.00
beltone	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$12,350.45	\$2,545.00	\$236.10	\$4,600.00	\$38,262.00	\$8,970.00	\$66,963.55
HA Deposits	\$0.00	\$11,200.00	\$2,275.00	\$0.00	\$4,400.00	\$5,000.00	\$6,650.00	\$29,525.00

9. **WEEKLY RECEIPTS:** Provides a list of weekly receipts.
10. **RECEIPTS DETAILS:** Located on the weekly receipts is a “DETAILS” button. The “DETAILS” window provides a line item entry for each sale by receipt type. See below.

Weekly Receipts Detail Report

Weekly Receipts report for Week of:

10

cash				
Date	Clinic	Patient	Description	Amount
11/10/2003	Oak Ridge	Joe Schmuckatelli		\$3,200.00
11/10/2003	Oak Ridge	Sammy Davis		\$2,000.00
11/10/2003	Oak Ridge	Sammy Davis		\$10.45
11/11/2003	Oak Ridge	Patrice Avedon		\$1,000.00
11/12/2003	Oak Ridge	Bill Jones	copay	\$20.00
11/12/2003	Oak Ridge	John Hooker	co pay	\$20.00
11/13/2003	Oak Ridge	Heather Jones	partial payment	\$200.00
11/14/2003	Oak Ridge	Archibald Arsolon		\$23.00
11/14/2003	Oak Ridge	Billy Jean		\$1,180.00
11/14/2003	Oak Ridge	Carmine Bocho		\$12.00
11/14/2003	Oak Ridge	Jane Doe		\$1,535.00
11/14/2003	Oak Ridge	Jane Doe		\$0.00
11/14/2003	Oak Ridge	Migdalia Acevedo		\$2,252.00

visa				
Date	Clinic	Patient	Description	Amount
11/10/2003	Oak Ridge	Margaret Campbell		\$900.00
11/10/2003	Oak Ridge	Riley Rae		\$1,500.00
11/10/2003	Oak Ridge	Franky Avalon		\$250.00
11/14/2003	Oak Ridge	John Jones		\$800.00
Subtotal				\$3,450.00

check				
Date	Clinic	Patient	Description	Amount
11/12/2003	Oak Ridge	Barbara Anderson	1896	\$196.10
11/14/2003	Oak Ridge	Tiny Tim		\$1,200.00
Subtotal				\$1,396.10

mc				
Date	Clinic	Patient	Description	Amount
11/10/2003	Oak Ridge	Frank Bakko		\$290.00
11/14/2003	Oak Ridge	Joe 10		\$128.00
11/14/2003	Oak Ridge	Joe 10		\$110.00
Subtotal				\$528.00

Sycle Overview (6) – Reports (cont.)

11

Weekly Appointments								DOWNLOAD	
Appointments	Sun Nov 9th	Mon Nov 10th	Tue Nov 11th	Wed Nov 12th	Thu Nov 13th	Fri Nov 14th	Sat Nov 15th	Total	%
Speech-Language Eval	0	1	0	5	0	1	0	7	16%
Speech Language Therapy	0	1	0	0	0	0	0	1	2%
Sign-Language	0	0	0	0	0	0	0		0%
Repair	0	0	0	0	0	0	0		0%
Hearing Exam	0	6	2	1	4	2	4	19	44%
Hearing Aid Evaluation	0	0	1	3	0	3	2	9	21%
HAO	0	0	0	0	0	0	0		0%
Fluency Master	0	0	0	0	0	0	1	1	2%
Fitting	0	0	0	0	1	1	1	3	7%
Eye exam	0	0	0	0	0	2	0	2	5%
ENG	0	0	0	0	0	0	0		0%
Consultation	0	0	0	0	0	0	1	1	2%
Clean n Check > 3 yrs	0	0	0	0	0	0	0		0%
Totals	0	8	3	9	5	9	9	43	100%

11. **WEEKLY APPOINTMENTS:** Provides the user the number of appointments and a percentage breakdown of the types of appointments scheduled during any selected week.

12

Weekly Referral								DOWNLOAD	
Referral	Sun Nov 9th	Mon Nov 10th	Tue Nov 11th	Wed Nov 12th	Thu Nov 13th	Fri Nov 14th	Sat Nov 15th	Total	%
Yellow pages	0	0	0	0	0	0	0		0%
Walk-in	0	0	0	0	0	0	0		0%
TV	0	0	0	0	0	1	0	1	2%
Telemarketing	0	0	0	1	0	0	0	1	2%
Radio	0	0	0	0	0	0	0		0%
Presentation	0	1	0	3	0	0	1	5	12%
Physician Referral	0	4	0	2	0	1	0	7	16%
Patient Referral	0	0	0	0	0	0	0		0%
Online	0	0	0	0	0	0	0		0%
Newspaper	0	3	2	2	4	5	3	19	44%
Follow-up	0	0	1	0	1	1	3	6	14%
Direct Mailing	0	0	0	1	0	1	2	4	9%
Totals	0	8	3	9	5	9	9	43	100%

12. **WEEKLY REFERRAL:** Provides a snapshot of the patient referral source.

Note: The **REFERRAL REPORT** contains more detailed information on referral sources and completed appointments.

Cycle Overview (6) – Reports (cont.)

13

Monthly Sales Report

Choose: Nov 2003

Monthly Sales report for Oak Ridge Clinic Stats /GO/

[DOWNLOAD ALL](#)

Monthly Sales DOWNLOAD						
Sales	Week 1 Nov 1-7	Week 2 Nov 8-14	Week 3 Nov 15-21	Week 4 Nov 22-28	Week 5 Nov 29-30	Total
Hearing Aid	10 \$20,046.00	24 \$41,920.00	9 \$22,180.00	0 \$0.00	0 \$0.00	43 \$84,146.00
Earmold	4 \$50.00	13 \$189.00	4 \$1,100.00	0 \$0.00	0 \$0.00	21 \$1,339.00
Hearing Test	7 \$825.00	12 \$926.00	5 \$620.00	0 \$0.00	0 \$0.00	24 \$2,371.00
Battery	6 \$16.00	16 \$75.89	4 \$50.00	0 \$0.00	0 \$0.00	26 \$141.89
ALD	6 \$1,444.00	9 \$480.00	4 \$536.00	0 \$0.00	0 \$0.00	19 \$2,460.00
Warranty	6 \$671.00	12 \$2,660.00	2 \$400.00	0 \$0.00	0 \$0.00	20 \$3,731.00
Service	4 \$245.00	4 \$900.00	0 \$0.00	0 \$0.00	0 \$0.00	8 \$1,145.00
Repair	0 \$0.00	3 \$365.00	0 \$0.00	0 \$0.00	0 \$0.00	3 \$365.00
Sub Total	43 \$23,297.00	93 \$47,515.89	28 \$24,886.00	0 \$0.00	0 \$0.00	164 \$95,698.89
Returns	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)	(0) (\$0.00)
Total	43 \$23,297.00	93 \$47,515.89	28 \$24,886.00	0 \$0.00	0 \$0.00	164 \$95,698.89

(Partial view)

16. MONTHLY SALES REPORT: Like the Weekly Sales Report, there are four subcategories within the Monthly Sales Report: **the Monthly Sales, Monthly Receipts, Monthly Appointments and Monthly Referrals**. The **Monthly Receipts Report** has the same “DETAILS” button as the **Weekly Receipts**. (to see more information on the Details feature or on any of the Monthly Sales Report subcategories please review subcategories for Weekly Sales Report).

The **Monthly Sales Report** allows the user to view a particular month’s sales including repairs and returns. Using the pulldowns you can **select the specific month** you would like to review. **You can also select an individual clinic or all clinics and an individual provider or clinic stats.**

Cycle Overview (6) – Reports (cont.)

15

Oak Ridge | Christy Smith

[DOWNLOAD](#)

Sales								
<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient Name</u>	<u>Office</u>	<u>Ref Src</u>	<u>Units</u>	<u>Manufacturer</u>	<u>Model</u>	<u>Type</u>
09/05/2003	Christy Smith	Adelle Smith	Oak Ridge	Newspaper	1	Argosy	Other	BTE
09/11/2003	Christy Smith	Franky Avalon	Oak Ridge	Newspaper	1	Beltone	Ode ClearVoice ANF	ITC
09/12/2003	Christy Smith	Geri Lapierre	Oak Ridge	Walk-in	2	Beltone	Opera Plus K-P	ITC
09/13/2003	Christy Smith	Jim Outsman	Oak Ridge	Newspaper	1	Widex	Bravo	CIC
09/15/2003	Christy Smith	Kathy Hill	Oak Ridge	Newspaper	1	Phonak	Claro 22	ITC
09/16/2003	Christy Smith	Mariano2 Current	Oak Ridge	Online	1	AVR Sonovation	Other	ITE
09/20/2003	Christy Smith	Mariano Ferrario	Oak Ridge	Follow-up	1	Audiovox	PA76	BTE
09/28/2003	Christy Smith	Bob Wachtel	Oak Ridge	Newspaper	1	Audina	Nueve	ITC
09/30/2003	Christy Smith	Beth Smith	Oak Ridge	Direct Mailing	2	Beltone	Invisa - Oria Oria	CIC BTE
Totals:					11			

Returns								
<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient Name</u>	<u>Office</u>	<u>Ref Src</u>	<u>Units</u>	<u>Manufacturer</u>	<u>Model</u>	<u>Type</u>
09/05/2003	Christy Smith	Adelle Smith	Oak Ridge	Newspaper	1	Argosy	Other	BTE
Totals:					1			

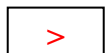
Exchanges								
<u>Old/ New</u>	<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient Name</u>	<u>Office</u>	<u>Ref Src</u>	<u>Units</u>	<u>Manufacturer</u>	<u>Model</u>
Totals:					0			

(Partial view, Right-hand side Hearing Aid Sales Report)

17. HA SALES REPORT: The Hearing Aid Sales Report provides the user with detailed sales information. The sales information can be sorted by clicking on the column headings underlined in blue type: **Sale Date, Provider Name, Clinic (Office), Manufacturer, Model, Type, Technology, Gross Price, Discount, Net Price, Initial Payment, Insurance Payment, Fees, Balance Paid, Balance Due and Last Date Paid.**

You can specify the month and year using the pull-downs and you have the option to view an **individual clinic** or **“all clinics”** and an **individual provider** or **all providers**. (The above Hearing Aid Sales Report accounts sales for September 2003 for the provider: Christy Smith at the Oak Ridge Clinic).

Cycle Overview (6) – Reports (cont.)



Tech	Gross Price	Discount	Net Price	Initial Payment	Insurance Payment	Fees	Balance Paid	Balance Due	Last Date Paid
Digital	\$1,300.00	\$260.00	\$1,040.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$0.00	09/05/2003
Analog	\$6,000.00	\$0.00	\$6,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,000.00	
Programmable	\$3,890.00	\$0.00	\$3,890.00	\$1,890.00	\$0.00	\$0.00	\$3,890.00	\$0.00	09/12/2003
Digital	\$3,000.00	\$600.00	\$2,400.00	\$2,000.00	\$0.00	\$0.00	\$2,000.00	\$400.00	09/13/2003
Digital	\$2,800.00	\$0.00	\$2,800.00	\$2,800.00	\$0.00	\$0.00	\$2,800.00	\$0.00	09/16/2003
Analog	\$5,000.00	\$0.00	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$10.00	09/16/2003
Analog	\$100.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	
Digital	\$3,000.00	\$0.00	\$3,000.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$2,000.00	09/28/2003
Digital	\$7,400.00	\$1,200.00	\$6,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,200.00	
Totals:	\$32,490.00	\$2,060.00	\$30,430.00	\$13,690.00	\$0.00	\$0.00	\$15,690.00	\$14,710.00	

Tech	Gross Price	Discount	Net Price	Initial Payment	Insurance Payment	Fees	Balance Paid	Balance Due	Return Date
Digital	\$1,300.00	\$260.00	\$1,040.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$0.00	09/05/2003
Totals:	\$1,300.00	\$260.00	\$1,040.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	\$0.00	

Type	Tech	Gross Price	Discount	Net Price	Initial Payment	Insurance Payment	Fees	Exchange Balance	Balance Due	Last Date Paid
	Totals:	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

(Left-hand side of Hearing Aid Sales Report)

HA SALES REPORT (Cont): The Hearing Aid Sales Report also shows any **Discount** given to the patient, the **Net Payment**, **Cost**, **Deposit**, **Insurance Payment**, **Balance Due** and **Date of Last Payment**. Hearing Aid **Returns** and **Exchanges** are also organized and can be sorted by clicking on the column headings.

18. **DOWNLOAD:** Allows the user to download the HA Sales Report directly into an Excel document onto their desktop.

