Sycle User Guide

Last Updated: October 2018

Miracle-Ear®

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Steps to Perform Basic Sycle Activities

Sycle.net is the Miracle-Ear front office software used to manage appointments, sales revenue and the marketing efforts for each hearing aid office. There are four modules in the software program that allows the functions of appointment scheduling, sales reporting and marketing efforts. The four modules are as follows:

1. **Appointments:** This section is used most frequently by the front office staff for daily activities. In this module, there are functions for appointment scheduling, creating a Purchase Summary, storing patient data in the Customer Summary, linking to NOAH Sycle sync and documenting the outcome of the appointment.
2. **Reports:** The reports are formulated from the data that has been entered into the system. To assure that the reporting is accurate, data integrity is crucial. This means that it is the responsibility of the staff to enter the data as it occurs with accuracy. These reports, create historical documentation for staff and owners to use as a tool to track cumulative totals during a designated time period for:
   a. Appointments scheduled and completed
   b. Sales Revenue
   c. Marketing performance
3. **Marketing:** The marketing section tracks the results of marketing mediums called Referral Sources. The reports are totaled by appointment and sales revenue performance for each Referral Source. This module also allows the staff to pull lists of Customer Types segmented by criteria. These lists are used for the purpose of aftercare follow up or marketing initiatives.
4. **Administration:** The administration section allows the user to set up basic functions in Sycle. The functions in this module are accessed by an owner or designated staff. Those with administration privileges are allowed to create a template that auto populates information such as marketing Referral Subcategories, pricing, tax or discount rates. Staff information and privileges are also set up in this module.

An important responsibility of the Front Office Associate (FOA) is to enter patient data into the system correctly. All patient data entered in Sycle, from scheduling an appointment to a entering a purchase, feeds into the reporting module. Reports in Sycle are used to track marketing results, sales performance and Key Performance Indicators (KPIs) for the staff.

In addition, using Sycle has many support benefits for each office such as:

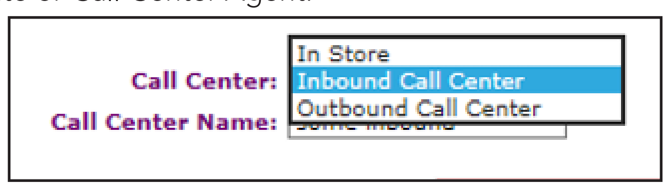
1. Automates every task from scheduling to reporting
2. Helps to grow the patient database
3. Gives immediate access to patient information
4. Increases patient satisfaction when staff can provide instant information access
5. Web based access to tracking sales revenue and Key Performance Indicators
6. Links appointments to marketing sources in the marketing reporting module
7. Sales results reporting by marketing type, which provides insight into which marketing pieces are the most effective for the office
8. HIPAA compliant environment

LOGGING IN

1. Sycle.net can be accessed in two ways:
   a. www.mymiracle-ear.com
   b. www.portal.miracle-ear.com (there is a link to Sycle.net on this webpage)
2. To access Sycle, a username and password is assigned by the franchise owner or admin staff. The owner can assign the username and password in Sycle in the Administration Module.
3. For assistance setting up new staff:
   a. Administration Module Guide
   b. Help Desk 1-800-456-6610

ENTERING A NEW STAFF IN ADMINISTRATION MODULE

1. Scroll to the **Staff** section at the bottom of the screen
2. Click on **create a new staff member**
3. Enter the staff member's **first and last name**
4. Assign **password**
5. Assign priviledges in Sycle.net by checking the appropriate boxes
   a. Suggested FOA access privileges (to be assigned by franchise owner):
      i. View own appts
      ii. View own reports
      iii. View Marketing reports
      iv. Data Hygiene *(if applicable)*
      v. View AP reports and Manage Consignment Stock (*If PO functionality is enabled for franchise)*
6. Designate a sub type for each Front Office Associate or Call Center Agent.
   a. Select from the following:
      i. In store
      ii. Inbound call center
      iii. Outbound call center



   b. If the FOA is a call center agent, enter a name for the call center the FOA is assigned to. The call center name designated for the FOA creating the appiontment will be visible on the appointment schedule.

NOTE: Always log in with your own Sycle credentials.

A call center agent can edit which call center they are working with when creating the appointment. For example, if an agent normally works in an inbound call center, but today is working with the outbound call center, the *booked by* can be edited for the appointments created. The call center name set up for the staff member will remain the same.

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7. Add an **email address** for the staff member
8. If the staff member will need access to the Learning Management System (LMS)/eLearning, click the **Register for LMS** check box
9. Use the **LMS manager drop-down menu** to choose the employee who will have access to manage the new staff member in the LMS.
   NOTE: Please allow 24-hours for the LMS to be updated with the employee's new account. An email will be sent to the learner at the email address added to Sycle.
10. **SAVE** before closing

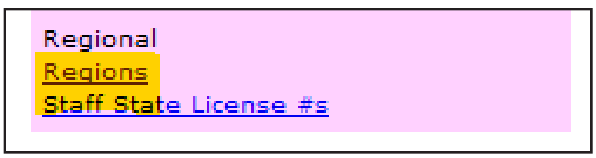
ENTERING STAFF/STORE INTO A REGION

To provide reporting that enables regional managers to prioritize their store visits or determine locations to coach and train, a region can be established. The reporting will also allow comparisons between regions, which can be useful for the owners' analysis.

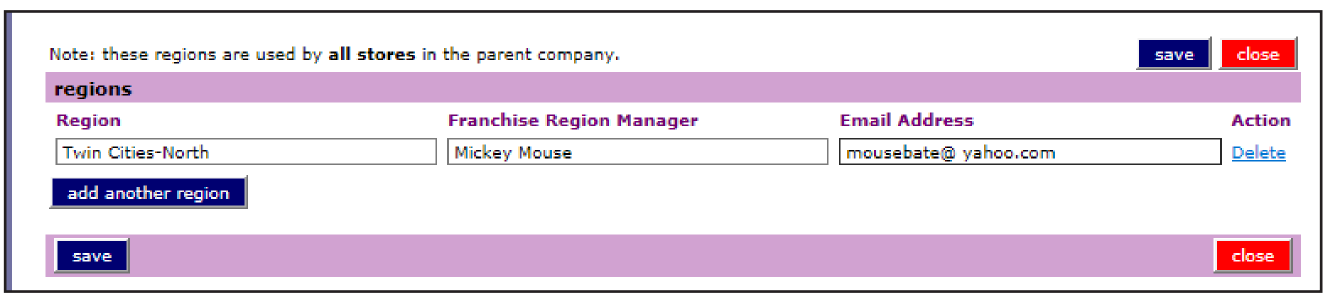
If your franchise does not have regional managers, create one region and assign the franchise owner as the manager. This will enable the franchise owner to receive regional reporting.

To create a region for each store: (**Note:** you must have Admin priviledges or an Owner login)

1. Scroll down to the **Regional** section in the left column of the Admin module
2. Click **Regions**



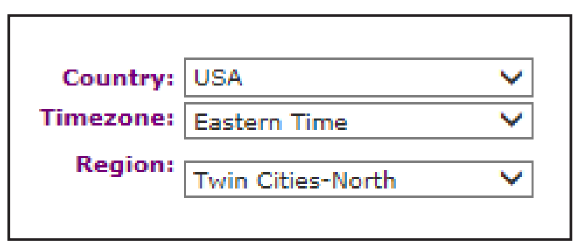
3. Enter the **Region Name**, **Region Manager** and **Email Address** for each store.



4. Click **save**
5. If applicable, click **add another region**, then repeat steps 3 and 4 for each region.

To assign each office to the appropriate region:

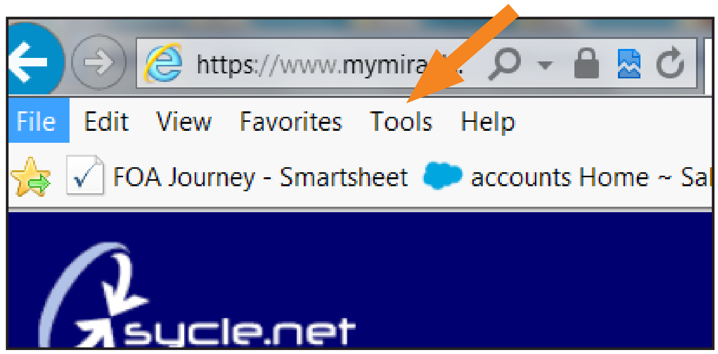
1. From the Admin module, scroll down to the **store profile** section.
2. Click **Edit**.
3. Use the Region drop-down list to **select the appropriate region**.
4. Click **save**.



BROWSER COMPATIBILITY

- Sycle is currently only compatible with Internet Explorer. Using Google Chrome can affect reporting and other functions.
- When logging into Sycle, make sure the popup blockers are turned off in the **Tools** drop down at the top of the screen.

  Note: This will eliminate functionality issues when entering exchanges.



Sycle.net Training Resources

LEARNING MANAGEMENT SYSTEM (LMS)

The Learning Management System, linked on the Miracle-Ear portal, has a series of Sycle.net classes to learn the basic functionality. The Sycle classes are included in the Miracle-Ear Certification Program. The LMS can be reached in two ways:

- www.portal.miracle-ear.com (Learning Management System link under the eLearning section)
- Directly at https://performancemanager5.successfactors.eu/login?company=113141P

To acquire a password for the Learning Management System, the franchisee or designated staff should contact the Service Desk at 1-800-456-6610.

SYCLE ACTIVITY WORKBOOK

The Sycle Activity Workbook was designed as a practice tool to use in conjunction with the practice test site available on the Miracle-Ear Portal.

To provide the best experience for everyone who will be using the Sycle test site to practice using the new features, please review the guide below to determine the appropriate **username and password** to use, as well as which **test location** should be used once you log in. This will help to distribute the number of learners using the site at any given time so the system will run smoothly for all.

To access the test site:

1. Go to the Miracle-Ear portal: www.portal.miracle-ear.com
2. Click the test site link called **Testing Site for Sycle.net**

Find Your Login Information

Western US

Includes AK and HI

Staff Login Info

Username: Test1
Password: Welcome1

Admin Login Info

Username: admin123
Password: Amp_Training123

Northern Region

Includes AK & HI

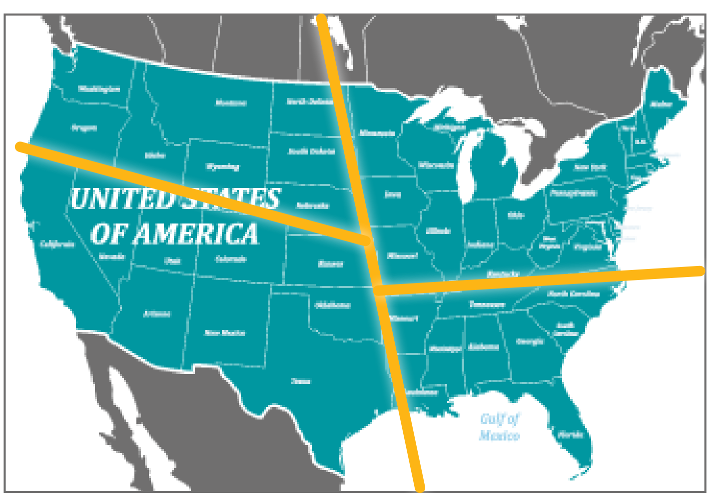
Select either of the following locations:

- 01
- 02

Southern Region

Select either of the following locations:

- 03
- 04



Eastern US

Includes Puerto Rico

Staff Login Info

Username: miracleear14
Password: Amp_Testing01

Admin Login Info

Username: miracleear2
Password: Welcome1

Northern Region

Select either of the following locations:

- Edina
- Plymouth

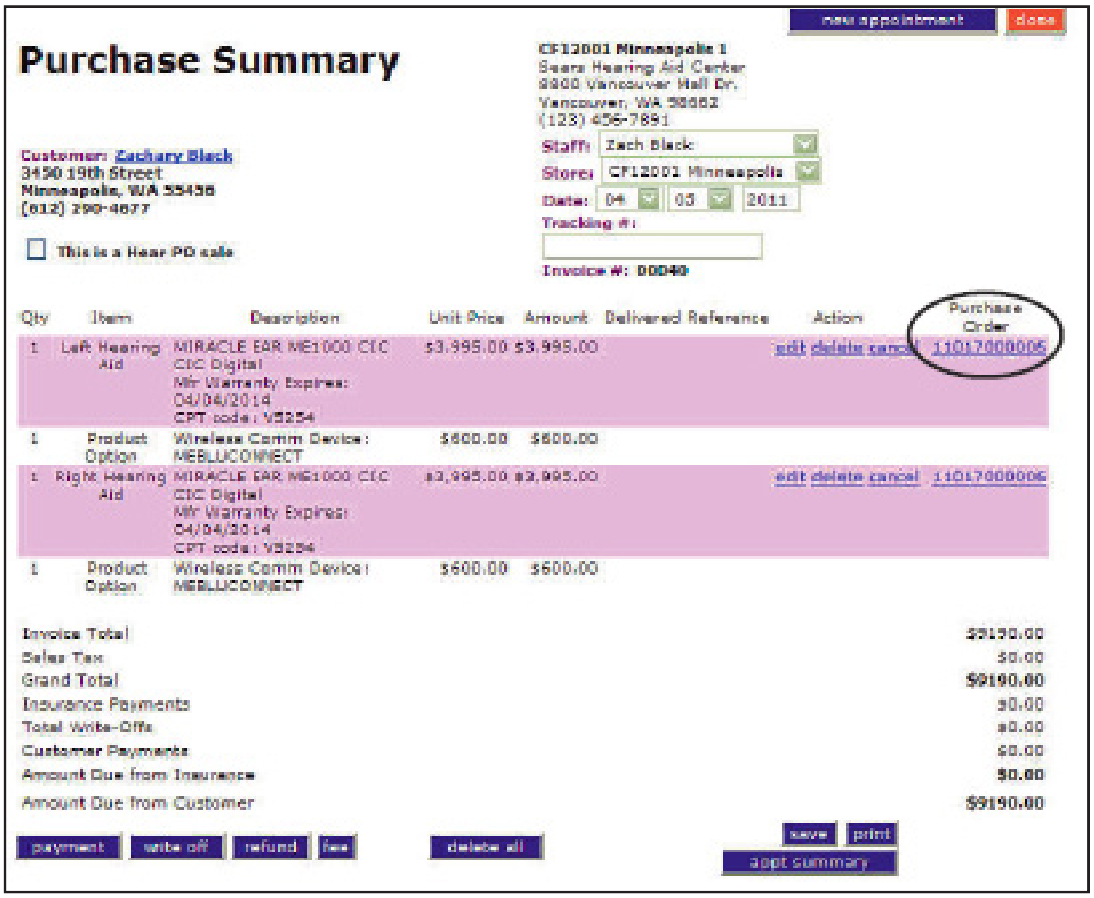
Southern Region

Select either of the following locations:

- Minneapolis
- St. Paul

AP/PO ENABLED SYCLE

This version tracks all transactions with a purchase order. If your office uses the AP/PO version, there will be a purchase order number across from the product on the Purchase Summary as shown below:



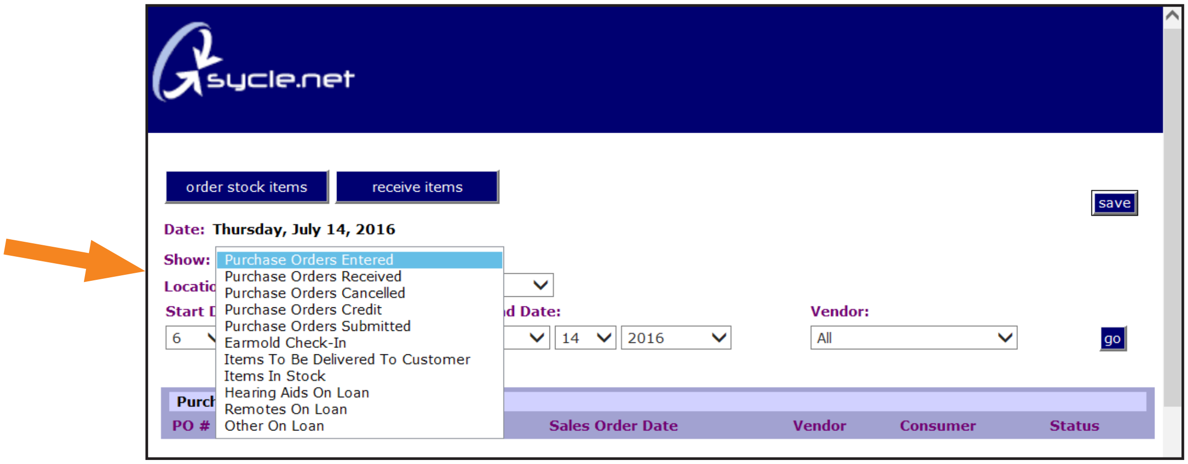
In the AP/PO enabled version of Sycle, the hyperlink creates a purchase order designed to track three order status functions:

1. Submit
2. Receive
3. Deliver

Note: Non AP/PO Sycle does not have a Purchase Order link on the Purchase Summary.

AP/PO SYCLE INVENTORY

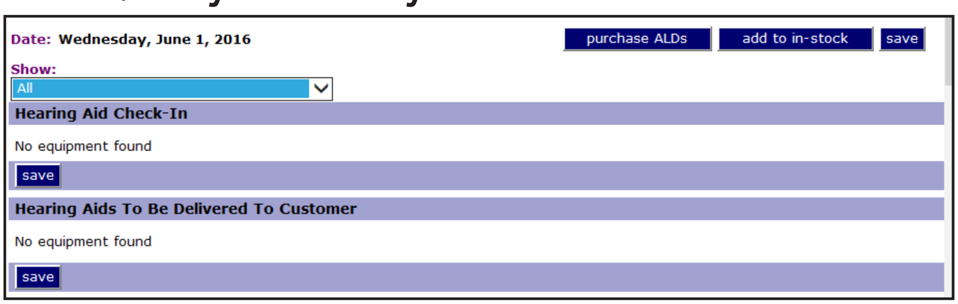
To find the AP/PO Sycle Inventory, click the purple **Inventory** section of the Appointment Screen:



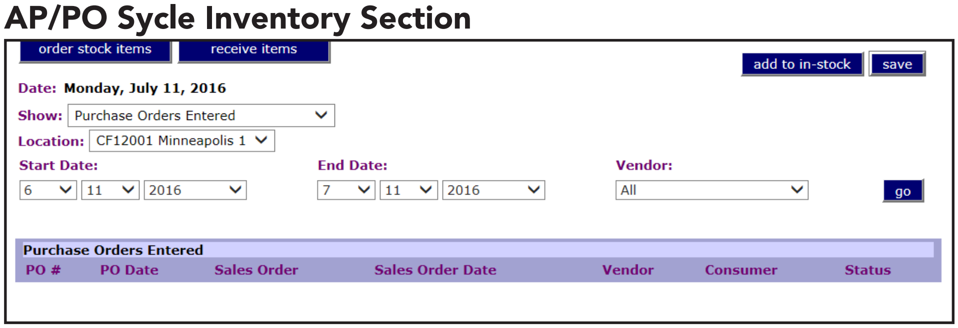
Note: The Purchase Order functionality and enhanced inventory reporting are not available in the non AP/PO enabled Sycle.

The Inventory section in the non AP/PO enabled and the AP/PO Sycle will have two different Inventory screens in the drop down menu, as shown below:

Non AP/PO Sycle Inventory Section

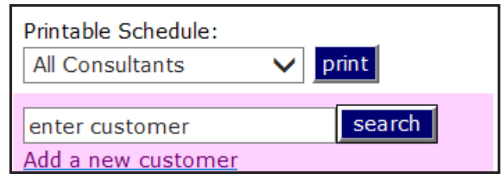


AP/PO Sycle Inventory Section

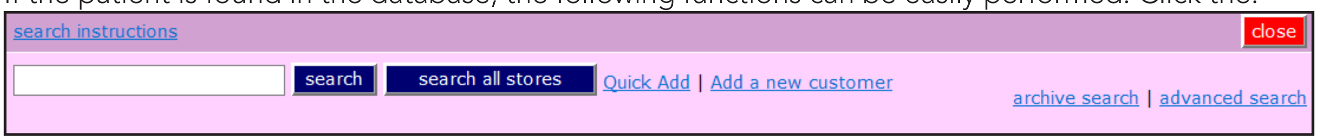


SEARCHING FOR A PATIENT

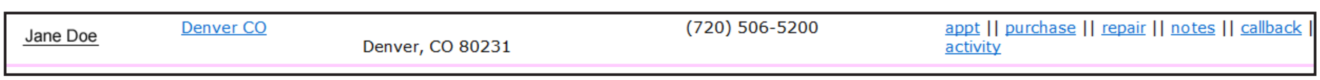
1. Go to the **Appointment** screen
2. In the drop down box, select the correct **location** for the patient (example shown at left)



3. Search for the patient's name using at least the first three letters of the patient's first AND last name
4. The patient's name should appear at the top of the customer list (example shown under item 6 below)
5. If no matches are found, first try changing your search parameters, including:
    - patient's whole name
    - search by all stores
    - archive search
    - advanced search
    - email search
6. If the patient is found in the database, the following functions can be easily performed. Click the:



- **Appt** button to schedule an appointment
- **Purchase** to create a non hearing aid purchase
- **Notes** to enter appointment notes discussed with caller. E.g. *06-19-2018 K.D. Patient's spoiuse has questions (always begin with the date and your initials)*
- **Callback** as a reminder to call the customer back
- **Patient name** to view more detailed information in the Customer Summary

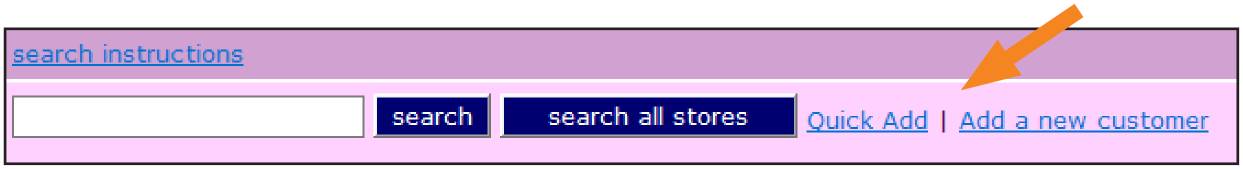


Note: The remaining buttons that appear in this section should be used as follows:

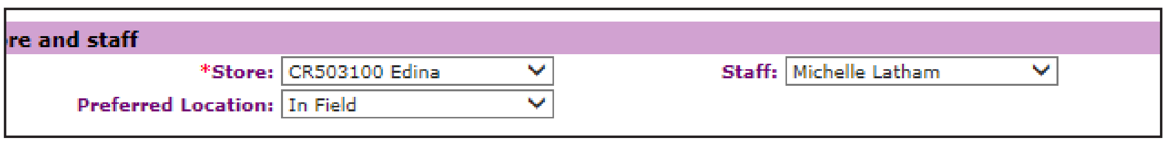
- The **purchase** link in this section is designated for ***non hearing aid purchases***. To create a hearing aid purchase, an appointment with the outcome results must be completed.
- To create a ***hearing aid repair,*** go to the **Customer Summary** and scroll down to **Current Equipment**. Click on the **repair button** to repair the hearing aid the customer is currently wearing.

ADDING A NEW PATIENT

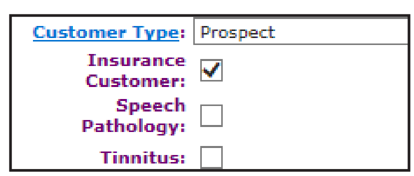
1. If the caller is not found in the database, click either the **Quick Add** or **Add a new customer link**
   - Both the Quick Add and Add a new customer link will create a new customer summary



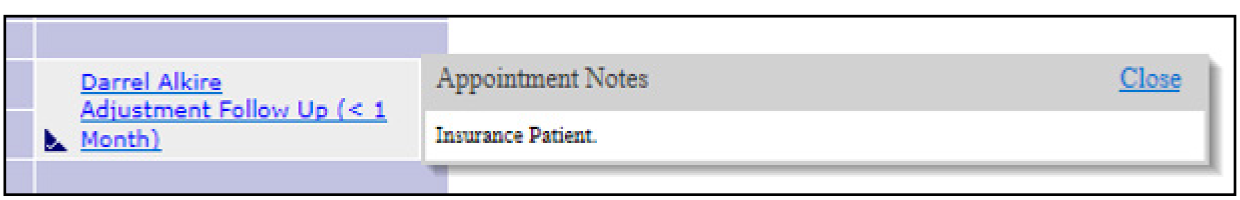
   - Whenever possible, utilize the Add a new customer link, as this will create a complete customer summary right away
   - If Quick Add is used, please note that additional information will need to be added to the customer summary at a later time
2. Enter the caller's information, including:
   - **Identity:** demographic information (name, address, and phone number)
   - **Original Referral Source:** marketing source the patient responded to
   - **Store/Staff:** location and staff currently working with
   - **Preferred Location:** the location the patient prefers to meet in (in store, in home, in field)



   - **Employment:** employer contact information if applicable
   - **Marital status**: if applicable
   - **Snowbird address:** if patient has a second home or vacation residence to contact when not located in home state
   - **Privacy:** Checking these boxes gives permission to send email, texts or call or mail to the patient. Uncheck to disable permission.
   - **Emergency contact:** friend or family member designated by the patient to handle health issues of the patient
   - **Responsible party:** person designated as responsible for the health insurance or payment of the hearing aids
   - **Insurance:** Add any insurance company information in this section to auto populate the insurance claim form. If insurance information has been added to the Customer Summary, click the *insurance customer* checkbox at the top of the full intake screen.



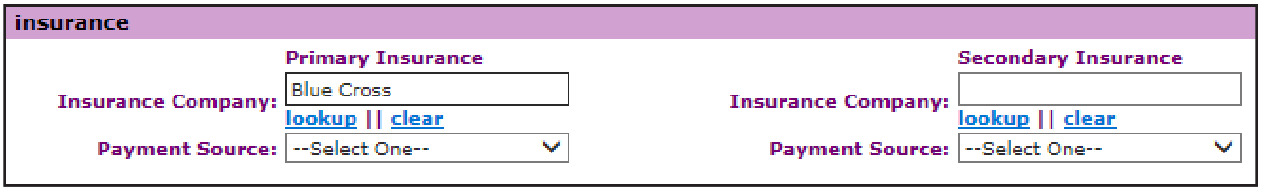
     - If this flag is checked, the patient will be identified as an insurance customer in the appointment notes when the staff hovers over the appointment.



- The information entered primary insurance company field will populate in the Appointment Detail report. Enter the type of insurance in the primary field that should be billed or has the insurance benefit.

  The Marketing List called Insurance Customer populates the information entered in the primary and secondary fields of the Customer Summary.

  Use the insurance company lookup selector shown below to find the insurance company.



- **Hearing loss:** if the patient has an audiogram from prior appointments it can be entered here
- **Current equipment:** if the patient currently wears hearing aids they can be entered prior to the appointment for reference
- **Custom Group:** a group that the patient is associated with such as a service center, club or organization. This list can be pulled to mail or call from the Marketing List reports. Custom groups must have been entered under the Admin section in order to choose this option.

3. **Save** any information added

Customer Summary

PERFORMING ACTIVITIES IN THE CUSTOMER SUMMARY

The Customer Summary stores the information to create a patient record and all activity associated with that patient. The information can (and should) be edited or updated as needed. Click on **edit full intake** or **quick edit** to make any changes and remember to **save** them.

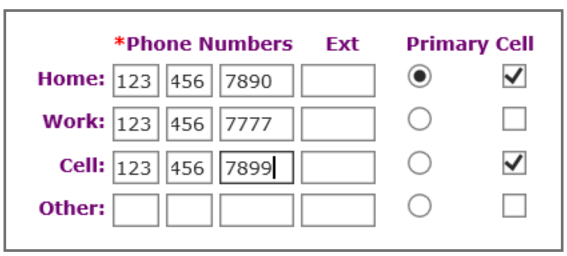
The following sections are found in the summary:

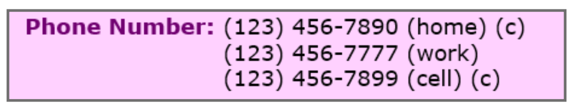
- **Identity**: customer demographics (name, address, email address, and phone numbers)
    - Email: If the email entered in the Customer Summary is invalid, a message will appear in the Customer Summary and the New Appointment screen to prompt staff to correct it.

This message appears when an email has been entered incorrectly. Update the email, then save.

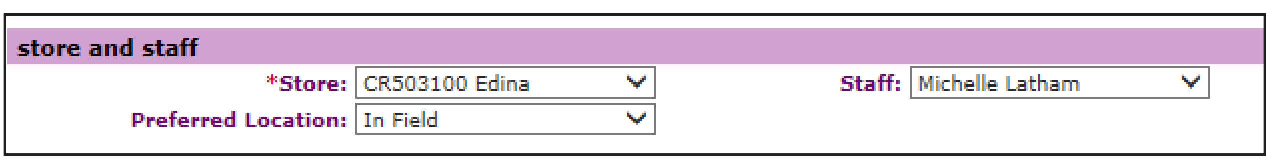
This message appears when the franchise is enrolled in data hygiene and there is an email address update.