Cycle Overview (6) – Reports (cont.)

Oak Ridge | Christy Smith

[DOWNLOAD](#)

17

Total Sales										
<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient's Name</u>	<u>Office</u>	<u>Type</u>	<u>Description</u>	<u>Notes</u>	<u>Gross Price</u>	<u>Discount</u>	<u>Net Price</u>	<u>Insurance Estimate</u>
07/05/2003	Christy Smith	billy bob	Oak Ridge	Left Warranty			\$0.00	\$0.00	\$169.99	\$0.00
07/05/2003	Christy Smith	billy bob	Oak Ridge	Right Warranty			\$0.00	\$0.00	\$169.99	\$0.00
07/08/2003	Christy Smith	Wes Cole	Oak Ridge	Right Hearing Aid	Beltone Supremo BTE Conventional		\$2,200.00	\$440.00	\$1,760.00	\$425.00
07/08/2003	Christy Smith	Wes Cole	Oak Ridge	Right Earmold	Hearing Aid Earmold		\$0.00	\$0.00	\$0.00	\$425.00
07/08/2003	Christy Smith	Wes Cole	Oak Ridge	Battery	Beltone B900PA 675		\$20.00	\$0.00	\$20.00	\$425.00
07/09/2003	Christy Smith	Johnny Rogers	Oak Ridge	Accessory	Telephone		\$0.00	\$0.00	\$75.00	\$0.00
07/09/2003	Christy Smith	Ken Dryden	Oak Ridge	Left Hearing Aid	Beltone Alto Super Max ITE Analog		\$2,000.00	\$200.00	\$1,800.00	\$0.00
Total Returns										
<u>Sale Date</u>	<u>Provider Name</u>	<u>Patient's Name</u>	<u>Office</u>	<u>Type</u>	<u>Description</u>	<u>Notes</u>	<u>Gross Price</u>	<u>Discount</u>	<u>Net Price</u>	<u>Insurance Estimate</u>
01/14/2003	Christy Smith	Alice Beeler	Oak Ridge	Left Hearing Aid	Beltone Invisa - Polara CIC Digital S/N: 789		\$2,025.00	\$0.00	\$2,025.00	\$0.00
02/21/2003	Christy Smith	Franky Avalon	Oak Ridge	Right Hearing Aid	Beltone Ultima 80 BTE Non-programmable S/N: 2345		\$2,000.00	\$400.00	\$1,600.00	\$0.00
07/10/2003	Christy Smith	Eugene Mills	Oak Ridge	Left Hearing Aid	Beltone Optima - Lumina ITE Digital		\$2,000.00	\$200.00	\$1,800.00	\$0.00
07/10/2003	Christy Smith	Eugene Mills	Oak Ridge	Right Hearing Aid	Beltone Optima - Lumina ITE Digital		\$2,000.00	\$200.00	\$1,800.00	\$0.00
TOTAL:							\$8,025.00	\$800.00	\$7,225.00	\$0.00

17. **TOTAL SALES REPORT:** Allows the user to see all sales made – including **hearing aids, warranties and service plans, repairs, batteries and accessories**. You can specify the month using the pulldowns and you have the option to view **an individual clinic or “all clinics” and an individual provider or all providers**. You can sort information by clicking on the underlined column headings in blue type: **Sale Date, ProviderName, Patient’s Name, Office, Type or Gross Price**
18. **DOWNLOAD:** Allows you to download the **Total Sales Report** directly into an **Excel Document** onto your desktop.

Cycle Overview (6) – Reports (cont.)

Open Invoice Report

Parent Company: Test Company
 Clinics: Oak Ridge
 Shady Oakes
 Happy Valley
 Maple View

[View Report](#)
[Download](#)

Total Balance Due: \$ 76555.5

Open Invoices						
Clinic	First	Last	Purchase Date	Net Price	Amount Paid	Balance Due
Maple View	Agnes	Smith	04/19/2002	<u>\$4,934.00</u>	\$0.00	\$4,934.00
Maple View	Mariano	Ferrario	04/25/2002	<u>\$1,200.00</u>	\$0.00	\$1,200.00
Maple View	Janet	Dubosk	04/30/2002	<u>\$1,350.00</u>	\$0.00	\$1,350.00
Maple View	Mariano	Ferrario	04/30/2002	<u>\$1,350.00</u>	\$800.00	\$550.00
Maple View	Mariano	Ferrario	05/02/2002	<u>\$1,000.00</u>	\$0.00	\$1,000.00
Maple View	carry	water	05/05/2002	<u>\$3,480.00</u>	\$0.00	\$3,480.00
Maple View	joe	smith	05/08/2002	<u>\$6,000.00</u>	\$0.00	\$6,000.00
Maple View	Alan	Smith	05/15/2002	<u>\$1,800.00</u>	\$0.00	\$1,800.00
Maple View	Agnes	Smith	05/24/2002	<u>\$1,250.00</u>	\$0.00	\$1,250.00
Maple View	Mary	Jones	06/11/2002	<u>\$1,924.00</u>	\$0.00	\$1,924.00

(Partial view)

19. **OPEN INVOICE REPORT:** The Open Invoice Report provides the user with a cumulative list of all Open Invoices: the **Patient's first and last name**, the **Purchase Date**, the **Net Price**, **Amount Paid** and **Balance Due**. Clicking on the amount underlined in blue in the **Net Price column (a)** will load the corresponding Receipt window. (See below). You can take payments from the Open Invoices Report.

a.

Receipt

Patient: Agnes Smith
 123 Main St.
 San Francisco, CA 94133
 (415) 555-1234

Maple View
 Maple View Hearing Care
 1077 South Wright Road
 Santa Rosa, CA 95407
 (415) 412-2412
 (800) 555-4444
 Provider: **Christy Smith**
 Date: **04/19/2002**
 Tracking #:

Quantity	Item	Description	Cost	Amount
		Other ()		\$70.00
		Other ()		\$70.00
1	Battery	Battery: Energizer 675		\$26.00
2	Battery	Battery: Energizer 675		\$68.00
1	Right Hearing Aid	Phonak Claro 311 dAZ BTE Digital Discount: \$250.00 (Trade In)	\$2,500.00	\$2,250.00
1	Left Hearing Aid	Phonak Claro 311 dAZ BTE Digital Discount: \$250.00 (Trade In)	\$2,500.00	\$2,250.00
1	Warranty	Left Extended Service Plan: Favorite Patient		\$100.00
1	Warranty	Right Extended Service Plan: Favorite Patient		\$100.00
Total				\$4934.00
Sales Tax				\$0.00
Grand Total				\$4934.00
Amount Due				\$4934.00

[payment](#) [fee](#)

[add](#) [edit](#) [print](#) [close](#)

Cycle Overview (6) – Reports (cont.)

The screenshot shows the top navigation bar of the cycle.net software. It includes the logo on the left and navigation links for Help, Sign Out, Contact Us, and Feedback on the right. Below the logo is a menu with categories: appointments, reports, marketing, and administration. Under 'reports', there are sub-menus for quick business, weekly sales, monthly sales, HA sales, total sales, open invoices, and aging (which is highlighted). A 'PATIENT SEARCH' bar is visible with the text 'enter patient' and a '/GO/' button.

19

A/R Aging Report

Parent Company: Test Company

- Clinics:
- Oak Ridge
 - Shady Oakes
 - Happy Valley
 - Maple View

View Report
Download

print all statements

A/R Aging							
Patient	Clinic	0-30	31-60	61-90	>90	TOTAL	Action
BOND, JAMES							Statement
2002-12-18	Maple View	\$0.00	\$0.00	\$0.00	\$199.00	\$199.00	Receipt
2003-05-01	Maple View	\$0.00	\$0.00	\$0.00	\$2,000.00	\$2,000.00	Receipt
Total BOND, JAMES		\$0.00	\$0.00	\$0.00	\$2,199.00	\$2,199.00	
CARTER, WILA							Statement
2003-07-15	Maple View	\$0.00	\$0.00	\$0.00	\$6,000.00	\$6,000.00	Receipt
Total CARTER, WILA		\$0.00	\$0.00	\$0.00	\$6,000.00	\$6,000.00	
CLAYBORN, CLIFF							Statement
2003-02-04	Maple View	\$0.00	\$0.00	\$0.00	\$4,000.00	\$4,000.00	Receipt
2003-02-04	Maple View	\$0.00	\$0.00	\$0.00	\$4,000.00	\$4,000.00	Receipt

a
h

19. AGING REPORT: Provides the user with an aged receivables account. You can print an individual statement or all statements as well as view individual statements and take payments.

Statement

Maple View
Maple View Hearing Care
1077 South Wright Road
Santa Rosa, CA 95407
(415) 412-2412
(800) 555-4444
Date: 11/22/2003

To: James Bond
007 Gunbarrel Way
San Francisco, CA 94133

Date	Transaction	Amount	Balance
12/18/2002	Warranty: 2	\$199.00	\$199.00
05/01/2003	Hearing Aid: 1	\$2,000.00	\$2,000.00

0-30 Days	31-60 Days	61-90 Days	Over 90 Days	Amount Due
\$0.00	\$0.00	\$0.00	\$2,199.00	\$2,199.00

print close

payments

add edit print close

date	description	amount	balance
12/18/2002	Warranty: 2	\$199.00	\$199.00
05/01/2003	Hearing Aid: 1	\$2,000.00	\$2,000.00
			\$2,199.00

San Francisco, CA 94133
007 Gunbarrel Way
James Bond

Tracking #: 0210713003
Invoice #: 0210713003
(800) 555-4444
(415) 412-2412
Maple View Hearing Care
1077 South Wright Road
Santa Rosa, CA 95407

receipt

h

Cycle Overview (6) – Reports (cont.)

cycle.net Help | Sign Out | Contact Us | Sample Feedback

appointments reports marketing administration PATIENT SEARCH
 quick business weekly sales monthly sales HA sales total sales open invoices aging inventory referrals marketing appts
 enter patient /GO/

Inventory Report

report by /GO/

Hearing aids and earmolds checked in from the manufacturer but not yet delivered

Oak Ridge

Hearing Aid and Earmold Purchases										
<u>Sale Date</u>	<u>Arrival Date</u>	<u>BTE Earmold In</u>	<u>Provider</u>	<u>Patient</u>	<u>Office</u>	<u>Equipment</u>	<u>Ear S/N</u>	<u>Description</u>	<u>Purchase Price</u>	
10/07/2002	11/03/2002	N/A	Arlene Coolidge	John Farmer	Maple View	Argosy ARM2DG BTE Digital	L 1313545313		\$72.50	
07/10/2003	11/18/2003	N/A	Randy Rivers	John Tester	Happy Valley	Starkey Sequel II CIC Digital	R 3456		\$1,600.00	
01/01/2004	10/20/2003	Y	Sandy Fisichella	Agnes Johnson	Shady Oakes	Phonak Aero BTE Digital	L		\$2,200.00	
01/01/2004	10/20/2003	Y	Sandy Fisichella	Agnes Johnson	Shady Oakes	Phonak Aero BTE Digital	R		\$2,200.00	
11/06/2003	11/06/2003	N/A	Whitney Price	Janet Dubosk	Maple View	Audibel Eclipse CIC Digital	L 123456		\$2,150.00	

Hearing Aid Repairs										
<u>Sale Date</u>	<u>Arrival Date</u>	<u>BTE Earmold In</u>	<u>Provider</u>	<u>Patient</u>	<u>Office</u>	<u>Equipment</u>	<u>Ear S/N</u>	<u>Description</u>	<u>Purchase Price</u>	
02/20/2003	10/20/2003	N/A	Beth Tribble	Cindy ellison	Shady Oakes		R			beltone
11/11/2003	11/11/2003	N/A	Christy Smith	Barbara Anderson	Oak Ridge		R 03456789			resound canta7 sn: 03456789

20. **INVENTORY REPORT:** Creates a detailed account of all hearing aids that have been checked in from the manufacturer but have not yet been delivered to the patient. Both **Hearing Aid Purchases** and **Hearing Aid Repairs** are listed. Like the other reports, using the pull-downs, you can view an individual clinic or “all clinics” and an individual provider or all providers. You can also **sort inventory information** by clicking column headings underlined in blue type: **Sale Date**, **Arrival Date**, **Provider**, **Patient**, **Office** or **Purchase Price**.

Sale Date	Arrival Date	Provider	Patient	Office	Equipment	Ear S/N	Description	Discount Price
2003-05-08	2003-05-08	Landon Binstock	Harry Belafonte	Oak Ridge	Beltone Invisa - Silica CIC Digital	L 65485		\$1600.00
2003-05-13	2003-05-13	Landon Binstock	Willie Mays	Oak Ridge	Futuretone FTCS ITC Analog	L 12345667778		\$800.00
2003-05-13	2003-05-13	Lea Koch	Ken Dryden	Oak Ridge	Beltone Invisa DHI CIC Conventional	L 452		\$1600.00
2003-05-27	2003-05-27	Lea Koch	Spyder Mann	Oak Ridge	Beltone Supremo BTE Conventional	R 2452		\$1600.00
2003-05-27	2003-05-27	Landon Binstock	Farrah Fawcett	Oak Ridge	Beltone Invisa - Dria CIC Digital	L 8798987698		\$7600.00
2003-05-29	2003-05-29	Landon Binstock	Dennis Franz	Oak Ridge	Beltone Invisa - Polara CIC Digital	L 2345		\$1600.00
TOTAL:								\$14800.00

21. **DOWNLOAD:** Allows you to download the **Inventory Report** directly into an **Excel Document** onto your desktop.

Cycle Overview (6) – Reports (cont.)

21

Start: Nov 01 2003
End: Nov 30 2003

Referral Report For: Oak Ridge Clinic Stats /GO/

22

Referral Report for Oak Ridge

Referral Source	Count	Cancelled	Completed	Sales Ops	Sales Ops with Test	TNS	No Loss	Units Sold	Purchase Ratio
Follow-up	25	1	10	7	3	1	0	3	21%
Telemarketing	1	0	1	1	1	0	0	2	100%
Direct Mailing	15	2	8	5	5	4	0	5	50%
Walk-in	0	0	0	0	0	0	0	0	0%
Yellow pages	2	0	2	2	2	0	0	3	75%
Physician Referral	12	1	8	6	6	0	0	11	92%
Newspaper	71	3	48	47	47	4	0	55	59%
Radio	2	1	1	1	0	0	1	0	0%
Patient Referral	4	0	3	3	3	2	0	1	17%
Online	4	0	2	2	1	0	1	1	25%
TV	1	0	0	0	0	0	0	0	0%
Presentation	10	0	8	1	1	1	0	0	0%
Total	147	8	91	75	69	12	2	81	54%

22. **REFERRAL REPORT:** Provides the user with a detailed account of all referral sources. This allows the user to **analyze the effectiveness of their advertising dollars in terms of referrals and purchase ratio**. It identifies sales opportunities and tested not sold appointments. Using the pulldowns you have the option to view an individual clinic or “all clinics” and an individual provider or “all providers”.

Sycle Overview (6) – Reports (cont.)

Referral Source Details - Newspaper

22

Referral Report for Newspaper in Oak Ridge										
Subcategory	Description	Count	Cancelled	Completed	Sales Ops	Sales Ops with Test	TNS	No Loss	Units Sold	Purchase Ratio
		10	2	2	2	2	0	0	2	50%
	Denver Post	2	0	2	2	2	0	0	2	50%
Boulder Daily Camera		5	0	3	2	2	0	0	4	100%
Denver Post		3		1	1	1	0	0	1	50%
Denver Post	Christmas special	2		2	2	2	1	0	1	25%
Denver Post	Holiday special	1	0	1	1	1	0	0	1	50%
San Jose Mercury News		8	0	3	3	3	0	0	4	67%
Chicago Times		20	1	18	18	18	2	0	19	53%
Chicago Tribune		6	0	5	5	5	1	0	5	50%
Chicago Tribune	10/04/03	1	0	1	1	1	0	0	1	50%
Cuban Review		9	0	8	8	8	0	0	13	81%
Cuban Review	11/24/03	1	0	1	1	1	0	0	1	50%
Cuban Review	Ad on Nov 10	1	0	1	1	1	0	0	1	50%
Total		69	3	48	47	47	4	0	55	59%

24

23. **REFERRAL REPORT DETAIL:** You can click on the any of the referral sources in the Referral Report to **view referral subcategories** (Referral Sources and Referral Subcategories are created in the Administration Section). Clicking on the number “2” in the “count” column for Denver Post Christmas Special will load the Report Detail List. (see below)

Referral Report Detail List

All Appointments With Referral Source of Newspaper-Denver Post for All Providers in Oak Ridge

<u>Patient</u>	<u>Clinic</u>	<u>Staff</u>	<u>Status</u>	<u>Subcat</u>	<u>Desc</u>	<u>Appt Date</u>	<u>Appt Type</u>	<u>Sales Op</u>	<u>Left Loss</u>	<u>Right Loss</u>	<u>Units Sold</u>
Heather Jones	Oak Ridge	Christy Smith	Completed	Denver Post	Christmas special	11/13/2003	Hearing Exam	Y	Level 4 - Severe	Level 5 - Profound	0
Elaine Moore	Oak Ridge	James Mitchell	Completed	Denver Post	Christmas special	11/13/2003	Hearing Exam	Y	Level 4 - Severe	Level 4 - Severe	1

24. **REFERRAL REPORT DETAIL LIST:** Gives the user a list of patients, which patient tested for a hearing loss, their level of hearing loss and units sold. As on other reports, information can be sorted by column headings appearing underlined in blue type.
25. **DOWNLOAD:** Lets you download the Referral Report into an Excel document onto your desktop.

Cycle Overview (6) – Reports (cont.)

Marketing Report

Report Type: Birthdates

Select Birth Month: Sep

Patient Type: Prospect Current Competitive

Parent Company: Tested

Clinics: Oak Ridge Shady Oakes Happy Valley Maple View

View Report Download

Birthdates_Oak Ridge DOWNLOAD

First	Last	Preferred	Date of Birth	Purchase Date	Address1	Address2	City	State	Zip	Area Code	Phone	Do Not Mail	Do Not Call	HIPAA Waiver Signed
Janet	Linde	Jan	09/05/1934	06/02/2003	345 Main Street		Stockton	CA	94568	415	555-1475			
Simon	Bernstein	Simon	09/07/1932	03/26/2003	2 Ashton Way		San Francisco	CA	94123	415	245-6745			
George	Smith		09/01/1934	04/15/2003	2 Round Street		Auburn	MA	01501	508	555-1234			
Anna	Woodworth		09/05/1915	10/02/2003	411 Valley Road		Sumner	ME	04292	207	358-2323			X

20. MARKETING REPORT: The Marketing Report allows the user to organize and download mailing lists in the following categories: **Birthdates, Purchase Dates, Consultant, Zip Code, Consultant and Purchase Date, Patient Type, Tested Not Sold and Manufacturer Warranty Expiration.** You can select as many clinics as you wish and select specific months (and date ranges on most marketing reports).

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Patients in Oak Ridge whose birthdate is in September														
2															
3	First	Last	Preferred	Date of Birth	Purchase Date	Address1	Address2	City	State	Zip	Area Code	Phone	Do Not Mail	Do Not Call	HIPAA Waiver Signed
4	Janet	Linde	Jan	1934-09-05	2003-06-02	345 Main Street		Stockton	CA	94568	415	555-1475			
5	Simon	Bernstein	Simon	1932-09-07	2003-03-26	2 Ashton Way		San Francisco	CA	94123	415	245-6745			
6	George	Smith		1934-09-01	2003-04-15	2 Round Street		Auburn	MA	01501	508	555-1234			
7	Anna	Woodworth		1915-09-05	2003-10-02	411 Valley Road		Sumner	ME	04292	207	358-2323			X

26. DOWNLOAD: Allows you to download the specific **Marketing Report** directly into an **Excel Document** onto your desktop, which you can take to your local mail fulfillment house.

Cycle Overview (6) – Reports (cont.)

27

Weekly Appointments Report

Weekly Appointments Report for Week of:

28

Appointments for Oak Ridge									<input type="button" value="DOWNLOAD"/>
Appointments	Sun Nov 16th	Mon Nov 17th	Tue Nov 18th	Wed Nov 19th	Thu Nov 20th	Fri Nov 21st	Sat Nov 22nd	Total	%
Speech-Language Eval	0	0	0	0	0	0	1	1	2%
Speech Language Therapy	0	0	0	0	0	0	0	0	0%
Sign-Language	0	0	0	0	0	0	0	0	0%
Repair	0	0	1	1	0	0	1	3	5%
Hearing Exam	1	7	9	9	12	0	0	38	61%
HAO	0	1	0	0	0	0	0	1	2%
Fluency Master	0	0	1	0	0	0	0	1	2%
Fitting	0	0	1	3	2	1	1	8	13%
ENG	0	0	0	0	0	0	0	0	0%
Clean n Check > 3 yrs	0	0	0	6	0	1	0	7	11%
check aid-non Programmabl	0	0	0	0	0	0	0	0	0%
check aid	0	0	0	0	0	0	0	0	0%
Best Hearing Aid Exam	0	1	0	0	1	1	0	3	5%
Total	1	9	12	19	15	3	3	62	100%

21. **APPOINTMENTS REPORT:** Provides the user with a detailed account of the weeks appointments: both as a total count and as a percentage. The **Appoinments Report allows you to move forward a week at a time** to identify specific appointments and project the number of sales opportunities.
22. **DOWNLOAD:** Downloads the Weekly Appointments Report into an Excel document onto your desktop,



Cycle Overview (7) – Practice/Appointment Flow – “The life of an appointment”

Cycle is designed to work the way you do; an appointment is made, a patient is seen and notes/next steps are recorded. Your work is finished. From here Cycle takes over. If a patient made a purchase, a receipt will be generated and a thank you letter printed and sent. The inventory will automatically populate with the purchase just completed, and the sale is automatically added to all reports.

The Cycle Appointment Flow:

Make Appointment > Confirm Appointment > Have Appointment > Update Patient Record.

Step 1 Make Appointment: An appointment is made. An orange triangle with the letter “N” for “not confirmed” appears next to the patient’s name.

Step 2 Confirm Appointment: The day before, the receptionist clicks on the Call List and confirms patient appointments by telephone. As patients confirm, the receptionist clicks the “confirmed” button next to their name in the **Call List**. This changes the orange triangle with the letter “N” to a green triangle with the letter “C” for “confirmed”. Color coding allows for a quick scan of the day to check for any unconfirmed appointments. **Note:** Appointments can also be confirmed by clicking on the patient’s name directly on the schedule. This will activate an Appointment Summary pop-up window that includes a no show button, cancel/reschedule button and “confirm appointment” button. Simply click on the button to confirm the appointment.

Date: Thursday, January 30, 2003 [save](#) [print call list](#) [print outcome forms](#)

confirmed

Patient: Janet DeLuca (Janet) [view](#)
Phone Number: (401) 278-8888 (home)
Message: Your appointment is on Thursday, January 30 at 09:00 am with Mr. James Mitchell at Oak Ridge for a Fitting.

Patient: Mrs. Edith Reed (Edith) [view](#)
Phone Number: (415) 333-5656 (home)
Message: Your appointment is on Thursday, January 30 at 12:30 pm with Mr. James Mitchell at Oak Ridge for a Hearing Exam.

not confirmed

Patient: Mrs. Christine Ridge (Christine) Not Confirmed
Phone Number: (510) 444-3434 (home) Confirmed
Message: Your appointment is on Thursday, January 30 at 10:30 am with Mr. James Mitchell at Oak Ridge for a Clean n Check > 3 yrs. Reschedule
 Cancel / Remove

Patient: Mr. Jack Feldman Not Confirmed
Phone Number: (415) 388-4949 (home) Confirmed
Message: Your appointment is on Thursday, January 30 at 01:30 pm with Ms. Christy Smith at Oak Ridge for a Clean n Check > 3 yrs. Reschedule
 Cancel / Remove

Patient: Mr. John Adamson (John) Not Confirmed
Phone Number: (222) 555-1212 (home) Confirmed
Message: Your appointment is on Thursday, January 30 at 09:00 am with Dr. James Mitchell at Oak Ridge for a Clean n Check > 3 yrs. Reschedule
 Cancel / Remove

no shows

Thursday, January 30 call list	
Call List	Qty.
Confirmed	2
Not Confirmed	3
No Show	2
Reschedule	5
Fitting	6
Repair Pickup	0
Show all...	

Step 3 The Appointment: A patient visits. The results of the appointment are noted in the patient’s file.

Sycle Overview (7) – Practice/Appointment Flow (cont.) – “The life of an appointment”

Step 4 Update Patient Record: The provider returns the file to the receptionist. The receptionist clicks on the patient’s name followed by a click on the “enter outcome” button in the Appointment Summary pop-up window. The receptionist can now update the patient’s file, including any purchases, mailings they should receive, level of hearing loss, etc. Entering the outcome automatically “completes” the appointment and changes the green triangle with the “C” to a blue triangle with a check mark, indicating that the appointment has been completed.