- **Phone:** Indicate the primary number and which are cell phone numbers using the check boxes shown here.





- **Store/Staff:** office the patient visits and Hearing Care Professional that provides their care
    - **Store:** The office the patient primarily visits
    - **Staff:** The HCP the patient works with most often
    - **Preferred Location:** The location the patient prefers to meet in (in store/in home/in field)
      The location can be updated when the appointment is made, as well, to accomadate one-offs. If the appointment will not take place in the office, the location (in field/in home) will appear in the appointment on the schedule and Sycle will remind you to schedule drive time.



- **Healthiplan:** Healthiplan financing plan is integrated into Sycle and can be activated for the individual patient in this section
- **Referral Source:** the marketing source that prompted the patient's call
- **Custom Group:** a group that the patient is associated with such as a service center, club or organization. This list can be pulled to mail or call from the Marketing List reports. Custom groups must have been entered under the Admin section in order to choose this option.
- **Employment Status:** shows the employment status, employer, or student status
- **Marital Status:** marital status, spouse's name, and whether the spouse is a customer
- **Privacy:** HIPAA waiver signed, OK to call, OK to mail, OK to email, OK to text
    - The last update made to the Customer Summary will display: date, time and user EST in the top right corner of the screen.
    - For Franchises enrolled in Data Hygiene:
        - When Data Hygiene records for a patient are accepted as deceased, the patient record will be automatically archived.
        - If a patient record is rejected, the record will not be archived.
        - If a patient is listed in the National Do Not Call Registry the record will be automatically updated to uncheck the *ok to call* checkbox.
        - If a record is not updated in data hygiene 10 days after the data hygiene files have been loaded into Sycle, the privacy section will auto uncheck the checkboxes for *OK to call, OK to mail, OK to email, OK to text*. If needed, manually update the privacy section accordingly.
- **Emergency contact:** patient's alternate contact ie; spouse or adult son or daughter, phone and email address of contact
- **Responsible party:** insurance or billing contact information, such as name, address, phone, email and relationship to patient
- **Background:** requires the following information: Previous Consultant and Phone, Primary Physician, and Referring Physician
- **Primary Physician:** Physician
- **Activity request:** track mail sent with hearing loss packet including information and symptoms of hearing loss and the services that Miracle-Ear provides
- **Notes:** All appointment notes should begin with the entry date and the user's initials. Notes created to document comments or results from the appointment are stored in the Customer Summary. Notes created when the appointment is scheduled will be stored in the Customer Summary and when you hover over the appointment on the schedule the notes will be displayed. These notes will auto populate HealthiPlan preapprovals or if the patient is an insurance customer.
- **Appointments:** appointment history with date and type of appointment, outcome notes from appointment, and referral source from appointment

- **Waiting list:** The waiting list requires the following information: a date range, appointment type, length and staff
- **Callback:** set up future call reminders to patient, including notes, for a specific date and time
- **Hearing loss:** level of loss determined from last test
- **LACE:** generate LACE sessions for patients that can be tracked from online integration of program
- **Current Equipment:** The current hearing aids the patient is wearing. There is also historical information stored on past hearing aid purchases and the status of the serial number for the hearing aid. This is the section where an exchange, return or repair can be created for the current hearing aid.
- **Repairs:** Any hearing aid repairs sent in to the manufacturer
- **Invoices:** history of all purchases made by the patient
- **Claim forms:** HCFA form for insurance submission. Patient demographic information auto populates on this form, as well as the Primary Insurance Company information from the Customer Summary. The form can be printed and then sent to the insurance company for billing purposes.
- **Mail History:** shows a listing of all correspondence with the patient
    - **CRM letters sent:** CRM letters mailed to the patient with the date and type of letter
    - **Emails sent:** Email confirmations sent to the patient
    - **Text history with response:** Text history, including whether the patient responded to a text with a confirmation

mail history

Date Sent	Title	Offer Presented
2009-10-18	Birthday Card	
2010-08-08	Customer Trade-Up Letter	
2010-10-17	Birthday Card	

email history

Date Sent	Title	Offer Presented

text history

Sent/Received	Date Sent	Detail	Offer Presented

Note: Offers presented will be added in a future update to the section shown above

- **Intake form:** Intake information for the patient record can be filled out and printed for the file or retained in Sycle

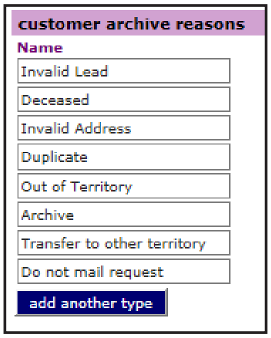
Customer Types

There are four customer types within Sycle, which are definted as follows:

1. **Current User:** A customer that has a Miracle-Ear hearing aid entered into the Current Equipment section of the Customer Summary
2. **Prospect:** A potential customer that is entered into the database but does not have a Miracle-Ear hearing aid purchase entered into the Current Equipment section of the Customer Summary. A patient that returned their hearing aid should be manually changed back to a Prospect (check with your manager for further instruction).
3. **Competitive User:** A potential customer entered into the database that has purchased a hearing aid from a competitor. When entering them into the database, add the type of hearing aid they currently wear into the Current Equipment section of the Customer Summary.
4. **Archived User:** A Current, Prospect or Competitive User that is set to inactive status

ARCHIVE USER BEST PRACTICES

- Consult your franchise owner for archiving rules
- Archiving takes the patient out of the database.
- Taking a patient out of the database does not allow future marketing efforts
- Reasons to archive can be set up in admin section to segment archived customers (examples shown to the right)



UNARCHIVING A USER RECORD

Any customer or potential customer that has been Archived can be unarchived by completing the following steps in Sycle:

1. Search for the patient in the ***appointment screen search box***
2. Click on **archive search**
3. Locate the patient in the ***archive list***
4. Click on **unarchive**
5. **Save**

This will place the customer back in an active customer list from the original status.

ARCHIVED USER LISTS

Note: To access this report, Marketing List privileges must be assigned by the franchise owner.

To create a list of archived customers, complete the following steps:

1. Go to the ***Marketing Module/ Marketing Lists***
2. Click on the **Archive report** in the menu

Appointments and Appointment Types

There are thirteen standardized appointment types that each have specific sub types to define the purpose of the appointment. The following chart defines each Miracle-Ear Appointment Type and Sub Type.

APPOINTMENT TYPE: SCREENING

Sub-Type	Objections	Outcomes	Definition	Customer Type
Screen/ Test	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Lease • Needs further evaluation • Referral program patient • Trial • Test completed • Purchase made	Diagnostic screening with the purpose of evaluating a prospects hearing for insurance, government or a corporation inside or outside of the office	Prospect, Comp User
No or Partial test			Appointment to screen patient for hearing loss, inside or outside the office ie; Health Fair, VO screening	Prospect, Comp User

APPOINTMENT TYPE: ONLINE HAE

Sub-Type	Objections	Outcomes	Definition	Customer Type
HAE Booked Online	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Lease • Needs further evaluation • Referral program patient • Trial • Test completed • Purchase made	Comprehensive Hearing Evaluation for the purpose of selling a hearing aid booked by the patient online	Prospect, Comp User

APPOINTMENT TYPE: HAE/CONSULTATION

Sub-Type	Objections	Outcomes	Definition	Customer Type
Complete HAE	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral **Additional Checkboxes** • Lease • Needs further evaluation • Referral program patient • Trial • Test completed • Purchase made	Comprehensive Hearing Evaluation for the purpose of selling a hearing aid	Prospect, Comp User
Follow Up		**Standard Options** • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral **Additional Checkboxes** • Consultation • Lease • Needs further evaluation • Referral program patient • Trial • Test completed • Purchase made	Additional consultation or to complete the hearing aid evaluation needed for the purpose of selling a hearing aid	Prospect, Comp User
Med Ref Follow Up		**Standard Options** • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral **Additional Checkboxes** • Consultation • Lease • Needs further evaluation • Referral program patient • Trial • Test completed • Purchase made	Additional consultation or to complete the hearing aid evaluation needed for the purpose of selling a hearing aid for a prospect that was a medical referral	Prospect, Comp User

APPOINTMENT TYPE: HAE/CONSULTATION *(CONTINUED)*

<table>
<tr><th>Sub-Type</th><th>Objections</th><th>Outcomes</th><th>Definition</th><th>Customer Type</th></tr>
<tr><td>Call - Follow Up</td><td rowspan="2">• Price objection
• Shopping around
• Thinking it over
• Doubt test results/denial
• Ins benefit too low or N/A
• Questions brand/product
• Financing declined
• To discuss with companion
• Have veteran’s benefits
• Not enough time
• Not ready</td><td>Standard Options
• Companion present yes/no
• Speech Pathology
• Tinnitus
• Medical Referral
Additional Checkboxes
• Contacted and discussed
• Hasn’t purchased yet
• Left message
• Purchased elsewhere</td><td>Call to prospect that was tested/ had loss/ but did not purchase</td><td>Prospect</td></tr>
<tr><td>Prospect Annual Retest</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Demo new technology
• Lease
• Needs further evaluation
• Referral program patient
• Trial
• Test completed
• Purchase made</td><td>Comprehensive Hearing Evaluation for the purpose of selling a hearing aid for previously tested prospect/ competitive</td><td>Prospect, Comp User</td></tr>
</table>

APPOINTMENT TYPE: IMPRESSIONS ORDER

Sub-Type	Objections	Outcomes	Definition	Customer Type
Ear mold impression	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran’s benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • iScan • Ordered earmold • Purchase made	Appointment for the sole purpose of taking an impression for hearing aids or earmolds	Prospect, Comp User, Current

APPOINTMENT TYPE: DELIVERY

<table>
<tr><th>Sub-Type</th><th>Objections</th><th>Outcomes</th><th>Definition</th><th>Customer Type</th></tr>
<tr><td>HA - Initial Fitting</td><td rowspan="2">• Price objection
• Shopping around
• Thinking it over
• Doubt test results/denial
• Ins benefit too low or N/A
• Questions brand/product
• Financing declined
• To discuss with companion
• Have veteran's benefits
• Not enough time
• Not ready</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Delivery complete
• Delivery incomplete
• Aural Rehab Recommended
• Modified HA
• Product Issue
• Referral Program patient</td><td>Initial delivery appointment of a hearing aid</td><td>Current</td></tr>
<tr><td>HA - Initial Redelivery</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Delivery complete
• Delivery incomplete
• Loss And Damage Delivery
• New Product Received
• Patient Not Satisfied
• Patient Satisfied
• Repair Delivery</td><td>Follow up delivery of hearing aid from initial fitting</td><td>Current</td></tr>
</table>

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APPOINTMENT TYPE: DELIVERY *(CONTINUED)*

Sub-Type	Objections	Outcomes	Definition	Customer Type
HA - Repair/ Service	• Price objection • Shopping around • Thinking it over • Doubt test results/de-nial • Ins benefit too low or N/A • Questions brand/prod-uct • Financing declined • To discuss with com-panion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/ no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Delivery complete • Delivery incomplete • Loss And Damage Deliv-ery • New Product Received • Patient Not Satisfied • Patient Satisfied • Repair Delivery • Purchase Made	Follow up delivery of hearing aid for remake, repaired, Loss & Damage, or exchanged hearing aids	Current, Comp User
Accessories/ Earmold		**Standard Options** • Companion present yes/ no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Delivery complete • Delivery incomplete • Accessories Received • Earmold Received • Test Completed • Purchase Made	Appt to deliver accessories or ear molds to patient	Current, Prospect, Comp User

APPOINTMENT TYPE: ADJUSTMENT FOLLOW UP

Sub-Type	Objections	Outcomes	Definition	Customer Type
Phone Call	• Price objection • Shopping around • Thinking it over • Doubt test results/de-nial • Ins benefit too low or N/A • Questions brand/prod-uct • Financing declined • To discuss with com-panion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Contacted and discussed • Left message	Follow up phone call to patient after delivery of hearing aid, aftercare appt, service issue	Current
< 1 Month		**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Aural Rehab Recommended • Modified HA • Patient Not Adapting to Aids • Programming Adjustment • Cleaned HA • Test Completed • Purchase Made	Follow up aftercare appt in initial period after delivery of a hearing aid (**less than 1 month after delivery**)	Current
< 3 months		**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Aural Rehab Recommended • Modified HA • Patient Not Adapting to Aids • Programming Adjustment • Cleaned HA • Test Completed • Purchase Made	Follow up aftercare appt in initial period after delivery of hearing aid (**2-3 months after delivery**)	Current

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APPOINTMENT TYPE: AFTERCARE

<table>
<tr><th>Sub-Type</th><th>Objections</th><th>Outcomes</th><th>Definition</th><th>Customer Type</th></tr>
<tr><td>Clean and Check</td><td rowspan="2">• Price objection
• Shopping around
• Thinking it over
• Doubt test results/denial
• Ins benefit too low or N/A
• Questions brand/product
• Financing declined
• To discuss with companion
• Have veteran's benefits
• Not enough time
• Not ready</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Demo New Technology
• Modified HA
• Needs Further Evaluation
• Needs Model Exchange
• Programming Adjustment
• Cleaned HA
• Test Completed
• Purchase Made</td><td>Follow-up aftercare every 4-6 months for cleaning, REM verification, programming</td><td>Current, Comp User</td></tr>
<tr><td>Rehab</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Patient Not Adapting to Aids
• Reviewed Results</td><td>Follow up aftercare for auditory training programs such as LACE</td><td>Current</td></tr>
</table>

APPOINTMENT TYPE: ONLINE AFTERCARE

Sub-Type	Objections	Outcomes	Definition	Customer Type
Aftercare booked online	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Demo New Technology • Modified HA • Needs Further Evaluation • Needs Model Exchange • Programming Adjustment • Test Completed • Purchase Made • Cleaned HA	Follow-up aftercare every 4-6 months for cleaning, REM verification, programming	Current

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APPOINTMENT TYPE: MODEL CHANGE

Sub-Type	Objections	Outcomes	Definition	Customer Type
Exchange HA	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Demo New Technology • Model Exchanged • Model not Exchanged • Needs Further Evaluation • Test Completed • Purchase Made	Appointment specifically to exchange or upgrade the model of a previously delivered hearing aid	Current

APPOINTMENT TYPE: ANNUAL RETEST

Sub-Type	Objections	Outcomes	Definition	Customer Type
Years 1-3	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Demo New Technology • Modified HA • Needs Further Evaluation • Programming Adjustment • Cleaned HA • Repurchased • Test Completed	Comprehensive annual follow-up evaluation for patient currently wearing a Miracle-Ear hearing aid for 1-3 years (use when hearing aids are still in warranty)	Current
Call - Trade Up		**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Hasn't repurchased yet • Purchased elsewhere • Left message	Call to current patient to schedule annual retest for purpose of demonstrating new technology and presenting the Trade Up program	Current
Years 3+		**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Demo New Technology • Modified HA • Needs Further Evaluation • Programming Adjustment • Repurchased • Cleaned HA • Test Completed	Comprehensive annual follow-up evaluation for patient currently wearing a Miracle-Ear hearing aid for over 3 years (use when hearing aids are out of warranty)	Current