Appointment Outcome

Patient: Ken Dryden	Date: 06/18/03
Preferred Name:	Time: 10:30 am
Clinic: Oak Ridge	Length: 90 minutes
Provider: Christy Smith	Status: Not Confirmed
Type: Fitting	Preferred Lang: English
Referral Source: Current Patient	Age: 59
Mailing Code:	
Referral Name:	

Notes:

Left Ear Hearing Loss	Right Ear Hearing Loss
Level: 1 2 3 4 5 6	1 2 3 4 5 6
Type: <input type="checkbox"/> Sensoneural	<input type="checkbox"/> Sensoneural
<input type="checkbox"/> Conductive	<input type="checkbox"/> Conductive
<input type="checkbox"/> Mixed	<input type="checkbox"/> Mixed
Test Price: \$	\$

Outcome Notes:

Tinnitus:

Medical Referral:

Repair Left Hearing Aid:

Repair Right Hearing Aid:

Mail Status: Don't Send Mail

Birthday Card Confirmation Letter Thank You Letter Test No Sale

Clean and Check

Purchases Batteries Accessories/ALD Extended Service Plans

(Partial view)

Optional: Sycle features built-in outcome forms, which can be printed before a patient appointment and given to the provider.

A. The outcome form contains a patient identity, including preferred name, age, address, etc., along with a brief description of the patient’s last few visits, notes about this appointment and an area for the provider to fill in information.

B. From the Call List, the receptionist can print outcome forms for all patients scheduled for a particular day. Outcome forms can be printed individually by clicking directly on the patient’s name on the schedule, then clicking on the “print outcome forms” button in the resulting pop-up.

C. During the appointment, the provider can make note directly on the outcome form; these might include level of hearing loss, general notes and any purchases.

Cycle Overview (8) - How to Make an Appointment

There are several ways to make an appointment; we will explain the most commonly used method. If you would like to review other ways to make an appointment, please see Appendix A.

Selecting the Date and Time

Step 1: Choose the appointment date by clicking on the calendar (the appointment schedule will reload).

Step 2: Click on the starting time of the appointment. This will activate a search pop-up.

Step 3: Simply type the first few letters of the patient's first or last name into the search box and click on the search button. A **search results page will load** with a short list of possible matches.

Cycle Overview (8) – How to Make an Appointment (cont.)

Step 4: Select your patient from the list or you can click on the “add a new patient” link located next to the “search all clinics” button. For this example we will use Janet Jones, clicking on her name takes you directly to the New Appointment page.

search close

jan [Add a new patient](#) [archive search](#)

Search Result - Oak Ridge, Active Patients

showing results 1-9 of 9 for 'jan'

Patient Name	Phone Number	Left Battery	Right Battery
Jan Brown	(555) 555-6666 (home)	●	
Janet DeLuca	(401) 278-8888 (home)	●	●
Jane Doe	(415) 421-5555 (home)	●	●
jane happy	(954) 721-5566 (home)	●	
Janet Jones STEP 4	(412) 123-1236 (home)	●	
Janis Joplin	(543) 232-7643 (home)		
Janet Linde	(415) 555-1475 (home)		●
Jane Noe	(510) 888-8989 (home)		
Jane Seymore	(415) 244-6789 (home)	●	●

STEP 5: New Appointment. You can now:

- Select the type of appointment.
- Change the length of time for an appointment
- Select the referral source.
- Select a Referral Subcategory.
- You can give the advertising piece a brief description.
- Enter notes pertinent to today's appointment
- If you have selected physician referral, (from referral source c.), a small pop-up box will load. Find or add the physician's name.
- Press continue to advance to patient confirmation.

New Appointment

STEP 5

Patient: Janet . Jones

identity

Address: 13 Grant Ave.
San Francisco, CA 94132

Patient Type: Current
Phone Number: (412) 123-1236 (home)
E-mail Address:

appointment

Clinic: Oak Ridge **a**
Provider: Christy Smith

Type: Hearing Exam **c**
Referral Source: Newspaper **d**
Referral Subcategory: San Jose Mecury News **e**
Description: Summer Special

Date: 06/20/03 **b**
Time: 10:30 am
Length: 60 minutes
Status: Not Confirmed

Notes: recent ringing in ear **f**

Medical Referral

Dr. Grant Evans, M.D.

title:

first name:

last name:

suffix:

g

h

Sycle Overview (8) - How to Make an Appointment (cont.)

Step 6: You can verify your information on the Appointment Confirmation Page. Once you click “save”, the schedule will reload with the appointment you just made.

Note: You have the option to send the patient a Confirmation Letter by simply clicking on the Confirmation Letter box. Note: a confirmation letter can be sent only if an appointment has been made 7 days from the scheduling date

Appointment Confirmation

STEP 6

Patient: Janet . Jones [save](#)

Identity	
Address: 13 Grant Ave. San Francisco, CA 94132	Patient Type: Current Phone Number: (412) 123-1236 (home) E-mail Address:
Appointment	Send Mailings
Your appointment is on Friday, June 20 at 10:30 am with Ms. Smith at the Oak Ridge for a Hearing Exam.	<input type="checkbox"/> Confirmation Letter <small>*Mail piece is currently not turned on.</small>
save	close

*Schedule page below showing appointment just scheduled for Janet Jones.

Sample
[Help](#) | [Sign Out](#) | [Contact Us](#) | [Feedback](#)

appointments reports marketing administration

 PATIENT SEARCH
 enter patient /GO/

June 20, 2003

show clinic:
 show provider:
 find appointment type:
 length: min [find next](#)

	Landon Binstock	James Mitchell	Christy Smith
8:00 am			
8:15 am			
8:30 am			
8:45 am			
9:00 am			
9:15 am			
9:30 am			
9:45 am			
10:00 am			
10:15 am			
10:30 am			
10:45 am			Janet Jones Hearing Exam
11:00 am			
11:15 am			
11:30 am			

Printable Schedule:
 [print...](#)

[search](#)
[Add a new patient](#)

Sycle Overview (9) - How to “Squeeze” an Appointment

Appointment “Squeeze”: The appointment squeeze feature is designed to give the receptionist greater scheduling flexibility.

To squeeze an appointment, click on the small light blue boxes located to the right of an existing appointment. An existing appointment can be shortened from any length down to 15 minutes. Clicking on the small light blue boxes to the right of the grey appointment box will initiate the new appointment beginning at the selected time and shorten the existing appointment.

In the example below, Christin Ridge has a 30-minute Clean and Check appointment scheduled to begin at 10:15. Christin’s appointment has been squeezed into Janet DeLuca’s Fitting appointment. Janet’s appointment shortens by 15 minutes (from 90 to 75 minutes) to accommodate Christin’s appointment.

January 30, 2003

show clinic: show provider: find appointment type: length: min

<< Jan 2003 go >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	-27-	28	29	30	31	

Printable Schedule:

[Add a new patient](#)

Scroll	James Mitchell	Christy Smith
9:00 am	Janet DeLuca Fitting	
9:15 am		
9:30 am		
9:45 am		Jack Feldman Clean n Check
10:00 am		
10:15 am		
10:30 am	Christin Ridge Clean n Check	Janet Jones Hearing Exam
10:45 am		
11:00 am		
11:15 am	Leo Berns Hearing Exam	Gertrude Bendel Hearing Exam
11:30 am		
11:45 am		
12:00 pm		
12:15 pm		

1

Cycle Overview (10) - How to Block the Schedule

SCHEDULE BLOCK: Is used to block time on the appointment schedule for Provider appointments outside the clinic such as dentist appointments, doctors appointments, etc.

Step 1: To block time for a provider, click on the day and time on the appointment schedule. Click on the "Schedule Block" link located on the search pop-up

Step 2: On the **Schedule Block** pop-up you can fill in the **length of time** to be blocked from the schedule and a description of the appointment. Click save.

Schedule Block

Step 3: The appointment schedule will reload reflecting the time blocked from the schedule.

June 26, 2003

show clinic: show provider: find appointment type: length: min

							▼ Scroll ▲	Landon Binstock	James Mitchell	Christy Smith
9:00 am								Dentist Appointment		
9:15 am										
9:30 am										
9:45 am										
10:00 am							Joe 10 Speech Therapy			
10:15 am										
10:30 am										
10:45 am										
11:00 am										
11:15 am										
11:30 am							Quincy Adams Hearing Exam			
11:45 am										
12:00 pm										

Printable Schedule:

[Add a new patient](#)

Cycle Overview (11) - How to Move an Appointment

Step 1: Select the appointment you wish to move by clicking on the patient's name on the schedule (i.e.: Jack Feldman). This will load the Appointment Summary pop-up window.

The screenshot shows the Cycle.net interface. At the top, there's a navigation bar with links for Help, Sign Out, Contact Us, and Feedback. Below that, there are tabs for appointments, reports, marketing, and administration. A search bar is visible with the text "enter patient" and a "/GO/" button. The main content area displays a schedule for June 20, 2003. The schedule is organized by time slots (from 8:00 am to 12:15 pm) and providers (Sandy Fisichella, James Mitchell, Christy Smith). An appointment for Jack Feldman is scheduled for 10:30 am with Sandy Fisichella. A red box labeled "STEP 1" highlights this appointment. Other appointments include Gertrude Bendel (Best Hearing Aid Exam) at 10:45 am and Lollie Talvert (Hearing Exam) at 11:30 am. A calendar on the left shows the current date as June 20, 2003. There are also buttons for "Week at a glance" and "Today".

Step 2: From the Appointment Summary window, click on the “cancel/reschedule” button. A small pop-up window will load asking if you would like to cancel or reschedule the appointment, select one. .

Appointment Summary

Patient: **Jack Feldman** (415) 388-4949
Time Since Last Purchase: 60 days

The screenshot shows the Appointment Summary window for Jack Feldman. The appointment details are as follows:

appointment	confirm appointment no show edit
Clinic: Oak Ridge	Date: 06/20/03
Provider: Sandy Fisichella	Time: 10:30 am
Type: Fitting	Length: 90 minutes
Referral Source: Follow-up	Status: Not Confirmed
Referral Subcategory:	
Referral Name:	
Notes:	
print intake form enter intake print outcome form enter outcome	cancel / reschedule
	close

A red box labeled "STEP 2" highlights the "cancel / reschedule" button. A small pop-up window is visible in the top right corner, asking "What would you like to do with this appointment?" with buttons for "cancel and reschedule", "dont cancel", and "cancel".

Cycle Overview (11) - How to Move an Appointment (cont.)

Step 3: To reschedule, click on the “**reschedule**” button, located in the lower left corner. To cancel, click on the “**cancel appointment**” button in the lower right corner.

Appointment Summary

Patient: **Jack Feldman** (415) 388-4949
Time Since Last Purchase: 60 days

appointment	
Clinic: Oak Ridge	Date: 06/20/03
Provider: Sandy Fischella	Time: 10:30 am
Type: Fitting	Length: 90 minutes
Referral Source: Follow-up	Status: Reschedule
Referral Subcategory:	
Referral Name:	
Note:	

reschedule **STEP 3** **STEP 3** cancel appointment close

Step 5: In the white space just above the appointment schedule you will receive a prompt: **Rescheduling appointment for Jack Feldman: Please select a date and time.** You can select a different provider from the provider pulldown, then select a new date and time. Or, if the patient would like to reschedule at a later date, simply click on the “**cancel**” button and the patient’s name will appear in the call list under the reschedule category.

cycle.net Help | Sign Out | Contact Us | Feedback Sample

appointments reports marketing administration PATIENT SEARCH enter patient /GO/

show clinic: Oak Ridge show provider: Sandy Fischella find appointment type: Fitting length: 90 min find next

June 20, 2003

Rescheduling appointment for Jack Feldman: Please select a date and time

cancel

STEP 5

Scroll

Time	Provider
8:00 am	Sandy Fischella
8:15 am	
8:30 am	
8:45 am	
9:00 am	
9:15 am	
9:30 am	
9:45 am	
10:00 am	
10:15 am	
10:30 am	

Printable Schedule: All Providers print...

enter patient search Add a new patient

Cycle Overview (12) - How to Make a Purchase

How to Make a Purchase: There are basically two ways to make a purchase, **A1: Appointment Outcome** or **A2: Quick Purchase**.

A1: Appointment Outcome: Most Hearing Aid sales will take place as a result of a diagnostic appointment. As an appointment record is updated, there is an opportunity to add purchases made during the visit.

Step 1: From the Appointment Page, click on the patient's name (we will use Blaine Fuller) to reach the **Appointment Summary**.

July 17, 2003

show clinic: Oak Ridge show provider: All Providers find appointment type: --Select One-- length: 0 min find next

Printable Schedule: All Providers print...

enter patient search Add a new patient

Scroll	Landon Binstock	James Mitchell	Christy Smith
9:00 am	Joyce Carol Hearing Exam	Ned Divine Hearing Exam	
9:15 am			A1
9:30 am			
9:45 am			
10:00 am		Leo Berns Clean n Check	Blaine Fuller Hearing Exam
10:15 am	Christin Ridge		STEP 1
10:30 am			
10:45 am			
11:00 am			
11:15 am			
11:30 am			
11:45 am			
12:00 pm			

Step 2: Locate the “enter outcome” button and click on it to load the **Appointment Outcome** page.

Appointment Summary

Patient: **Blaine Fuller (510) 466-3454**
Time Since Last Purchase: no purchases found

appointment confirm appointment no show edit

Clinic: Oak Ridge Date: 07/17/03
Provider: Christy Smith Time: 10:00 am
Type: Hearing Exam Length: 60 minutes
Referral Source: Direct Mailing Status: Not Confirmed
Advertising Desc.: 4th of July Spe
Referral Name:
Notes:

print intake form enter intake print outcome form enter outcome cancel / reschedule close

STEP 2

Sycle Overview (12) - How to Make a Purchase (cont.)

Step 3: The **Appointment Outcome** page allows you to **record hearing loss**, add notes, check the appropriate mailing lists, **make or add purchases** and view previous receipts and previous appointments. As you scroll down the Appointment Outcome page, you will see the **“Yes”** button selected, this is located underneath the purchases sub-heading. (“Yes” is the default setting). Click the **“save”** button on the Appointment Outcome page to load the **Purchase Page**.

Appointment Outcome

Patient: **Blaine Fuller**
 Preferred Name:
 Preferred Language:
 Age: **76**

appointment

Clinic:	Oak Ridge	Date:	07/17/03
Provider:	Christy Smith	Time:	11:00 am
Type:	Hearing Exam	Length:	60 minutes
Referral Source:	Direct Mailing	Status:	Completed
Referral Subcategory:	N/A		
Description:	4th of July Special		

Notes:

Left Ear Hearing Loss

Level: Level 4 - Severe
 Type: Sensorineural

Right Ear Hearing Loss

Level: Level 4 - Severe
 Type: Sensorineural

Outcome Notes:

Tinnitus:

Medical Referral:

privacy

HIPAA Waiver Signed:
 OK to Send Mail:
 OK to Call:

purchases

Time since last hearing aid purchase: no purchases found

Were there any purchases with this appointment? (including hearing tests)



STEP 3

previous receipts

Date	Total	Amount Due
------	-------	------------

previous appointments

2002-10-30 Repair

Save

close

Cycle Overview (12) - How to Make a Purchase (cont.)

Step 4: On the Purchase Page, you have the opportunity to enter a tracking number and **change the purchase date**, the default setting is “today’s date”.

Hearing Aid purchases are organized in vertical columns for the left and right ears, respectively. Initiate the Purchase by going to the Manufacturer pulldown and selecting the manufacturer.

Note: You can click on the “Binaural” button (same as left button) located next to the Right Ear Manufacturer pulldown to auto populate the Right Ear Equipment fields with the same information that you just entered for the Left Ear.

Completing the Purchase Page you have the option to enter: Insurance estimates, Diagnostic services, Batteries, Extended Warranties and Accessories.

Purchase

Appointment: Thursday, July 17 at 11:00

Patient: Blaine Fuller

Staff: Christy Smith

Tracking #:

Purchase Date: 07 17 2003

Save

STEP 4

hearing aids

Left Ear

Manufacturer: SebotTek

Type: PAC

Model: PAC

Technology Lvl: Digital

Battery Type: 10A

Purchase

Base Price: \$ 3000

Discount: \$200 Trade in

Discount Amount: \$ 200.00

Purchase Price: \$ 2800.00

Sales Tax: yes

Manufacturer Warranty: 2 years

Right Ear same as left

Manufacturer: SebotTek

Type: PAC

Model: PAC

Technology Lvl: Digital

Battery Type: 10A

Purchase

Base Price: \$ 3000

Discount: \$200 Trade in

Discount Amount: \$ 200.00

Purchase Price: \$ 2800.00

Sales Tax: yes

Manufacturer Warranty: 2 years

(Partial View of Purchase Page)

diagnostic services

Service: Hearing Test

Price: \$ 55

Discount: Initial Visit Discount

Discount Amount: \$ 5.50

Purchase Price: \$ 49.50

Sales Tax: yes

Service: --Select One--

Price: \$

Discount: --Select One--

Discount Amount: \$

Purchase Price: \$

Sales Tax: yes

batteries

Cycle Overview (12) - How to Make a Purchase (cont.)

Step 4 (cont): Click on the save button at the bottom of the Purchase Page and the Receipt will load showing your purchases.

warranties and extended service plans

Left Ear Plan: <input type="text" value="Extended"/>	Right Ear Plan: <input type="text" value="Extended"/>
Price: \$ <input type="text" value="45.00"/>	Price: \$ <input type="text" value="45.00"/>
Discount: <input type="text" value="--Select One--"/>	Discount: <input type="text" value="--Select One--"/>
Discount Amount: \$ <input type="text"/>	Discount Amount: \$ <input type="text"/>
Purchase Price: \$ <input type="text" value="45.00"/>	Purchase Price: \$ <input type="text" value="45.00"/>
Sales Tax: <input type="checkbox"/> yes	Sales Tax: <input type="checkbox"/> yes

accessories/ALDs

Accessory: <input type="text" value="Swim Molds"/>
Description: <input type="text"/>
Price: \$ <input type="text" value="86.00"/>
Discount: <input type="text" value="--Select One--"/>
Discount Amount: \$ <input type="text"/>
Purchase Price: \$ <input type="text" value="86.00"/>
Sales Tax: <input type="checkbox"/> yes

Accessory: <input type="text" value="--Select One--"/>
Description: <input type="text"/>
Price: \$ <input type="text"/>
Discount: <input type="text" value="--Select One--"/>
Discount Amount: \$ <input type="text"/>
Purchase Price: \$ <input type="text"/>
Sales Tax: <input type="checkbox"/> yes

STEP 4

Step 5: The Receipt Page allows you to review your purchases; to **add** a purchase you can click on the “**add**” button, to **delete** a single item or the entire receipt click on the “**edit**” button.

Receipt

Patient: Blaine Fuller
456 Conneticut
San Francisco, CA 94578
(510) 466-3454

Oak Ridge
 Oak Ridge Hearing Clinic
 435 Second Ave.
 Oak Ridge, OH 45631
 (740) 446-7619
 (800) 223-1234

Provider: **Christy Smith**
Date: **07/17/2003**
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Accessory	Accessory: Swim Molds	\$86.00	\$86.00
1	Battery	Battery: Rayovac Pro-Line 10A		
1	Left Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Right Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Hearing Test	Hearing Test Discount: \$5.50 (Initial Visit Discount)	\$55.00	\$49.50
1	Warranty	Right Extended Service Plan: Extended	\$45.00	\$45.00
1	Warranty	Left Extended Service Plan: Extended	\$45.00	\$45.00
Total				\$5825.50
Sales Tax				\$0.00
Grand Total				\$5825.50
Amount Due				\$5825.50

STEP 5

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

Cycle Overview (12) - How to Make a Purchase (cont.)

Step 6: Click the payment button on the purchase Receipt. The payment window allows you to select the date, select the type of payment and the amount. Click on save and the purchase Receipt reloads showing your payment and the adjusted balance due.

Amount Due: \$5825.50

STEP 6

Date	Type	Amount	Description
Add new payment here:			
11 / 23 / 2003	Check	\$2500 total amt	
<input type="button" value="save"/>			<input type="button" value="close"/>

Receipt

STEP 7

Oak Ridge
 Oak Ridge Hearing Clinic
 435 Second Ave.
 Oak Ridge, OH 45631
 (740) 446-7619
 (800) 223-1234

Provider: Christy Smith
Date: 07/17/2003
Tracking #:

Patient: Blaine Fuller
 456 Connecticut
 San Francisco, CA 94578
 (510) 466-3454

Quantity	Item	Description	Cost	Amount
1	Accessory	Accessory: Swim Molds	\$86.00	\$86.00
1	Battery	Battery: Rayovac Pro-Line 10A		
1	Left Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Right Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Hearing Test	Hearing Test Discount: \$5.50 (Initial Visit Discount)	\$55.00	\$49.50
1	Warranty	Right Extended Service Plan: Extended	\$45.00	\$45.00
1	Warranty	Left Extended Service Plan: Extended	\$45.00	\$45.00
	Payment	Check 11/23/2003		\$2,500.00
Total				\$5825.50
Sales Tax				\$0.00
Grand Total				\$5825.50
Amount Due				\$3325.50

other receipts for this patient

Date	Total	Amount Due
<div style="border: 1px solid black; padding: 5px; display: inline-block; color: red; font-weight: bold;">STEP 7</div>		

Step 7: All printable receipts are embedded with your clinic logo. (The Sycle.net header does not print on the Receipt page). Print the Receipt with your clinic logo, hand to the patient and close receipt.

Cycle Overview (12) - How to Make a Purchase

A2: Quick Purchase: Is used primarily for walk-in patients that would like to purchase batteries, an extended warranty or an accessory.

Step 1: Matilda Brown walks into the clinic to purchase batteries. Enter the first few letters of Matilda's name in the search box on the appointment schedule page to load the search results. **Click on the "purchase" link located to the right of Matilda's name.** (If you accidentally click on Matilda's name, the Patient Summary page will load where you can easily click on the "purchase" button and proceed by following the steps outlined here.)

Results For: Matil

search results (1) close

Patient Name	Phone Number	Preferred Name	L	R	Action
Matilda Brown	(415) 777-8978(home)				appt purchase repair

search STEP 1 close

Matil [Add a new patient](#)

Step 2: When making a Quick Purchase **you must select a Staff member.** If you are purchasing a Hearing Aid, you will see the date of the most recent appointment and asked to "add hearing aid purchase to this appointment" if there was no previous appointment, the user will see a "create a new appointment" button. Simply scroll down the page to purchase batteries. Clicking the "save" button at the bottom of the page will load the Receipt Page.

Purchase

Patient: Matilda Brown

Staff:

Tracking #:

Purchase Date: 2003 Save

hearing aids

Hearing aid purchases need to be associated with an appointment, preferably their most recent appointment. If you would like to add a hearing aid purchase to this patient's most recent appointment please click here. Otherwise you will need to create a new appointment for this patient.

Most recent appointment : Fitting 2003-08-01 (Not Confirmed)

(Partial view of Purchase Page from Quick Purchase link)

batteries

Size: <input type="text" value="13 High Power"/>	STEP 2	Size: <input type="text" value="--Select One--"/>
Brand: <input type="text" value="Rayovac Proline 8 pack"/>		Brand: <input type="text" value="--Select One--"/>
Price per Item: <input type="text" value="14"/>		Price per Item: <input type="text"/>
Quantity: <input type="text" value="1"/>		Quantity: <input type="text"/>
Total Price: \$ <input type="text" value="14.00"/>		Total Price: \$ <input type="text" value="0.00"/>
Discount: <input type="text" value="--Select One--"/>		Discount: <input type="text" value="--Select One--"/>
Discount Amount: \$ <input type="text"/>		Discount Amount: \$ <input type="text"/>
Purchase Price: \$ <input type="text" value="14.00"/>		Purchase Price: \$ <input type="text"/>
Sales Tax: <input type="checkbox"/> yes		Sales Tax: <input type="checkbox"/> yes

Cycle Overview (13) - How to Make a Payment

Step 1: Enter the first few letters of the patient's name and the **search results** pop-up will load. Click on the patient's name to view the **Patient Summary**. (for this example, Blaine Fuller will make a payment).

Results For: blai

search results (1) close

Patient Name	Phone Number	Preferred Name	L	R	Action
Blaine Fuller	(510) 466-3454(home)				appt purchase repair

search close

blai [/GO/](#) [search all clinics](#) [Add a new patient](#)

Step 2: Scroll down the **Patient Summary** until you reach the **receipts** subcategory. **Click on the link located directly underneath the Date** (purchases will be listed in descending order by most recent date). For this example, click on **7/17/03** to load the **Receipt Page**.

Patient Summary

Patient: Blaine Fuller [HCFA](#) [purchase](#) [new appointment](#)

identity [quick edit](#) [edit full intake](#) [archive](#)

Full Name: Blaine Fuller, Preferred Name: Address: 456 Connecticut San Francisco, CA 94578 Snowbird Address:	Patient Type: Current Gender: Date of Birth: 01-17-1927 Age: 76 Preferred Language: Phone Number: (510) 466-3454 (home) Email Address:
--	---

equipment [return both](#) [exchange both](#) [edit](#)

return exchange repair Left Ear Equipment: SebotTek PAC Sensorineural Digital Serial Number: Purchase Date: 07-17-2003 Battery Type: 10A Purchase Purchase Price: \$ 2800.00 Warranty Exp: 07/16/05 Ext Service Plan: 07/11/06	return exchange repair Right Ear Equipment: SebotTek PAC Sensorineural Digital Serial Number: Purchase Date: 07-17-2003 Battery Type: 10A Purchase Purchase Price: \$ 2800.00 Warranty Exp: 07/16/05 Ext Service Plan: 07/11/06
--	---

receipts

Date	Total	Amount Due
07/17/2003	\$300.00	\$0.00
07/17/2003	\$5825.50	\$3325.50

STEP 2

Cycle Overview (13) - How to Make a Payment (cont.)