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APPOINTMENT TYPE: HA SERVICE

Sub-Type	Objections	Outcomes	Definition	Customer Type
Loss and Damage	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Extended Warranty • Repaired Damaged Aid • Replacement Ordered • Retest Needed • Test Completed • Purchase Made	Appointment for patients that have lost/damaged hearing aids in /out warranty	Current
Trouble with HA		**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Cleaned HA • Demo New Technology • Modified HA • Needs Further Evaluation • Patient Not Satisfied • Patient Satisfied • Programming Adjustment • Test Completed • Purchase Made	Appointment for patient experiencing issues or needing repair with a hearing aid in or out of warranty	Current, Comp User

APPOINTMENT TYPE: RETURN

<table>
<tr><th>Sub-Type</th><th>Objections</th><th>Outcomes</th><th>Definition</th><th>Customer Type</th></tr>
<tr><td>Potential Return</td><td rowspan="2">• Price objection
• Shopping around
• Thinking it over
• Doubt test results/denial
• Ins benefit too low or N/A
• Questions brand/product
• Financing declined
• To discuss with companion
• Have veteran's benefits
• Not enough time
• Not ready</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Product returned
• product not returned
• Demo New Technology
• Model Exchanged
• Needs Further Evaluation
• Patient Not Satisfied
• Patient Satisfied
• Test Completed
• Purchase Made</td><td>Appointment for patients requesting to return hearing aids</td><td>Current</td></tr>
<tr><td>Lease Return</td><td>Standard Options
• Companion present yes/no
• Speech pathology
• Tinnitus
• Medical referral
Additional Checkboxes
• Demo New Technology
• Lease End Returned
• New lease
• Purchase leased HA
• Purchase new HA</td><td>Appointment for patients at the end of their lease period</td><td>Prospect, Current</td></tr>
</table>

APPOINTMENT TYPE: WALK IN

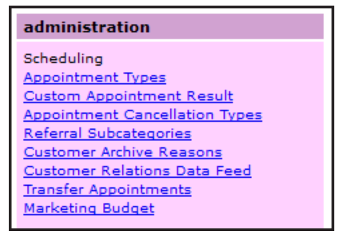
Sub-Type	Objections	Outcomes	Definition	Customer Type
Miscellaneous purchases	• Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product • Financing declined • To discuss with compan-ion • Have veteran's benefits • Not enough time • Not ready	**Standard Options** • Companion present yes/no • Speech pathology • Tinnitus • Medical referral **Additional Checkboxes** • Cleaned HA • Sales Opportunity • Set Up Appt • Test Completed • Purchase Made	Miscellaneous appt created for walk ins or other situations to purchase accessories or batteries	Current, Prospect, Comp User

APPOINTMENT TYPES IN SYCLE

Every franchise uses the same standard Miracle-Ear Appointment Types and Subtypes shown above. The complete list of the required Appointment Types and Subtypes are also displayed in the Administration Module/ Appointment Types and on the schedule screen. A selection for the Appointment Type/Subtype will be made when scheduling each appointment based upon the patient's needs.

Selections for the following are made in the Administration Module for the standardized appointment types.

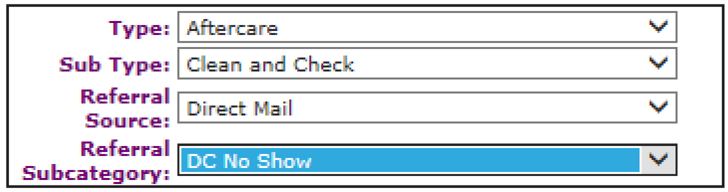
- A color code for each appointment type
- A defaulted amount of time for each Appointment Type *(if needed, this can be edited for a specific appointment type)*



To make these selections, go go the the Administration Module, then click **Appointment Types**. Add the l*ength of time* and select the *color* for each standard Appointment Type and Sub Type

Note: The Appointment Types/subtypes used by Miracle-Ear have been set up to function for Sycle reporting and to create a comprehensive customer experience. The selection of the appointment type does not affect the close rate calculation. The close rate calculation includes all appointment type outcomes.

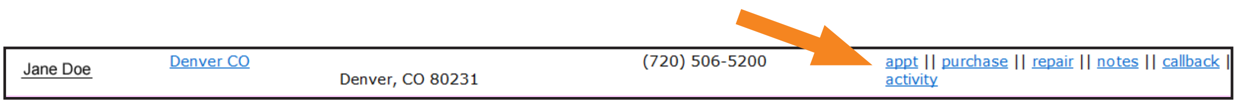
The next page will walk through the step by step process of entering an appointment on the schedule. The steps to find the Appointment Types and Subtypes on the schedule screen are as follows:



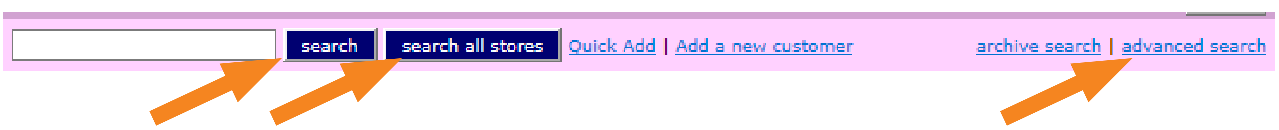
Note: If there is a change in the type of appointment for the patient, for example an Aftercare Clean and Check is now an Annual Retest, the Appointment Type can be edited in the Appointment Outcome screen. Click enter outcome and then click on edit to change the appointment type (prior to entering the outcome). For more details on this, refer to the LMS module Sycle Module 3 - Schedule Overview and Scheduling Appointments.

ENTERING AN APPOINTMENT ON THE SCHEDULE

1. On the appointment screen, search for the patient in the database search box
2. If the caller's name is in the database, click on the **appt** (appointment) link



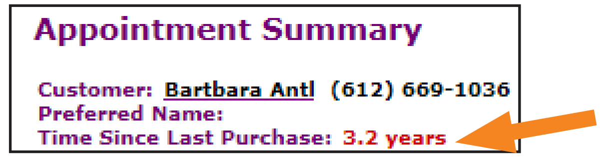
   a. If the name is not located, search again for *all locations* first, and then try *advanced search options.*



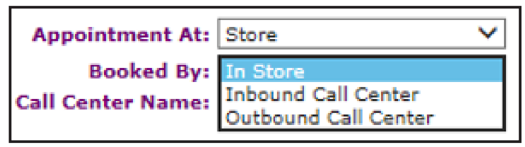
Advanced Search Options:

b. If the name is still not found, a new patient record should be created, then create an appointment before clicking the **appt** (appointment) link.

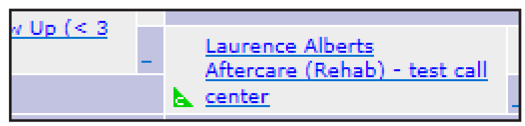
3. Click on the **date** and **time** for the appointment.
4. The *New Appointment* screen opens (image on page 23)
5. Fill out the required information in the New Appointment screen to schedule the appointment
6. Click **continue**.



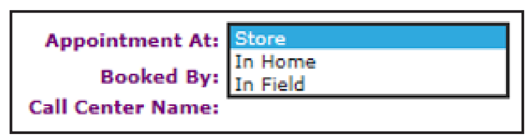
- The last hearing test date and the last purchase date appears in the top section to allow staff to consider this information when scheduling an appointment and the amount of time allowed.



- Enter the type of staff creating the appointment in the *booked by* field (In Store, Inbound Call Center, or Outbound Call Center). This field will default to the entry made in the Administration module. This can also be changed when an appointment is rescheduled.

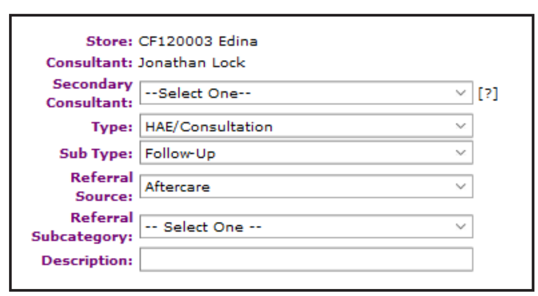


- If an inbound or outbound call center agent creates an appointment, the booked by information will be visible on the appointment on the schedule.
- The demographic information will auto populate from the intake information in the customer summary.



- The preferred location will auto populate from the customer summary, however, this can be changed when scheduling a new appointment. If the appointment will take place outside of the office, a reminder message will display on the appointment on the schedule.

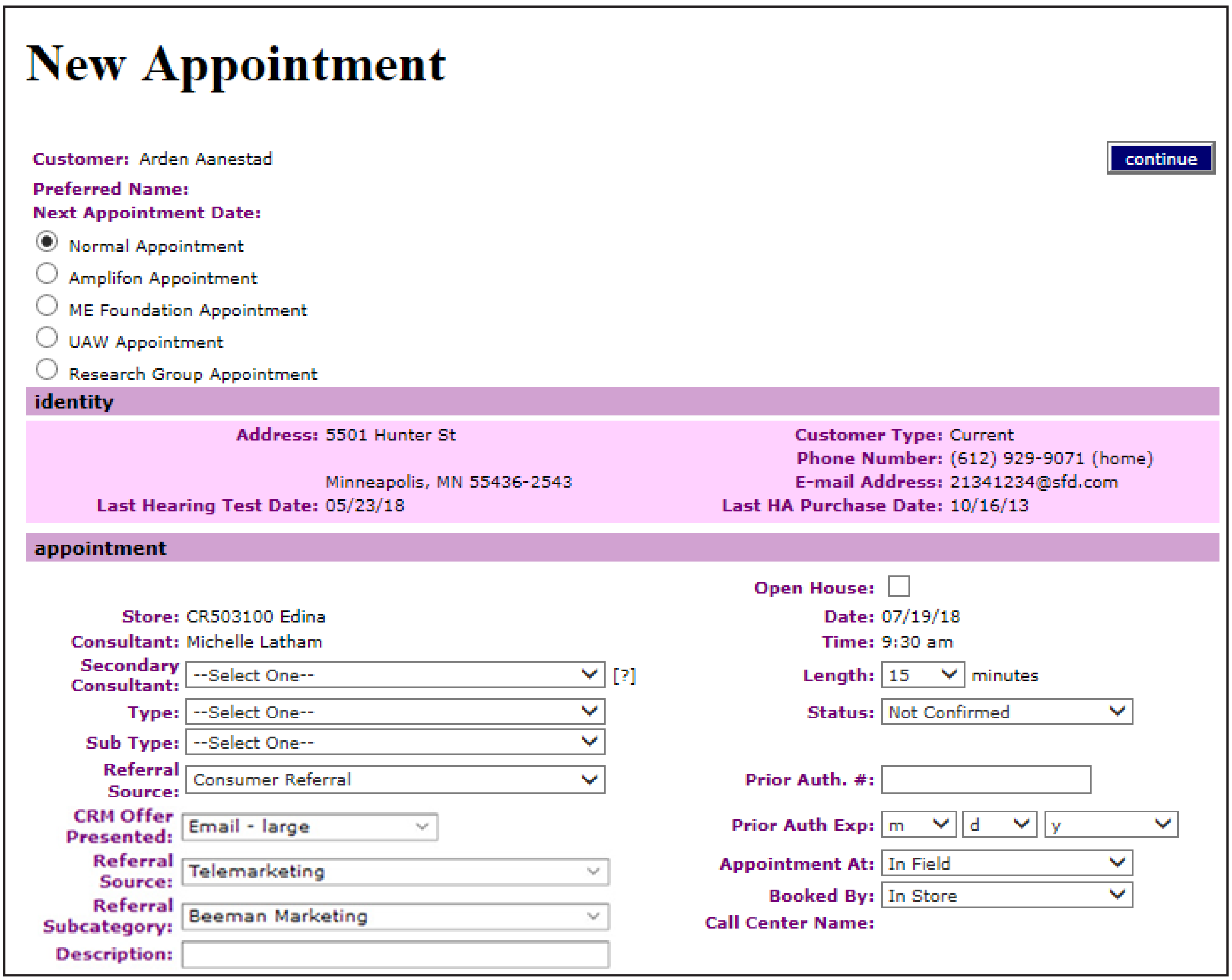
- If the email address in the patient's Customer Summary is invalid, a reminder message will appear when you try to save the new appointment. Additionally, if the email validation records from email hygiene have not been accepted or rejected from email hygiene, a reminder message will appear. Update the patient's email address in the Customer Summary or process email hygiene records to resolve the message.



- Appointment Types and Sub Types are required when creating an appointment. These fields describe the specific reason for the appointment.
- If the patient is responding to a specific CRM mailing, choose it from the CRM Offer Presented drop down list.
- The Referral Source is required. This tracks the marketing channel the patient responded to.

- The Referral Subcategory is also required. This describes the specific marketing promotion and offer the patient responded to.
- Select the CRM offer the caller is responding to in the drop-down, if applicable
- Notes should be entered to inform the Hearing Care Professional of any discussions with the caller. Always begin notes with the date and your initials.
  - **Example**: 1-5-16 PN Caller's wife encouraged him to call, he believes she just mumbles
  - **Example**: 1-4-16 PN turns TV up loud, caller is having difficulty hearing in noise
- After the notes have been saved, they will be visible when hovering over the appointment on the schedule. Additional information appears in the Notes pop up on the schedule, such as if they are an insurance patient and HealthiPlan approval information. A best practice is to also enter the type of insurance into the appointment notes to communicate this to the HCP.
- The companion selection is required. If yes, add the relationship and name. A companion should always be encouraged to attend the appointment.