Step 3: Click on the “payment” button to enter a new payment.

Receipt

Patient: [Blaine Fuller](#)
 456 Conneticut
 San Francisco, CA 94578
 (510) 466-3454

Oak Ridge
 Oak Ridge Hearing Clinic
 435 Second Ave.
 Oak Ridge, OH 45631
 (740) 446-7619
 (800) 223-1234
Provider: Christy Smith
Date: 07/17/2003
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Accessory	Accessory: Swim Molds	\$86.00	\$86.00
1	Battery	Battery: Rayovac Pro-Line 10A		
1	Left Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Right Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Hearing Test	Hearing Test Discount: \$5.50 (Initial Visit Discount)	\$55.00	\$49.50
1	Warranty	Right Extended Service Plan: Extended	\$45.00	\$45.00
1	Warranty	Left Extended Service Plan: Extended	\$45.00	\$45.00
	Payment	Check 11/23/2003		\$2,500.00
Total				\$5825.50
Sales Tax				\$0.00
Grand Total				\$5825.50
Amount Due				\$3325.50

STEP 3

[payment](#) [fee](#)

[edit](#) [print](#) [close](#)

other receipts for this patient

Date	Total	Amount Due
------	-------	------------

Step 4: The **Payment** window allows the user to **change the date of a payment** (enter past payments or postdate a check). **Select payment type, enter the amount** and **click “save”**, to reload the Receipt showing your new payment.

Amount Due: \$3325.50

Date	Type	Amount	Description
11/23/2003	Check	\$2500.00	

STEP 4

Add new payment here:

11 25 2003 Cash \$3325.50 [total amt](#)

[save](#)

[close](#)

Cycle Overview (13) - How to Make a Payment (cont.)

Step 5: The Receipt loads showing the payment and balance due.

Receipt

Patient: Blaine Fuller
456 Conneticut
San Francisco, CA 94578
(510) 466-3454

Oak Ridge
Oak Ridge Hearing Clinic
435 Second Ave.
Oak Ridge, OH 45631
(740) 446-7619
(800) 223-1234

Provider: **Christy Smith**
Date: **07/17/2003**
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Accessory	Accessory: Swim Molds	\$86.00	\$86.00
1	Battery	Battery: Rayovac Pro-Line 10A		
1	Left Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Right Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Hearing Test	Hearing Test Discount: \$5.50 (Initial Visit Discount)	\$55.00	\$49.50
1	Warranty	Right Extended Service Plan: Extended	\$45.00	\$45.00
1	Warranty	Left Extended Service Plan: Extended	\$45.00	\$45.00
	Payment	Check 11/23/2003		\$2,500.00
	Payment	Cash 11/25/2003		\$3,325.50
Total				\$5825.50
Sales Tax				\$0.00
Grand Total				\$5825.50
Amount Due				\$0.00

[payment](#) [fee](#)

[edit](#) [print](#) [close](#)

Step 6: To delete a payment, click on the “**Payment**” link (underlined in blue) on the Receipt. The Payment pop-up window will load with a “**delete this payment**” link.

Step 7: Click on the “**delete this payment**” link. Once the payment has been deleted, you have the opportunity to add a new payment by clicking on the “**Add a new payment**” link.

Amount Due: \$0.00

Date	Type	Amount	Description
11/23/2003	Check	\$2500.00	
delete this payment			
<div style="display: flex; gap: 5px;"> <input type="text" value="11"/> <input type="text" value="25"/> <input type="text" value="2003"/> </div>	<input type="text" value="Cash"/>	<input style="width: 150px;" type="text" value="\$3325.50"/>	<input style="width: 150px;" type="text"/>
Add a new payment			
<input type="button" value="save"/>		<input type="button" value="close"/>	

STEP 7

Cycle Overview (14) - How to Make a Return/Exchange

Step 1: Enter the first few letters of the patient's name and the **search results** pop-up will load. Click on the patient's name to view the **Patient Summary**. (for this example, Blaine Fuller will return his hearing aid).

search close

blain search search all clinics [Add a new patient](#) [archive search](#)

Search Result - Oak Ridge, Active Patients

showing results 1-1 of 1 for 'blain'

Patient Name	Phone Number	L	R	Action
Blaine Fuller	(510) 466-3454 (home)	●	●	appt purchase repair

STEP 1

Step 2: Scroll down the Patient Summary until you reach the equipment subcategory. Click on the **“return both”** button to load the “return” pop-up.

Patient Summary

Patient: Blaine Fuller HCFA purchase new appointment

identity quick edit edit full intake archive

Full Name: Blaine Fuller,	Patient Type: Current
Preferred Name:	Gender:
Address: 456 Conneticut	Date of Birth: 01-17-1927
San Francisco, CA 94578	Age: 76
Snowbird Address:	Preferred Language:
	Phone Number: (510) 466-3454 (home)
	Email Address:

STEP 2

(Partial View)

equipment return both exchange both edit

return exchange repair	return exchange repair
Left Ear	Right Ear
Equipment: SebotTek PAC Sensorineural Digital	Equipment: SebotTek PAC Sensorineural Digital
Serial Number:	Serial Number:
Purchase Date: 07-17-2003	Purchase Date: 07-17-2003
Battery Type: 10A	Battery Type: 10A
Purchase	Purchase
Purchase Price: \$ 2800.00	Purchase Price: \$ 2800.00
Warranty Exp: 07/16/05	Warranty Exp: 07/16/05
Ext Service Plan: 07/11/06	Ext Service Plan: 07/11/06

OK to return these hearing aids?

- SebotTek PAC PAC Digital
- SebotTek PAC PAC Digital

STEP 3

Return Date:

ok close

Step 3: The **“return” pop-up** asks you to confirm the return and the return date. Simply click **“ok”**, and a second confirmation pop-up will load. Click **“ok”** once more and a **Credit Receipt** window will load showing your return.

Cycle Overview (14) - How to Make a Return/Exchange

Step 4: The credit Receipt shows the returned Hearing Aids listed directly underneath the original purchase. To make a credit payment click on the “credit” button.

Receipt

Patient: Blaine Fuller
456 Conneticut
San Francisco, CA 94578
(510) 466-3454

Oak Ridge
Oak Ridge Hearing Clinic
435 Second Ave.
Oak Ridge, OH 45631
(740) 446-7619
(800) 223-1234
Provider: Christy Smith
Date: 07/17/2003
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Accessory	Accessory: Swim Molds	\$86.00	\$86.00
1	Battery	Battery: Rayovac Pro-Line 10A		
1	Left Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Left Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in) Returned 2003-11-23		(\$2,800.00)
1	Right Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in)	\$3,000.00	\$2,800.00
1	Right Hearing Aid	SebotTek PAC PAC Digital Discount: \$200.00 (\$200 Trade in) Returned 2003-11-23		(\$2,800.00)
1	Hearing Test	Hearing Test Discount: \$5.50 (Initial Visit Discount)	\$55.00	\$49.50
1	Warranty	Right Extended Service Plan: Extended	\$45.00	\$45.00
1	Warranty	Left Extended Service Plan: Extended	\$45.00	\$45.00
	Payment	Check 11/23/2003		\$2,500.00
	Payment	Cash 11/25/2003		\$3,325.50
Total				\$225.50
Sales Tax				\$0.00
Grand Total				\$225.50
Amount Owed				(\$5600.00)

STEP 4

[credit](#) [fee](#) [edit](#) [print](#) [close](#)

other receipts for this patient

Step 5: You can change the date of the credit payment, select the type of credit payment and the amount.

Amount Owed: \$5600.00

Date	Type	Amount	Description
STEP 5			
Add new credit here:			
11	28	2003	Check
		\$5600.00	total amt
save			close

Cycle Overview (14) - How to Make a Return/Exchange (cont.)

Exchange:

Step 1: (follow Steps 1 and 2 for Hearing Aid Returns) From the Patient Summary select the “Exchange both” button.

Step 3: The “exchange” pop-up asks you to confirm the exchange. Click “ok” to load the Exchange page.

OK to exchange these hearing aids?

- Starkey Axent CIC Digital
- Starkey Axent CIC Digital

Return Date: 11 23 2003

Step 3: To complete the exchange, select the new hearing aid and purchase price (as you would when making a new purchase).

Exchange

Patient: **Scott Austin**
 Staff: James Mitchell
 Tracking #:
 Exchange Date: 11 23 2003
 Exchanging For: Starkey Axent CIC Digital (left) and Starkey Axent CIC Digital (right)

STEP 3

hearing aids

<p>Left Ear</p> <p>Manufacturer: Starkey</p> <p>Type: ITC</p> <p>Model: Arista</p> <p>Technology Lvl: Digital</p> <p>Battery Type: --Select One--</p> <p>Purchase</p> <p>Base Price: \$ 3200</p> <p>Discount: --Select One--</p> <p>Discount Amount: \$</p> <p>Purchase Price: \$ 3200.00</p> <p>Sales Tax: <input type="checkbox"/> yes</p> <p>Manufacturer Warranty: 2 years</p>	<p>Right Ear <input type="button" value="same as left"/></p> <p>Manufacturer: Starkey</p> <p>Type: ITC</p> <p>Model: Arista</p> <p>Technology Lvl: Digital</p> <p>Battery Type: --Select One--</p> <p>Purchase</p> <p>Base Price: \$ 3200</p> <p>Discount: --Select One--</p> <p>Discount Amount: \$</p> <p>Purchase Price: \$ 3200.00</p> <p>Sales Tax: <input type="checkbox"/> yes</p> <p>Manufacturer Warranty: 2 years</p>
--	---

Cycle Overview (14) - How to Make a Return/Exchange (cont.)

Step 4: The Receipt will show the exchange and the new amount due, as well as any negative or positive balance. You can click on the “fee” button to add a restocking fee. You can also click on the payment button to take a deposit for the Exchange Purchase.

Receipt

Patient: [Scott Austin](#)
(999) 999-9999

Oak Ridge
Oak Ridge Hearing Clinic
435 Second Ave.
Oak Ridge, OH 45631
(740) 446-7619
(800) 223-1234
Provider: James Mitchell
Date: 11/21/2003
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Right Hearing Aid	Starkey Arista ITC Digital Purchased 2003-11-23	\$3,200.00	\$3,200.00
1	Left Hearing Aid	Starkey Arista ITC Digital Purchased 2003-11-23	\$3,200.00	\$3,200.00
1	Right Hearing Aid	Starkey Axent CIC Digital Discount: \$100.00 (Cash)	\$5,000.00	\$4,900.00
1	Right Hearing Aid	Starkey Axent CIC Digital Discount: \$100.00 (Cash) Returned 2003-11-23		(\$4,900.00)
1	Left Hearing Aid	Starkey Axent CIC Digital Discount: \$100.00 (Cash)	\$5,000.00	\$4,900.00
1	Left Hearing Aid	Starkey Axent CIC Digital Discount: \$100.00 (Cash) Returned 2003-11-23		(\$4,900.00)
	Fee	Restocking Fee 11/23/2003		\$50.00
Total				\$6450.00
Sales Tax				\$0.00
Grand Total				\$6450.00
Amount Due				\$6450.00

STEP 4

STEP 5

[payment](#) [fee](#)

[edit](#) [print](#) [close](#)

Step 5: A \$50.00 restocking fee has been added to the Receipt.

Date	Type	Amount	Description
Add new fee here: <input type="text" value="11"/> <input type="text" value="23"/> 2003	<input type="text" value="Restocking Fee"/>	<input type="text" value="\$50"/>	<input type="text"/>

[save](#) [close](#)

STEP 5

Cycle Overview (15) - How to Make a Repair

Step 1: From the Appointment Schedule page, type the first few letters of the patient's first or last name and click on the **search** button. For this example we will use John Reed.

Printable Schedule:

All Providers

john

[Add a new patient](#)

10:00 am			
10:15 am			
10:30 am			
10:45 am			
11:00 am			
11:15 am			

STEP 1

Step 2: Locate John Reed's name on the **search results** page and click the **repair** link.