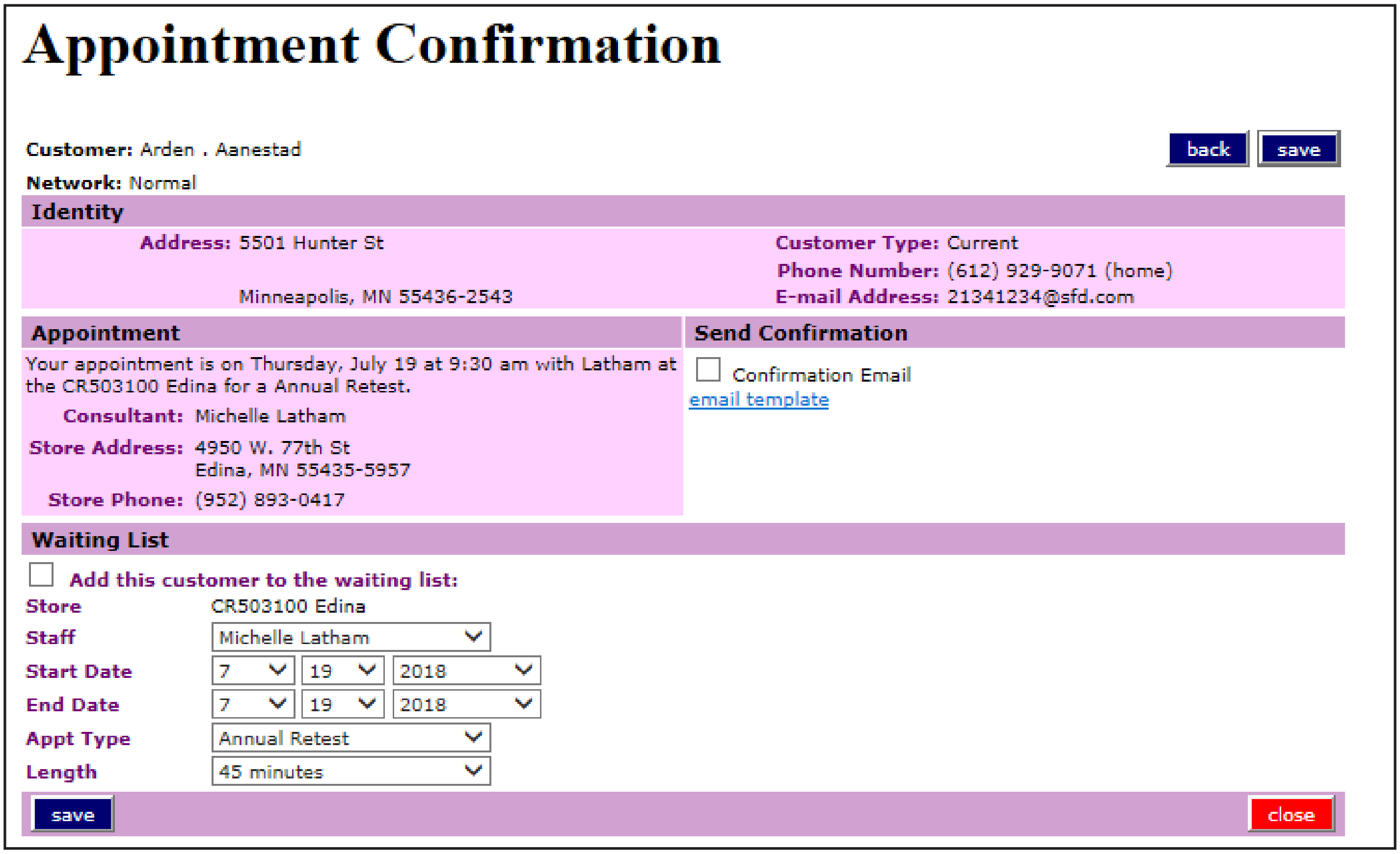
7. The *Appointment Confirmation* window opens (second image on next page). Verify the information, then click **save**.


New Appointment

Customer: Arden Aanestad
continue
Preferred Name:
Next Appointment Date:
Normal Appointment
Amplifon Appointment
ME Foundation Appointment
UAW Appointment
Research Group Appointment

identity
Address: 5501 Hunter St
Minneapolis, MN 55436-2543
Last Hearing Test Date: 05/23/18
Customer Type: Current
Phone Number: (612) 929-9071 (home)
E-mail Address: 21341234@sfd.com
Last HA Purchase Date: 10/16/13

appointment
Store: CR503100 Edina
Consultant: Michelle Latham
Secondary Consultant: --Select One-- [?]
Type: --Select One--
Sub Type: --Select One--
Referral Source: Consumer Referral
CRM Offer Presented: Email - large
Referral Source: Telemarketing
Referral Subcategory: Beeman Marketing
Description:
Open House:
Date: 07/19/18
Time: 9:30 am
Length: 15 minutes
Status: Not Confirmed
Prior Auth. #:
Prior Auth Exp: m d y
Appointment At: In Field
Booked By: In Store
Call Center Name:



ALTERNATIVE METHOD FOR ENTERING APPOINTMENTS

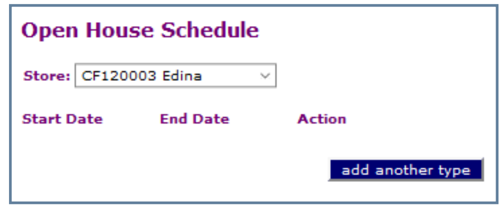
1. Click on the **appointment date and time** on the appointment screen calendar
2. The ***Search*** field opens to enter the customer name
3. Select the customer from the database list
4. The New Appointment Screen will open, and the information from the Customer Summary will auto-populate. Verify the information is complete and correct (i.e. capture email and cell phone number if not already captured),
5. Enter the required information to complete the appointment:
   a. The **demographic information** will auto populate
   b. **Email** information will auto populate if entered in the Customer Summary
   c. The **Appointment Type and Sub Type** is required
   d. The **Referral Source** is required
   e. The **Referral Subcategory** is required
   f. Add any **appointment notes** based on discussion with patient
   g. The **companion selection** is required. Add the companion's name and relationship if her or she will be attending.
6. The *Appointment Confirmation* screen opens. **Save**.
7. The *Appointment Calendar* screen opens. Verify that the correct appointment date and time appears on the schedule.

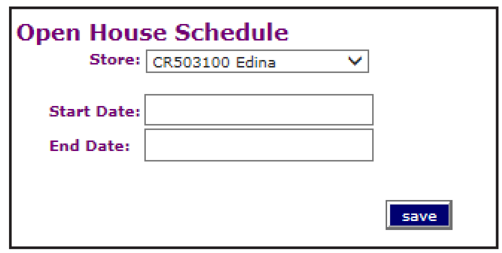
ENTERING AN OPEN HOUSE EVENT ON THE SCHEDULE

Open House events can be set up in the Administration module, which will then display a banner on the schedule to remind you that an Open House will be taking place on those days.

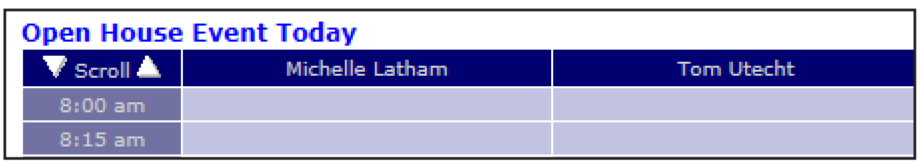
Admin Setup Steps

1. Go to the **Administration** Module
2. Scroll down to the **Open House** section, then click **Open House Schedule**
3. Click Add Another Type
4. Select the **Store** that will be having the Open House Event, then enter the **Start Date** and **End Date**
5. Click **Save**



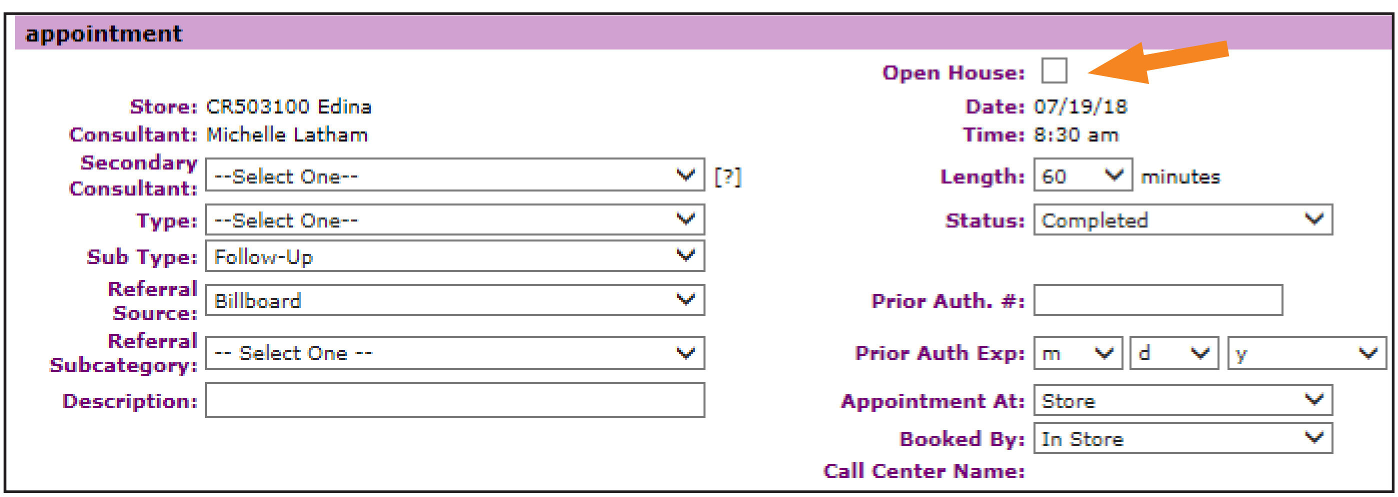


Now a notification banner will display on the schedule to remind staff that an Open House even will take place on this day so appointments can be strategically scheduled.



Scheduling an Open House Appointment

In the new appointment screen, there is a check box for an open house event to indicate that the appointment scheduled is part of the open house event. If there is a change in the appointment or event of the open house the check box can be edited once the appointment is saved.



The check box associates the appointment with an open house event for reporting purposes. The event details can be tracked in the following reports:

1. Appointment Detail
2. Hearing Aid Sales
3. Total Sales

See the Reporting section for further details.

DOWNLOAD

Offer/Demo	Product Offered	Total Price Offered	Objection Reason	Open House
Offer	MIRACLE EAR ME3100 RIC BTE BTE RITC	$1,500.00	Price Objection	Y

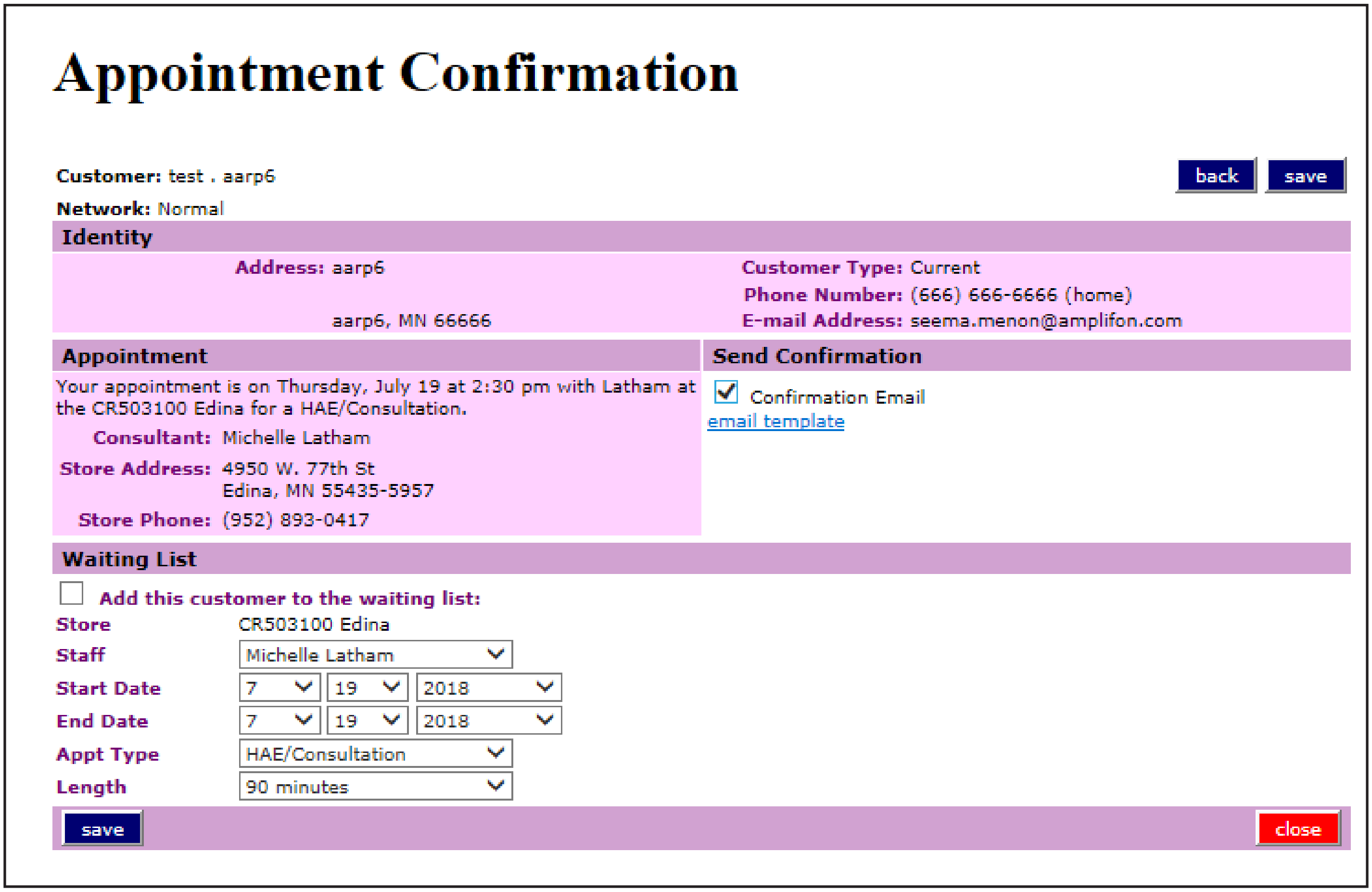
Appointment Confirmations

EMAIL CONFIRMATIONS

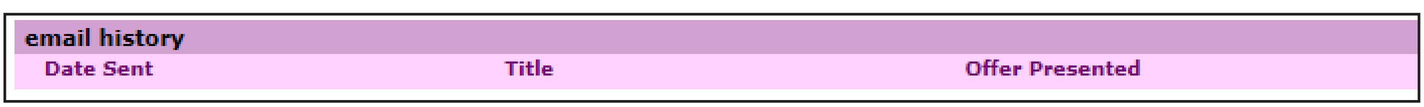
Email confirmations are sent for patient appointments if the following criteria are met:

1. The **store email** has been entered in the Administration module
2. The **patient's email** address is correctly entered in the Customer Summary.
3. The **OK to email** box is check in the privacy section of the Customer Summary.
4. The **email confirmation box** has been check in the *New Appointment screen* when setting the appointment.

Confirmation emails are sent to the email address entered in the Customer Summary.



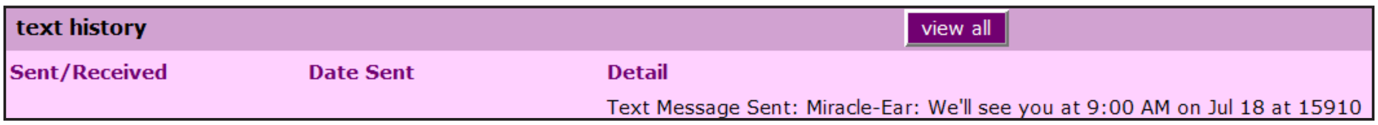
Accept or reject updates in email hygiene to ensure the patient's email address is correct. If the patient's email appears in the email hygiene update, but the update has not been processed, a message will appear in the Customer Summary and in the New Appointment screens. Correct the email address to resolve the message. Email confirmation history is found in the Customer Summary.



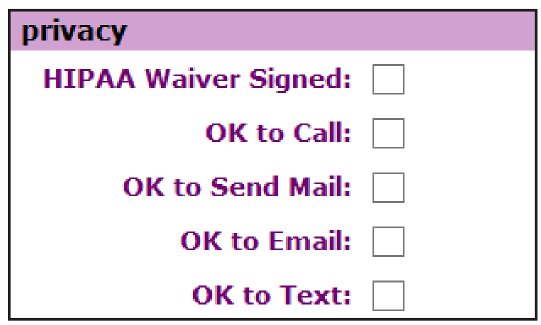
Note: check with your franchise owner for questions on the use of email confirmations.

TEXT MESSAGE CONFIRMATIONS

- A text will be sent two days prior to the appointment date scheduled if a cell phone has been entered into the Customer Summary. When collecting a phone number, confirm whether it is a landline or a cell phone and add the number to the appropriate field in the Customer Summary.
- The message arrives from # 667-46, and each message begins with a message from Miracle-Ear.
- The customer has the opportunity to reply and confirm the appointment. The customer will reply "C" to confirm his or her appointment.
- Sent text messages can be viewed in the Customer Summary or on the Carewire Dashboard (ask your franchise owner for Carewire instructions).



PRIVACY

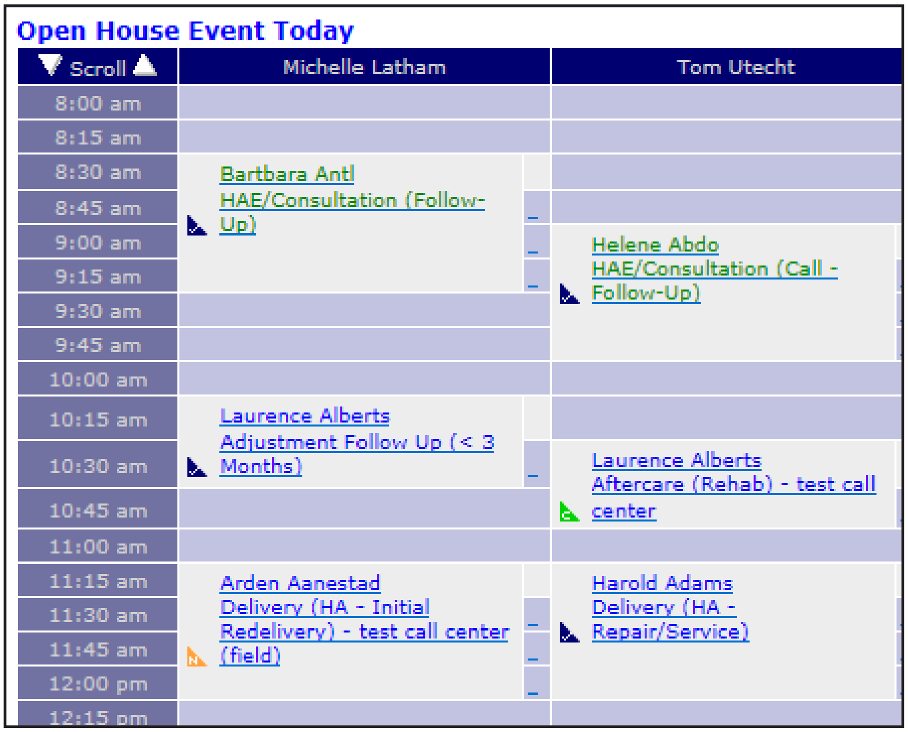


The privacy section displays the prerogative of the patient for communication channels to call, mail, email or text. A patient is automatically enabled to call, email, mail or text, but can be disabled by unchecking the box. Staff can also track if the HIPAA waiver has been signed. The following steps should be taken if a patient does not wish to receive confirmation texts or emails, uncheck the appropriate box in the privacy section:

1. Go to the *privacy* section in the patient's Customer Summary. Click **Quick Edit.**
2. Scroll down to the Privacy section.
3. Uncheck the box next to the type of confirmation to remove the customer from the program.

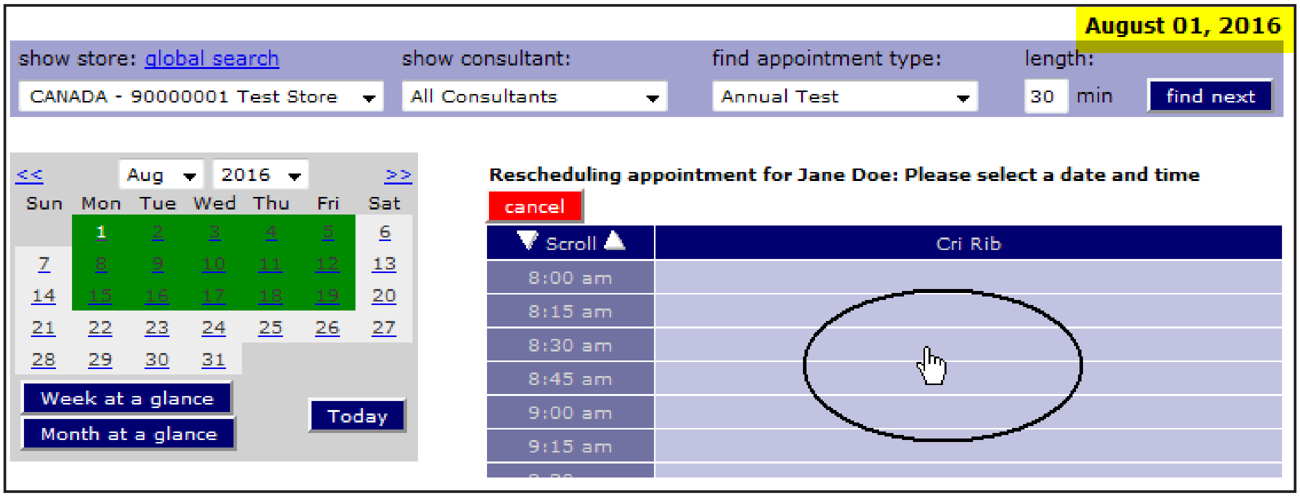
RESCHEDULING AN APPOINTMENT

1. Locate and click on the patient appointment that needs to be rescheduled



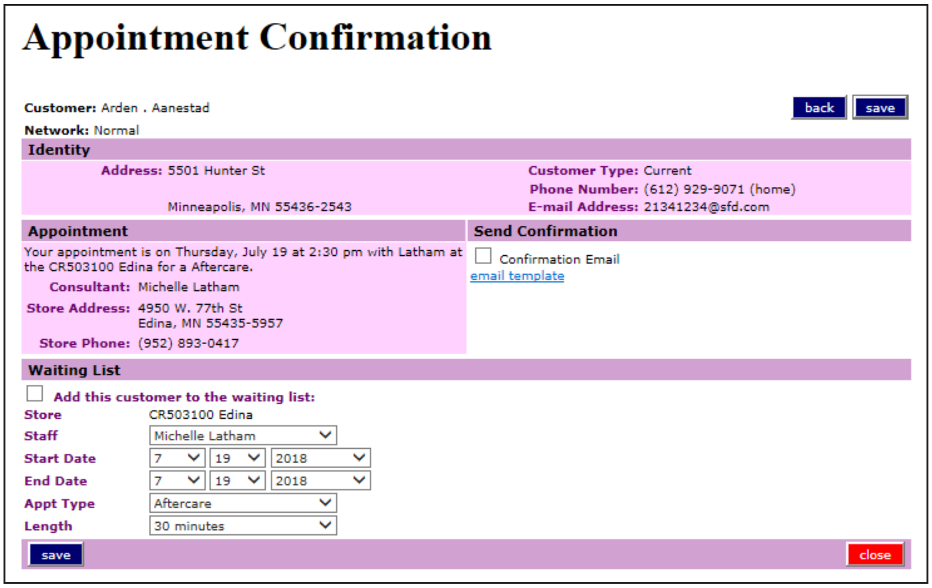
2. The Appointment Summary window opens. Choose the reason from the Call Initiator drop-down list, then click the **reschedule** button.

3. Sycle brings you back to the the Appointments screen to select a new date and time. Future dates are green in the calendar on the left of the screen. Click on the **new date**, then click the **new time**.

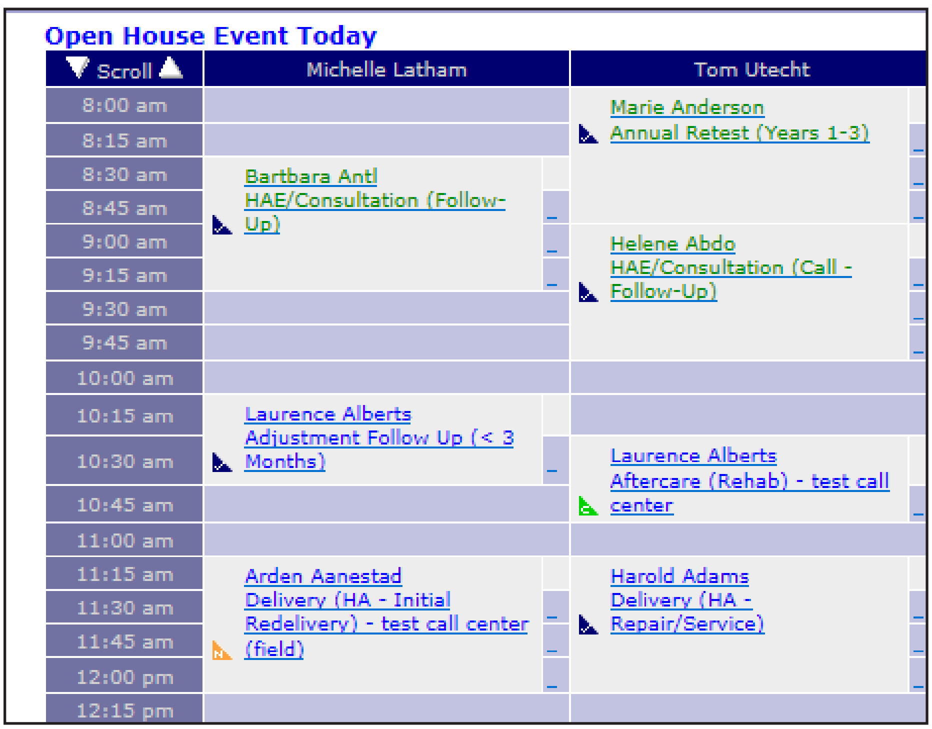


4. The ***New Appointment*** window opens. Verify the new date and time of the appointment, then click the **continue** button.

5. The Appointment Confirmation window opens. Verify the new date and time again, then click the **save** button.



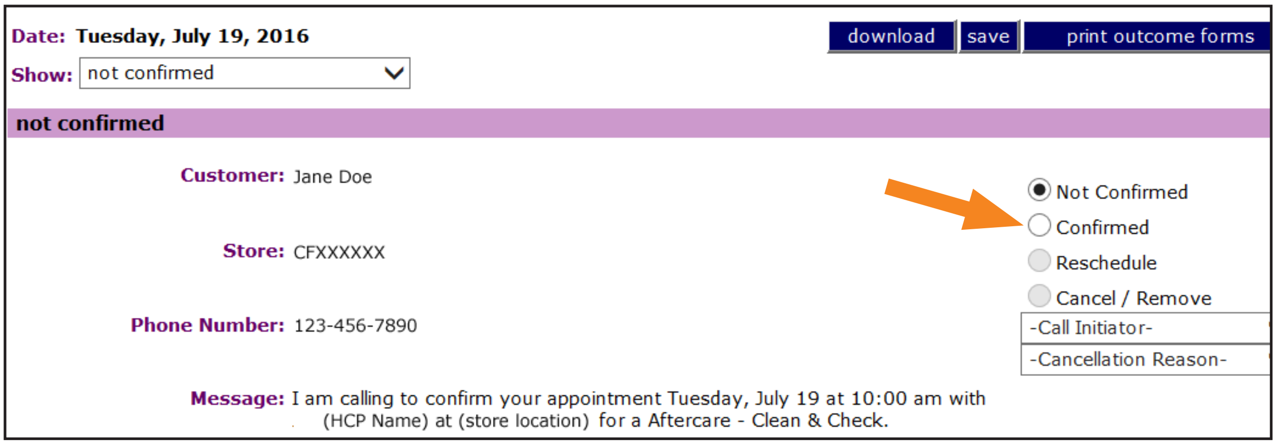
6. The new appointment now displays on the daily calendar.



Call List Confirmation Status

Once an appointment has been confirmed, the customer appointment status can be changed from *Not Confirmed* to *Confirmed* in the Call List on the appointment schedule.

1. Click on the **Call list** box. In the drop down select all appointments not confirmed.
2. Click on the **Confirmed** radio button after contact has been made with the customer to update the confirmation status.



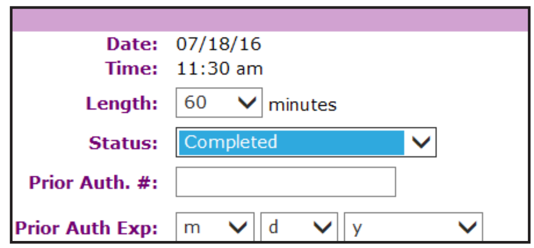
3. Click **Save and Close**.
4. The appointment confirmation icon on the schedule will change to green once confirmed. See icon definitions below:

Entering Appointment Outcomes

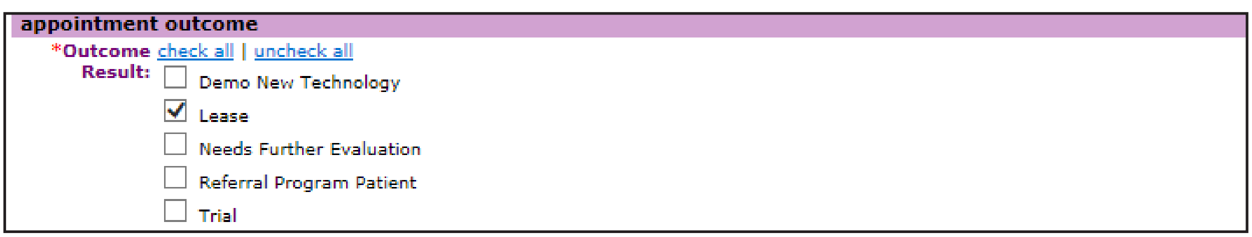
Appointment Outcome information feeds the Appointment Results Report and is crucial to tracking the results of the appointment. The outcome fields must be completed to create a Purchase Summary. Outcomes that are not completed also affect delivery of CRM mail.