Results For: john reed

search results (18)

Patient Name	Phone Number	Preferred Name	L	R	Action
John Reed					appt purchase repair
John Adams	(555) 555-1212(work)	John	●	●	appt purchase repair
John Adamson	(222) 555-1212(home)	John	●	●	appt purchase repair
John Doe	(555) 555-5555(home)	john	●	●	appt purchase repair

STEP 2

Step 3: Select the Hearing Aid from the pulldown, enter a brief description of the repair, where the repair will be sent (optional) and an estimate for the work to be performed. Click the save button to load the **Receipt** window.

Repair

Patient: John Reed

Staff:

Tracking #:

Repair Date:

repairs

Hearing Aid:

Description / Notes:

Sent To:

Estimated Price:

Hearing Aid:

Description / Notes:

Sent To:

Estimated Price:

STEP 3

Cycle Overview (15) - How to Make a Repair (cont.)

Step 4: The **Receipt window reflects the repair and the estimated cost** of the repair. You can print a copy of this estimate to give to the patient. Click the “close” button to reload the Appointment schedule page.

Receipt

Patient: [John Reed](#)
32 Sierra Vista
Corte Madera, CA 95674
(415) 333-3453

Oak Ridge
Oak Ridge Hearing Clinic
435 Second Ave.
Oak Ridge, OH 45631
(740) 446-7619
(800) 223-1234
Provider: Christy Smith
Date: 11/23/2003
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Repair Estimate	Repair Left Hearing Aid: Phonak Aero 22 ITC Digital Door is Broken Estimated Price: \$95.00		
Total				\$0.00
Sales Tax				\$0.00
Grand Total				\$0.00
Amount Due				\$0.00

STEP 4

other receipts for this patient

HOW TO CHECK IN A REPAIR :

Step 5: To check-in a Hearing Aid once it has been repaired, click on the **Inventory Box** located on the lower left hand side of the Appointment schedule page. Scroll down the Inventory Box until you reach the **Repair Check-In** subcategory. When you have located your patient’s repair, check the “repaired” box, enter the serial number S/N, and the cost (optional). Click on the “**save**” button.

Note: Once a hearing aid has been checked-in your patient will automatically populate the **Call List**. You can find your patient’s name in the Repair Pickup subcategory. Their name will stay on the Call List as a reminder until the patient has been contacted or their name has been removed from the Call List.

Repair Check-In	
Patient: Mr. Amin Musani Equipment: Micro-Tech Other CIC Digital Description: Sending LE CIC into MTech for repair. Send Date: 11/20/2003 Sent To: MTech	<input type="checkbox"/> Repaired <input type="text" value="00007"/> S/N \$ <input type="text"/> Cost
Patient: Ned Divine Equipment: Beltone Invisa - Polara CIC Digital Description: beltone Send Date: 11/30/2003 Sent To: beltone	<input type="checkbox"/> Repaired <input type="text" value="7890"/> S/N \$ <input type="text"/> Cost
Patient: Mr. John Reed Equipment: Phonak Aero 22 ITC Digital Description: Door is Broken Send Date: 11/23/2003 Sent To: Phonak/West	<input checked="" type="checkbox"/> Repaired <input type="text" value="236-77"/> S/N \$ <input type="text" value="40"/> Cost

STEP 5

Cycle Overview (15) - How to Make a Repair (cont.)

Step 6: When John Reed arrives to collect his repaired hearing aid, locate his name in the **Inventory Box** under **Repairs to be Delivered to Patient**. Click on the **Deliver to Patient** link located on the right hand side of the page.

Repairs To Be Delivered To Patient	
Patient: Franky Avalon Equipment: Bernafon Flair ITC Digital Description: door broke Sent To: Send Date: 11/18/2003 Arrival Date: 11/23/2003	Deliver to Patient
Patient: Mrs. Oscar Fish Equipment: Widex Diva BTE Digital Description: Sent To: Send Date: 11/19/2003 Arrival Date: 11/23/2003	Deliver to Patient
Patient: Mr. John Reed Equipment: Phonak Aero 22 ITC Digital Description: Door is Broken Sent To: Phonak/West Send Date: 11/23/2003 Arrival Date: 11/24/2003	Deliver to Patient

STEP 6

Step 7: Enter the **final price** (You can change the final price by clicking in the **Final Price** field, highlighting the price and typing in a new price). You can enter notes in the **Repair Results** field, pulldown to set the **Warranty Expiration**, include an insurance estimate and and select sales tax if applicable. Click the “save” button to load the Receipt page.

Deliver Repaired Hearing Aid

Patient: John Reed

Deliver Hearing Aid

Estimated Price: \$95.00

Repair Results:

Warranty Exp:

Actual Cost: \$

Final Price: \$

Sales Tax: yes

insurance estimate

Insurance Company:

Est Benefit: \$

Notes:

STEP 7

Cycle Overview (15) - How to Make a Repair (cont.)

Step 8: The Purchase Receipt page shows the final price charged for the repair. You can take a payment, edit, print or close the receipt.

Receipt

Patient: [John Reed](#)
32 Sierra Vista
Corte Madera, CA 95674
(415) 333-3453

Oak Ridge
 Oak Ridge Hearing Clinic
 435 Second Ave.
 Oak Ridge, OH 45631
 (740) 446-7619
 (800) 223-1234

Provider: **Christy Smith**
Date: **11/23/2003**
Tracking #:

Quantity	Item	Description	Cost	Amount
1	Repair Estimate	Repair Left Hearing Aid: Phonak Aero 22 ITC Digital Door is Broken Estimated Price: \$95.00		
1	Repair	Repair: Phonak Aero 22 ITC Digital Door is Broken Purchased 2003-11-24		\$95.00
	Insurance	Estimated benefit from Blue Cross	\$40.00	
Total				\$95.00
Sales Tax				\$0.00
Grand Total				\$95.00
Amount Due				\$95.00

STEP 8

Step 9: A repair is treated like any other purchase. In our example, John Reed has made a payment of \$55.00, his insurance estimate is \$40.00.

Amount Due: \$95.00

Date	Type	Amount	Description
Add new payment here: <input type="text" value="11"/> <input type="text" value="24"/> <input type="text" value="2003"/>	<input type="text" value="Check"/>	<input type="text" value="\$55"/> <input type="text" value="total amt"/>	<input type="text"/>

STEP 10

Cycle Overview (16) - How to Perform a Global Search (Search All Clinics)

Global Search is a multi-clinic feature which allows you to search for a patient in more than one clinic, and to move a patient (patient record) from one clinic to another.

Step 1: Enter the first few letters of the patient's name and the **search results** page will load. (We will use Edward Smithson for this example)

show clinic: Oak Ridge show provider: All Providers find appointment type: --Select One-- length: 0 min [find next](#)

Jan 2003 go Scroll James Mitchell Christy Smith

9:00 am Janet DeLuca Fitting

9:15 am Fitting

9:30 am

9:45 am Martin Bowman Fitting

10:00 am

10:15 am

10:30 am Christin Ridge Clean n Check

10:45 am

11:00 am

11:15 am Leo Berns Hearing Exam

11:30 am

11:45 am

12:00 pm

Printable Schedule: All Providers [print...](#)

smi [search](#) [Add a new patient](#)

STEP 1

Step 2: Click on “**search all clinics**”. Edward Smithson is not in our search results for the Oak Ridge Clinic. We are sure he is a patient at one of our other clinics.

search [close](#)

smi [search](#) [search all clinics](#) [Add a new patient](#) [archive search](#)

STEP 2

Search Result - Oak Ridge, A

showing results 1-27 of 27 for 'smi'

Patient Name	Phone Number	L	R	Action
Adelle M Smith	(1) 200-0003 (home)	●	●	appt purchase repair
Agnes T Smith	(415) 553-3216 (home)	●	●	appt purchase repair
Angnes Smith	(415) 555-1212 (home)	●		appt purchase repair
Anne Smith	(415) 455-5555 (home)			appt purchase repair
Beth Smith		●	●	appt purchase repair
Bill Smith		●	●	appt purchase repair
Frank Smith	(415) 505-1214 (home)	●		appt purchase repair
Frank Smith		●	●	appt purchase repair
George Smith	(508) 555-1234 (home)	●	●	appt purchase repair

Cycle Overview (16) - How to Perform a Global Search (cont.)

Step 3: The search results for all clinics show Edward Smithson as a patient at Shady Oakes clinic. We can click on the patient's name to review or edit the **Patient Summary** or click on the **"change clinic"** link to move the patient to another clinic.

Results For: smi

search results (16) close

Patient Name	Phone Number	Preferred Name	Clinic	Action
Agnes Smith	(415) 555-1234(home)	Mr. Smith	Maple View	Change Clinic
Agnes T Smith	(415) 553-3216(home)	Aggie	Oak Ridge	Change Clinic
Alan Smith	(503) 122-1234(home)		Maple View	Change Clinic
Bill Smith	(0) 0-0(home)		Oak Ridge	Change Clinic
Bob Smith	(503) 572-6391(home)		Maple View	Change Clinic
Frank Smith	(415) 505-1214(home)		Oak Ridge	Change Clinic
Frank Smith	(0) 0-0(home)		Oak Ridge	Change Clinic
joe smith	(0) 0-0(home)		Maple View	Change Clinic
John Smith	(415) 555-1212(home)	Mr. Smith	Oak Ridge	Change Clinic
John Smith	(503) 0-0(home)		Oak Ridge	Change Clinic
Mary Smith	(401) 822-1222(home)		Oak Ridge	Change Clinic
Mary Smith	(401) 555-5555(home)		Maple View	Change Clinic
Sara Smith	(0) 0-0(home)		Oak Ridge	Change Clinic
TOM SMITH	(0) 0-0(home)		Oak Ridge	Change Clinic
John Smithers	(0) 0-0(home)		Oak Ridge	Change Clinic
Edward Smithson	(310) 334-1212(home)		Shady Oakes	Change Clinic

STEP 3

Step 4: Using the **clinic pulldown**, you can select the new clinic for your patient.

cycle.net

Sample
[Help](#) | [Contact Us](#) | [Feedback](#)
[print](#) [close](#)

Patient: Edward Smithson
 Current Clinic: Shady Oakes

Please select the clinic you would like to move Edward Smithson to: close

STEP 4

Step 5: The **confirmation pop-up** lets you know that Edward Smithson has been moved to the Oak Ridge Clinic.

Patient: Edward Smithson
 Current Clinic: Oak Ridge

STEP 5

Edward Smithson has been moved from **Shady Oakes** to **Oak Ridge**
close

Sycle Overview (17) – Patient Summary

The **Patient Summary** provides a detailed history of the patient's appointments and purchases. You can also initiate a purchase, edit the patient intake form, archive, schedule a new appointment or print a HCFA form for the patient.

Patient Summary

STEP 1
[HCFA](#)
[purchase](#)
[new appointment](#)

Patient: Myra C Wallace

identity [quick edit](#) [edit full intake](#) [archive](#)

<p>Full Name: Mrs. Myra C Wallace, Preferred Name: Address: 570 Pershing Kansas City, OH Snowbird Address:</p>	<p>Patient Type: Current Gender: Female Date of Birth: 05-10-1928 Age: 75 Preferred Language: English Phone Number: (316) 345-3490 (home) Email Address:</p>
--	---

privacy

HIPAA Waiver Signed: no
OK to Call: yes
OK to Mail: yes

responsible party

<p>Name: Address:</p>	<p>Relationship to Patient: Phone Number: E-mail Address: Bill to Responsible Party: no</p>
---	---

background

<p>Current Provider: James Mitchell Previous Provider: Prev. Provider Phone:</p>	<p>Primary Physician: Dr. Morris Hirsch Referring Physician: Dr. Morris Hirsch</p>
---	--

HCFA Form

Step 1: Click on the **HCFA** button to load a HCFA form. The HCFA form will populate with the patient information that was entered on the patient intake form. Complete the form electronically or after printing a copy for submission.