Once an appointment has been completed, the ***Enter Outcome*** button will appear in the Appointment Summary.

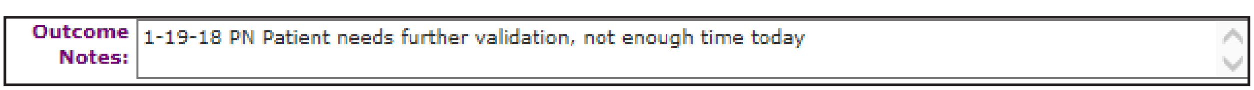
1. Click on the **patient's name** on the schedule. The Appointment Summary screen will appear.
2. Click the ***Enter Outcome*** button at the bottom of the screen.
   a. **Note:** If *Enter Outcome* button is not there, click **Edit** to update the outcome. The status will change to ***completed***.



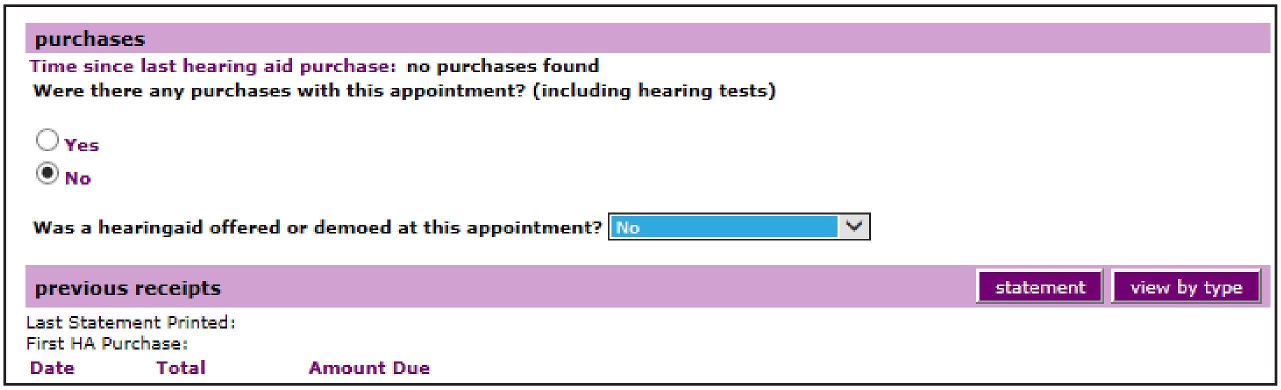
3. Enter the additional appointment results:
   - **Customer Demographics:** verify patient's address
   - **Referral Source:** verify and select the correct marketing source
   - **Referral Subcategory:** verify and select the correct promotion for the patient: this should be entered in the admin section for all current promotions as: code/creative/date/offer
   - **Appointment Companion:** verify whether the companion was present at the appointment, then choose Yes/No
   - **Outcome Results:** Select all applicable outcomes. Outcomes are updated based appointment types and subtypes. These selections allow tracking in the Appointment Results and Appointment Detail reports.



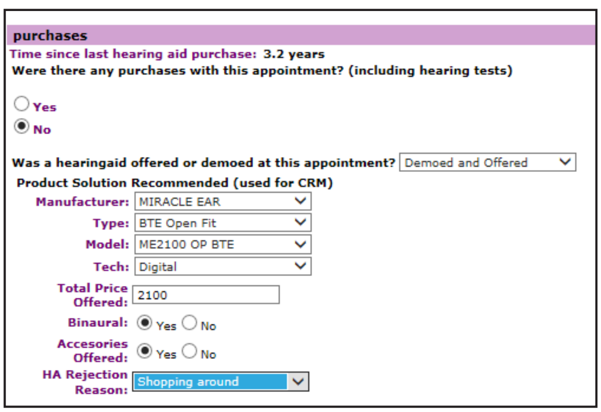
   - **Outcome Notes:** enter all additional outcomes in the notes section to document appointment results. Always enter the date and your initials when entering notes.

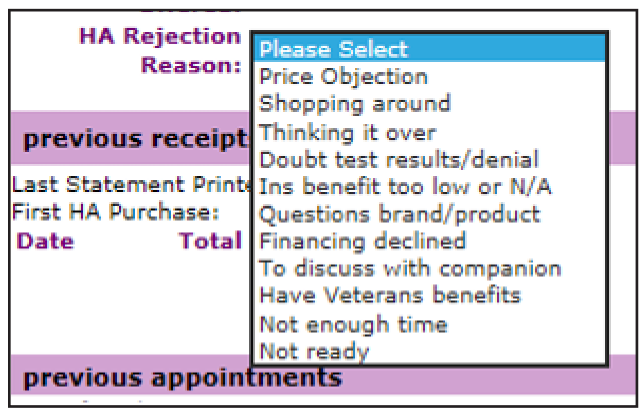


- **Price and Product Demoed and Offered:** select yes or no to indicate whether a purchase was made during this appointment. If *yes* is selected, no further questions will be asked. If *no* is selected, an additional question will be asked regarding whether product was offered and demoed. If *No* is selected, no further questions will be asked.



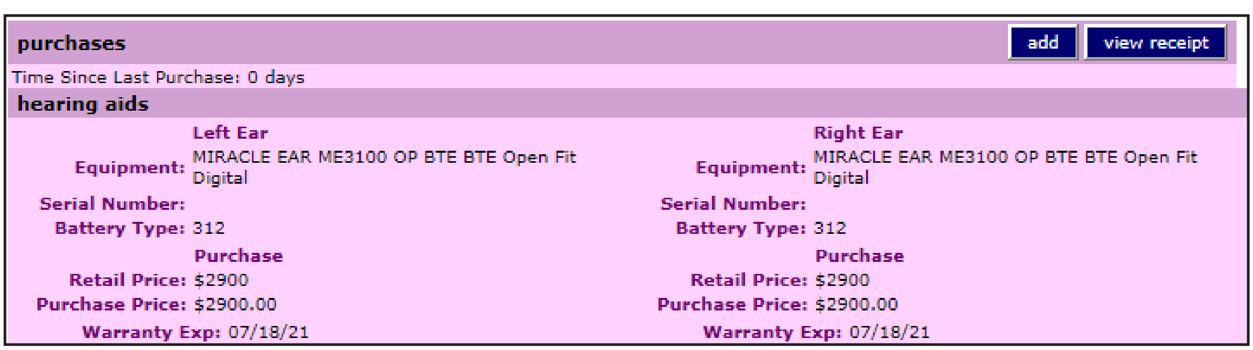
If a product was demoed or offered, enter the model, solution, if binaural was recommended, price offered, accessories offered, and the HA rejection reason (the reason the patient did not purchase hearing aids.) If more than one reason is applicable, choose the main one.



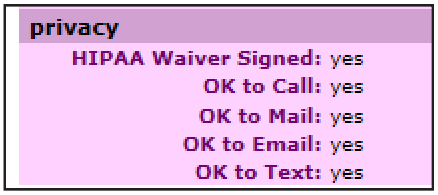


This information will be saved in the Customer Summary and the Appointment Summary.

Note: The purchase can be added from the Appointment Summary screen, unless another appointment is created to discuss the purchase. Enter the purchase from the appointment that generated the sale. The product offered or demoed will populate. If any changes are made, edit them on the Hearing Aid Purchase screen and make sure to check if the quantity (left or right) is correct. Ensure the correct purchase date is entered.



- **Custom Results:** enter any additional criteria to track as directed by the franchise owner
- **Test results (*required*):** results can be manually entered or uploaded from NOAH by clicking **Refresh** button in the Appointment Outcomes section
- **Privacy:** privacy information (OK to call, text, email, or mail) from the Customer Summary is displayed in the Appointment Outcome. Any changes or edits are made in the Customer Summary. If deceased records from Data Hygiene are not processed after 10 days, these boxes will be automatically unchecked (set to "no")



- **FDA questions:** verify that FDA questions have been asked within the current year as per the Miracle-Ear Experience clinical protocol
- **Callback:** enter a reminder for staff to call the patient and enter any reminder notes
- **Recall:** enter a series or recurrence of callback dates for patients
- **Custom Group:** verify if the patient belongs to a marketing group, service center, club or organization that is tracked in Sycle (set up by franchise owner)
- **Purchase:** If there was a purchase made on this appointment, click **Yes** to link to a Purchase Summary
- **Receipts:** Verify whether the patient needs a receipt or billing statement. If so, click on the invoice number to go to the Purchase Summary. Click **billing statement** if needed.
- **Previous appointment:** view the history of previous appointments

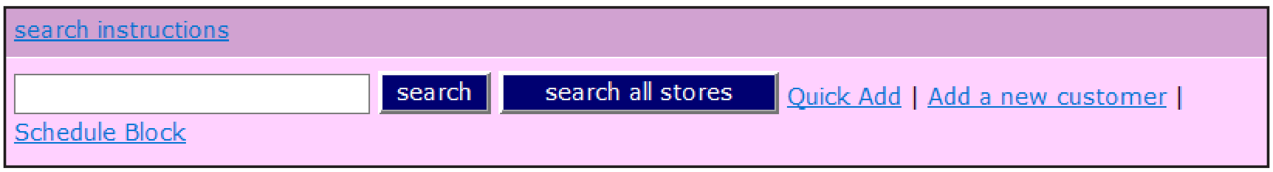
4. **Save**

Using a Schedule Block

A schedule block is used when a time needs to be blocked off on the schedule, for example, vacation time or a meeting. This will remind staff not to schedule an appointment during the time period. When a schedule block is created, it will appear in all locations in which the Hearing Care Professional sees patients.

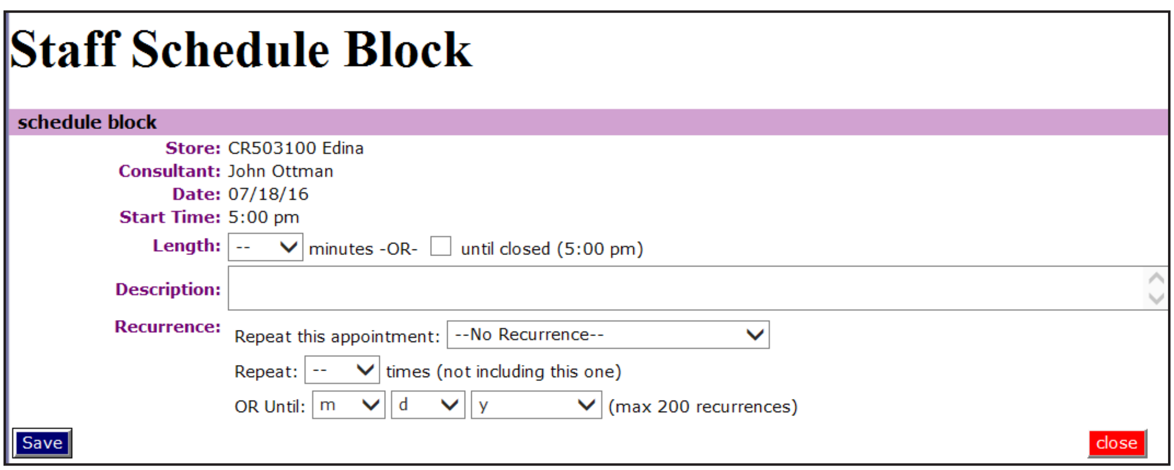
Note: the locations associated with a HCP are selected in the staff profile in the administration module

1. To create a Schedule Block on the calendar, click on the **day/time** the block should begin.
2. The *Search* screen opens. Below the search box the, click the ***Schedule Block*** link.
3. The *Staff Schedule Block* screen appears (shown below). Enter the **length of time** needed for the block.
4. Add a **description** to appear on the calendar (***Ex.*** *12:00-1:00 Lunch*)
5. Indicate whether a reoccurence is needed



   a. Use the ***Repeat this appointment*** drop-down list to indicate how often the block should recur
   b. Use the ***Repeat*** drop down to indicate the number of times it should repeat, or use the ***Until*** drop downs to indicate the final date of the recurrence.

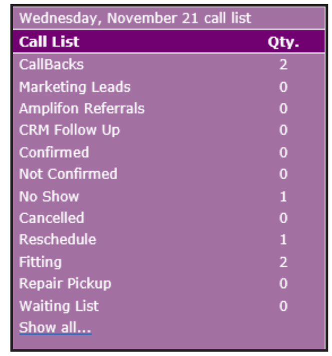
6. Click **Save**



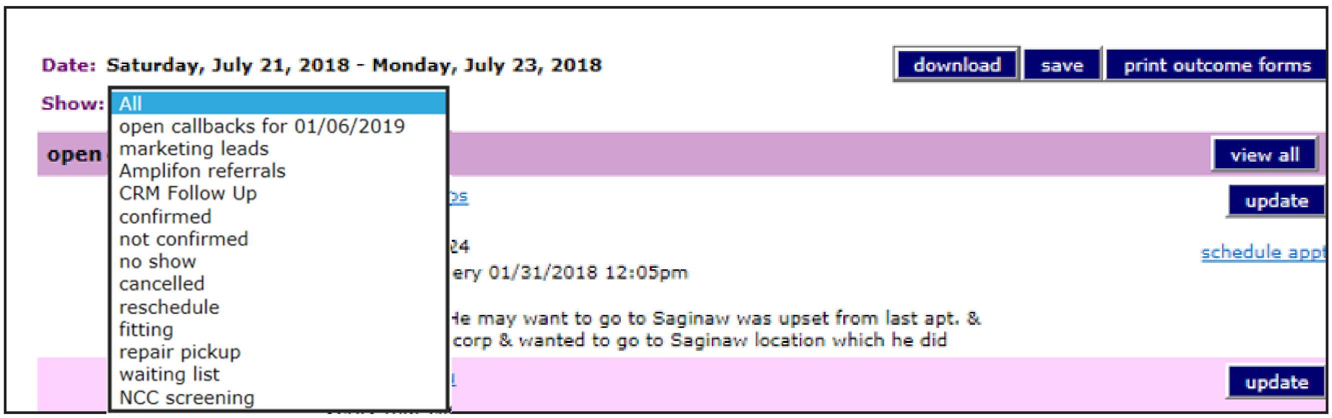
To unblock: click on the **schedule block** in the Calendar and click **Cancel**. The block will be removed from the schedule.

Note: Schedule blocks will restrict a patient's ability to book an appointment online during the blocked time on the schedule. Schedule blocks should only be used to indicate when your Hearing Care Professional is unavailable to take an appointment.