HCFA Form

save and view printable

Clinic: Oak Ridge **Staff:** James Mitchell

<p>1. MEDICARE MEDICAID CHAMPUS CHAMPWA GROUP HEALTH PLAN FECA BLK LUNG OTHER</p> <p style="text-align: center;"> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> </p>	<p>1a. INSURED'S I.D. NUMBER</p> <input style="width: 100%;" type="text"/>								
<p>2. PATIENT'S NAME</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">last Wallace</td> <td style="width: 33%;">first Myra</td> <td style="width: 33%;">middle inital C</td> </tr> </table>	last Wallace	first Myra	middle inital C	<p>3. PATIENT'S BIRTH DATE SEX</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">MM 05</td> <td style="width: 25%;">DD 10</td> <td style="width: 25%;">YY 28</td> <td style="width: 25%;">Male <input type="radio"/></td> <td style="width: 25%;">Female <input checked="" type="radio"/></td> </tr> </table>	MM 05	DD 10	YY 28	Male <input type="radio"/>	Female <input checked="" type="radio"/>
last Wallace	first Myra	middle inital C							
MM 05	DD 10	YY 28	Male <input type="radio"/>	Female <input checked="" type="radio"/>					
<p>4. INSURED'S NAME</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">last</td> <td style="width: 33%;">first</td> <td style="width: 33%;">middle inital</td> </tr> <tr> <td><input style="width: 100%;" type="text"/></td> <td><input style="width: 100%;" type="text"/></td> <td><input style="width: 100%;" type="text"/></td> </tr> </table>	last	first	middle inital	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<p>5. PATIENT'S ADDRESS (No., Street)</p> <input style="width: 100%;" type="text"/>		
last	first	middle inital							
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>							
<p>6. PATIENT'S RELATIONSHIP TO INSURED</p> <p>Self <input type="radio"/> Spouse <input type="radio"/> Child <input type="radio"/> Other <input type="radio"/></p>	<p>7. INSURED'S ADDRESS (No., Street)</p> <input style="width: 100%;" type="text"/>								
<p>8. PATIENT STATUS</p> <p>Single <input type="radio"/> Married <input type="radio"/> Other <input type="radio"/></p> <p>Employed <input type="radio"/> FT Student <input type="radio"/> PT Student <input type="radio"/> No Employment <input type="radio"/></p>	<p>9. INSURED'S ADDRESS (No., Street)</p> <input style="width: 100%;" type="text"/>								
<p>9. OTHER INSURED'S NAME</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">last</td> <td style="width: 33%;">first</td> <td style="width: 33%;">middle inital</td> </tr> <tr> <td><input style="width: 100%;" type="text"/></td> <td><input style="width: 100%;" type="text"/></td> <td><input style="width: 100%;" type="text"/></td> </tr> </table>	last	first	middle inital	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<p>10. IS PATIENT'S CONDITION RELATED TO:</p> <p>a. EMPLOYMENT? (CURRENT OR PREVIOUS)</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p> <p>b. AUTO ACCIDENT? PLACE (State)</p> <p><input type="radio"/> <input checked="" type="radio"/> <input type="text"/></p>		
last	first	middle inital							
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>							
<p>11. INSURED'S POLICY OR GROUP NUMBER</p> <input style="width: 100%;" type="text"/>	<p>11. INSURED'S POLICY OR FECA NUMBER</p> <input style="width: 100%;" type="text"/>								
<p>12. OTHER INSURED'S POLICY OR GROUP NUMBER</p> <input style="width: 100%;" type="text"/>	<p>12. INSURED'S DATE OF BIRTH SEX</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">MM <input style="width: 100%;" type="text"/></td> <td style="width: 25%;">DD <input style="width: 100%;" type="text"/></td> <td style="width: 25%;">YY <input style="width: 100%;" type="text"/></td> <td style="width: 25%;">Male <input type="radio"/></td> <td style="width: 25%;">Female <input type="radio"/></td> </tr> </table>	MM <input style="width: 100%;" type="text"/>	DD <input style="width: 100%;" type="text"/>	YY <input style="width: 100%;" type="text"/>	Male <input type="radio"/>	Female <input type="radio"/>			
MM <input style="width: 100%;" type="text"/>	DD <input style="width: 100%;" type="text"/>	YY <input style="width: 100%;" type="text"/>	Male <input type="radio"/>	Female <input type="radio"/>					

Sycle Overview (17) – Patient Summary (cont.)

Archive:

Step 2: To archive a patient click on the “**archive**” button. This will load a pop-up window which asks you to confirm your decision to archive the patient.

Patient Summary

Patient: Myra C Wallace

HCFA purchase new appointment

identity quick edit edit full intake archive

Full Name: Mrs. Myra C Wallace, Preferred Name: Address: 570 Pershing Kansas City, OH Snowbird Address:	Patient Type: Current Gender: Female Date of Birth: 05-10-1928 Age: 75 Preferred Language: English Phone Number: (316) 345-3490 (home) Email Address:
---	--

Are you sure you want to archive Myra Wallace?

OK Cancel

STEP 2

Step 3: The Patient Summary reloads with the opportunity to “unarchive” the patient. No patient record is ever deleted; you can at anytime pull up a patient record.

Patient Summary

Patient: Myra C Wallace

HCFA purchase new appointment

identity quick edit edit full intake unarchive

Full Name: Mrs. Myra C Wallace, Preferred Name: Address: 570 Pershing Kansas City, OH Snowbird Address:	Patient Type: Current Gender: Female Date of Birth: 05-10-1928 Age: 75 Preferred Language: English Phone Number: (316) 345-3490 (home) Email Address:
---	--

STEP 3

Step 4: Archive Search is located on the Search Results window. You can click on the “archive search” link to locate a patient and access their Patient Summary.

search close

myra search search all clinics Add a new patient archive search

STEP 4

Cycle Overview (17) – Patient Summary (cont.)

Edit the Patient Summary:

appointments							view all
Date	Type	Status	Outcome Notes	Ref Source	Purchases		
01/30/2003	Hearing Exam	Completed	...		Hearing Aids Hearing Aids Batteries		

hearing loss		edit
Left Ear: Level 4 - Severe	Right Ear: Level 4 - Severe	

equipment				return both	exchange both	edit
return	exchange	repair		return	exchange	repair
Left Ear		Right Ear				
Equipment: Siemens Signia Sensorineural Digital		Equipment: Siemens Signia Sensorineural Digital				
Serial Number:		Serial Number:				
Purchase Date: 01-30-2003		Purchase Date: 01-30-2003				
Battery Type: 10A		Battery Type: 10A				
Purchase		Purchase				
Purchase Price: \$ 2400.00		Purchase Price: \$ 2400.00				
Warranty Exp: 01/29/05		Warranty Exp: 01/29/05				

receipts		
Date	Total	Amount Due
01/30/2003	\$4925.00	\$2925.00

insurance		edit
Primary Insurance		Secondary Insurance
Policy Holder's Name: Myra Wallace		Policy Holder's Name:
Insurance Company: Blue Cross		Insurance Company:
Group:		Group:
ID Number: 345-54-0876		ID Number:
Insurance Co. Phone: 800-3245-98		Insurance Co. Phone:
Notes:		Notes:

mailings		edit
Mail Status: Send Mail		
Mailing Lists: Birthday Card, Confirmation Letter, Warranty Letter, Thank You Letter, Test No Sale, Repair Rebate Letter, Clean and Check Card		

STEP 5

Step 5: Most subcategories in the **Patient Summary** have an **edit button** located on the right hand side of the page. Below is an example of how to edit the level hearing loss.

hearing loss		print	close
Left Ear:	Right Ear: Level 4 - Severe	save	
save			close

- Level 1 - No Loss
- Level 2 - Mild
- Level 3 - Moderate
- Level 4 - Severe
- Level 5 - Profound
- Level 6 - Unaidable
- Did Not Test

Appendix A: Other Ways to Make an Appointment

Following are two other frequently used methods for making appointments, **Version 2: Patient Search** and **Version 3: Add a New Patient**.

Version 2: Patient Search

Step 1: Enter the first few letters of the patient's first or last name in the search box: (example: John Adamson) and click the "search" button.

The screenshot shows the Asycle.net patient search interface. At the top, there is a navigation bar with links for Help, Sign Out, Contact Us, and Feedback. Below this is a search bar with the text 'ada' and a '/GO/' button. The main content area displays a calendar for January 30, 2003, and a list of appointments for James Mitchell and Christy Smith. A red box labeled 'STEP 1' points to the search button.

Step 2: Click on the "appt" link located to the right of the patient name (John Adamson, Jr.) and the Appointment page will reload.

The screenshot shows the search results page. The search results are displayed in a table with the following columns: Patient Name, Phone Number, Preferred Name, L, R, and Action. The patient name 'John Adamson' is highlighted, and the 'appt' link is visible. A red box labeled 'STEP 2' points to the 'appt' link.

Patient Name	Phone Number	Preferred Name	L	R	Action
John Adamson	(222) 555-1212(home)	John	●	●	appt purchase repair

Appendix A: Other Ways to Make an Appointment (cont.)

Step 3: Just above the schedule you will see the prompt: **Scheduling appointment for John Adamson: Please select a date and time.** Click into the time slot on the schedule to initiate a new appointment.

show clinic: Oak Ridge show provider: All Providers find appointment type: --Select One-- length: 15 min [find next](#)

STEP 3 **Scheduling appointment for John Adamson: Please select a date and time**

cancel

▼ Scroll ▲	Sandy Fischella	James Mitchell	Christy Smith
8:00 am			
8:15 am			
8:30 am			
8:45 am			
9:00 am			
9:15 am			
9:30 am			Martin Bowman

Printable Schedule:

Step 4: Select the type of appointment, the referral source and enter any additional information in the notes box. Click “continue”.

New Appointment

Patient: John . Adamson [continue](#)

identity

Address: 345 Johnsway Rd Patient Type: Current
Felix, CA 98264 Phone Number: (222) 555-1212 (home)
E-mail Address:

appointment

Clinic: Oak Ridge Date: 01/30/03
Provider: James Mitchell Time: 9:00 am
Type: Clean n Check > 3 yrs Length: 30 minutes
Referral Source: Direct Mailing Status: Not Confirmed
Referral Subcategory: Free clean and check
Description:

STEP 4

Notes: 6 months since last visit

[continue](#) [close](#)

Step 5: Verify the information and click “save”, the schedule will reload with the appointment you just made.

Note: You have the option to send the patient a Confirmation Letter by simply clicking on the Confirmation Letter box. If you choose to send a Confirmation Letter, allow 7 days before the actual date of the appointment.

Appointment Confirmation

Patient: John . Adamson [save](#)

Identity

Address: 345 Johnsway Rd Patient Type: Current
Felix, CA 98264 Phone Number: (222) 555-1212 (home)
E-mail Address:

Appointment **Send Mailings**

Your appointment is on Thursday, January 30 at 9:00 am with Dr. Mitchell at the Oak Ridge for a Clean n Check > 3 yrs. Confirmation Letter

STEP 5

[save](#) [close](#)

Appendix A: Other Ways to Make an Appointment (cont.)

Version 3: Add a New Patient

Step 1: Click on “Add a new patient” and a New Patient Intake Form will load.



V 3

July 17, 2003

show clinic: show provider: find appointment type: length: min

							▼ Scroll ▲	Landon Binstock	James Mitchell	Christy Smith
9:00 am							Joyce Carol Hearing Exam	Ned Divine Hearing Exam		
9:15 am										
9:30 am										
9:45 am										
10:00 am								Leo Berns Clean n Check	Blaine Fuller Hearing Exam	
10:15 am							Christin Ridge			
10:30 am										
10:45 am										
11:00 am										
11:15 am										
11:30 am										
11:45 am										
12:00 pm										

Printable Schedule:

enter patient
 STEP 1

Step 2: New Patient Intake Form - Enter as much information as possible and click “save”. The Patient Search page loads showing the new patient (Myra Wallace). **Note:** the Patient Intake form can be printed and given to the Patient to complete at the time of his or her appointment

identity

Title: Patient Type:
 First Name: Gender:
 Middle Initial: Date of Birth:
 Last Name: Preferred Language:
 Suffix:
 Preferred Name:

Street 1: **Phone Numbers** **Primary**
 Street 2: Home:
 City: Work:
 State/Province: Cell:
 Zip/Postal Code: Other:
 Country: Email Address:

snowbird address

Street 1:
 Street 2:
 City:
 State/Province:
 Zip/Postal Code:
 Country:

STEP 2

Appendix A: Other Ways to Make an Appointment (cont.)

Step 3: The search results page loads showing your new patient (Myra Wallace) **Click on the “appt” link.**

The screenshot shows a search interface with a purple header. The header contains a search bar with the text 'myra', a 'search' button, a 'search all clinics' button, and a link 'Add a new patient'. There is also a 'close' button in the top right corner and a link 'archive search' in the bottom right corner. Below the header, the text 'Search Result - Oak Ridge, Active Patients' is displayed. Underneath, it says 'showing results 1-1 of 1 for 'myra''. A table follows with columns for 'Patient Name', 'Phone Number', 'L', 'R', and 'Action'. The table contains one row for 'Myra C Wallace' with phone number '(316) 345-3490 (home)'. The 'Action' column for this row contains the links 'appt', 'purchase', and 'repair'. A red box with the text 'STEP 3' is overlaid on the 'appt' link.

Patient Name	Phone Number	L	R	Action
Myra C Wallace	(316) 345-3490 (home)			appt purchase repair

Step 4 – Step 6: Refer to Steps 3, 4 and 5 described above (see version 2). Select the **Date and Time**, enter **New Appointment** by selecting type of appointment and referral source, then verify information by clicking save on the **Appointment Confirmation**.