Using the Call List



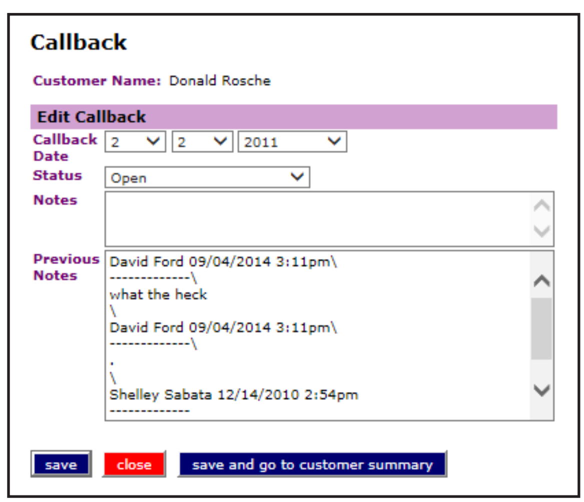
1. From the ***Appointment*** screen, click the purple **Call List** box *(shown at right)*
2. The selection of patient lists to call can be found in the in the **Show** drop down menu *(shown below)*
   a. **Download /Save / print outcome form:** on the top right of the screen you can download the list in excel, save it to your computer or print the outcome forms. If the FOA is responsible for entering appointment outcomes, the Outcome Form can be printed to give to the HCP, so the HCP can indicate what information should be added to Sycle.
   When the print outcome form button is clicked, the outcome forms for the following day will populate.



TYPES OF CALL LISTS

The list below provides a description of the patient lists to follow up on:

- **Open callbacks:** lists all patients that have a callback created for the day and those that have not been completed in the past. Once contacted, click on the **update** button, then select **complete** to finish the callback status.
- **Marketing leads:** lists all callers from marketing channels, such as your local website and National TV. If a caller does not reach your office directly, they will appear in this call list. Information about the caller, such as name and phone number will be captured if available (ex. the name may not populate if a cell phone is used, or if the caller uses a landline other than their home phone). This call list is upated hourly, and call times are displayed in Eastern Standard Time (EST). If you are unable to reach the caller after three attempts, mark the lead completed (click **update**, then select **Complete** to update the lead's status), then create a callback for a future date.



- **Amplifon Hearing Health Referrals:** lists all patients from Amplifon Hearing Healthcare

- **Website Appointments:** lists all patients who have booked an appointment online. Reach out to each patient with a confirmation call to confirm you have received their appointment on the schedule.
- **CRM Follow Up:** lists all patients who have been mailed CRM letters to allow quick and easy access for staff to make follow-up calls on the CRM mailings
- **Confirmed:** lists all patient appointments that have been confirmed for the following day on the schedule. The appointment will have the green icon when confirmed. Click the **view** button to check the appointment summary details.
- **Not confirmed:** lists all patient appointments that have not been confirmed for the following day on the schedule.
- **No show:** lists all patients that did not show on the schedule from prior appointments.
- **Cancelled:** lists all patient appointment that have been cancelled as a reminder to reschedule the appointment
- **Fitting:** lists all patients to schedule the fitting(Delivery) appointment for the delivery of their hearing aids
- **Reschedule:** lists all patient appointments that have a reschedule status but have not rescheduled
- **Repair pick up:** lists all patients to schedule for a delivery of their repaired hearing aids (Re Delivery)
- **Waiting list:** lists all patients entered to the waiting list to schedule an appointment
- **NCC screening:** N/A

The Call list can be used as a tool to update the status of an appointment in sycle. There is a colored icon next to the patient appointment indicating the status.

Call List Best Practices

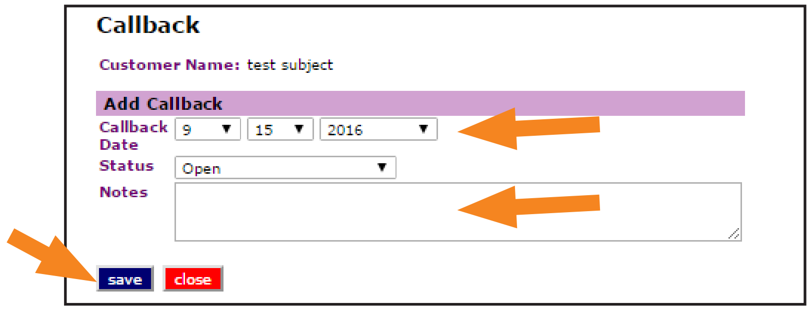
- Attempt to reach each call list lead three times before marking the callback complete
- If you are unable to reach the patient after three attempts, mark the callist entry complete, then create a new callback for a future date. Instructions for creating callbacks can be found on the following page.

ENTERING A CALL BACK

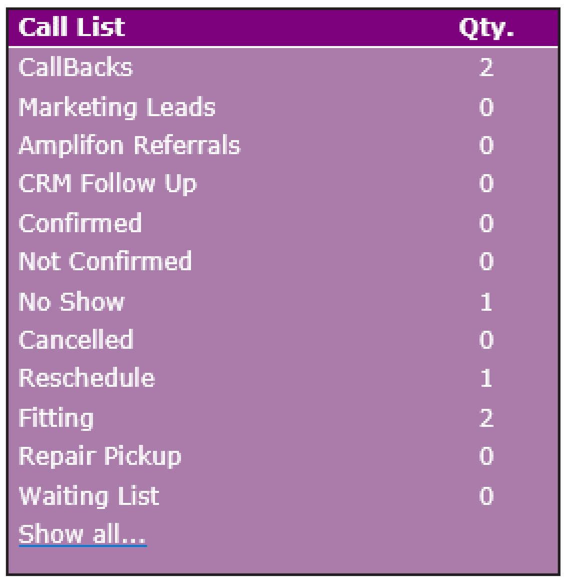
From the Appointment screen, use the search box to find the **patient's name**

Click the **callback** link

Choose the **Callback date** and any **Notes** to remind yourself of when making the callback, then click **save**



The Callback will appear in the Call List on the chosen date.

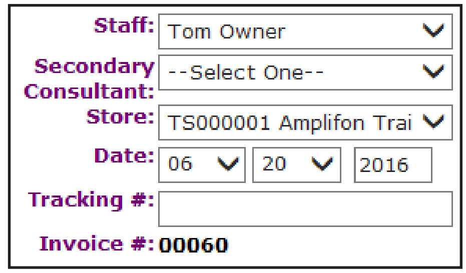


Entering a Non-Hearing Aid Purchase

To create a purchase such as an accessory or battery sale:

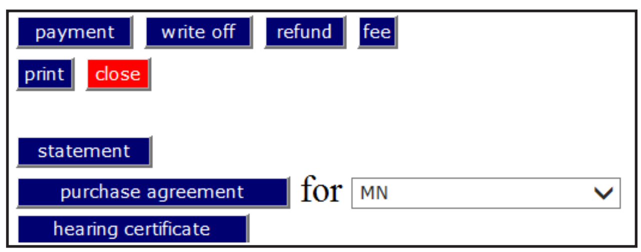
1. Search for the **patient name.** Click the **purchase button** across from the patient's name.
2. The ***Purchase Summary*** displays. Customer information which has been added to the database will display in the Purchase Summary.
3. Below the customer demographic information, the type of sale to be entered defaults to a Normal sale. Most sales are marked as a Normal sale, unless it is for the Miracle-Ear Foundation or Amplifon Hearing Health Care referrals. Click the **radio button** to select the correct **type of sale.**

4. Select the correct **staff** and **store location:**
   a. The right corner indicates the staff name and store information, be sure to select the correct staff and store name on the Purchase Summary
   b. The date is listed under the staff and store name
   c. The tracking number is not used in Sycle
   d. Sycle automatically creates an invoice number for each purchase



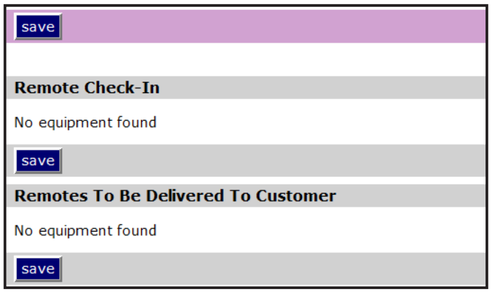
5. Add the type of product purchased by clicking the add button.
   Note: Make sure you enter the size and type of product.

6. Add the **type of payment:**
   a. **Payment:** This button is used to record the payment from the customer.
   b. **Write off:** This button is used to remove (write off) a portion of the total amount in the Purchase Summary. ***Check with your franchise owner prior to using this button as it will affect accounting records.***



   c. **Refund:** This button is used to enter an amount to be refunded to the customer on the Purchase Summary. A refund could be owed to the customer for hearing aids or accessories.
   d. **Fee:** This button is used to add a restocking fee for a hearing aid return on the Purchase Summary.
   e. **Close:** This button is used to close the purchase summary to go to another screen
   f. **Statement:** This button is used to create and print a statement for the customer. Check with your franchise owner about policies for printing statements.
7. **Save** the payment information.

8. Some accessory items are tracked in the inventory section and will be received to track the status.
9. Click on the **Inventory Section** in the Appointment Screen. The following steps will differ depending on whether or not AP/PO Sycle is enabled for your franchise.
   a. **Non AP/PO Sycle:** Go to the item Check-in (the example below is for a Remote Check-In)

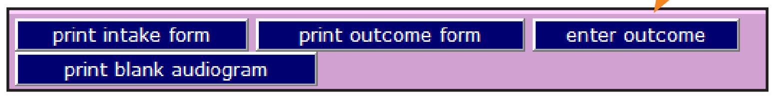


   b. **AP/PO Sycle:**
      i. Select **Purchase Orders Submitted** from the drop-down menu
      ii. Click on the **Purchase Order** for the customer.
      iii. Click on the **Receive** button
      iv. Once the customer completes the Delivery appointment, click on the **Inventory Section** in the *Appointment* screen:
      v. Select the **Item to be Delivered to Customer** from the drop-down menu
      vi. Check the box for the **Delivered to Client** (warranty end date does not apply)

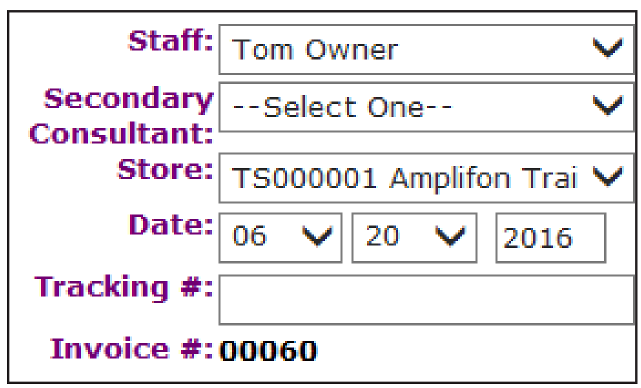
For more information, review the LMS module
Sycle.net Module 6-Returning and Exchanging Hearing Aids and Other Products

Entering a Hearing Aid Purchase

1. To create a hearing aid purchase, an appointment must be created.
2. Go to the **date of the purchase** in the *Appointment Module* and find the **purchased date appointment** or **create a new appointment.**
3. If the outcome has already been entered, click **edit** to finish the purchase in the outcome. (See *page 21* for steps to enter an appointment outcome if this has not already been done.)
4. Click the **enter outcome** button. (shown at right)



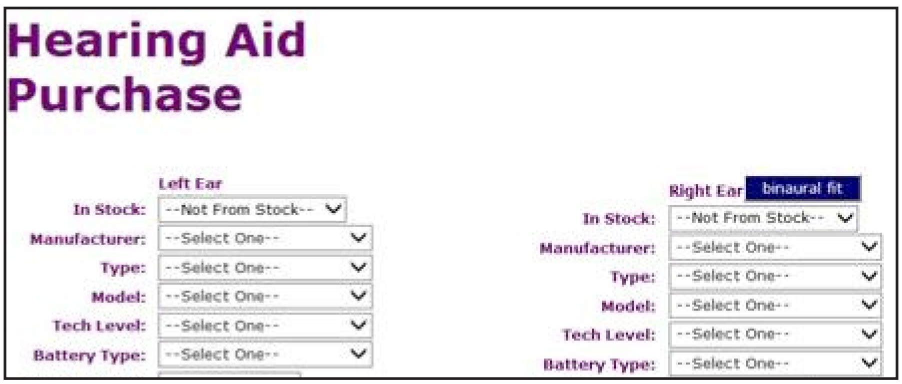
   - Enter the outcome of the appointment to create a hearing aid purchase.
   - The appointment outcome stores important information to track the status of each appointment scheduled, which feeds into several reports.
   - Incomplete outcomes affect the delivery of CRM pieces.
   - The outcome fields must be completed in order to create a Purchase Summary for a hearing aid.
   - Once you have clicked Enter Outcome, complete the following steps to enter the sale. For detailed information regarding appointment outcomes, see page 33.
5. The *Purchase Summary* will open.
6. Select the correct type of sale below the customer demographic information. This will default to a *Normal* sale.
7. Select the correct **staff** and **store location.**



8. The ***Secondary Consultant*** field was created to track results for Open House events with the Hearing Education Managers (aka: Open House Closers). This field can also be used for any temporary Hearing Care Professional to assist in tracking the results of the temporary consultant during an event. Miracle-Ear Hearing Education Managers have been uploaded into the secondary consultant field, and additional secondary consultants can be added in the *Administration* module.
   a. To add a new secondary consultant; scroll down to the bottom of the *Administration* module and click on **create a new staff member.** Select **Secondary Consultant** under the *Privileges* section.

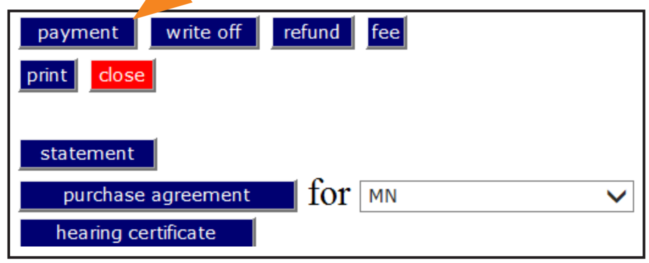
9. Click on the **Add** button next to Hearing Aids to open the Purchase Summary.

10. To create a Purchase Summary for hearing aids to be ordered from the manufacturer or sold from stock inventory, follow these steps:
    a. If the hearing aids are in stock, use the ***In Stock*** drop-down menu select the **Serial Number** for the ***Left Ear*** and the ***Right Ear***
        i. The data for ***Manufacturer, Model, and Battery Type*** should auto populate if it has been entered in the Admin section
        ii. **Note:** the *binaural fit* button should be used only if the hearing aids are ordered from the manufacturer, not for ordering from stock
11. If the hearing aid is not in stock, select the **Manufacturer, Model, and Battery Type** for the hearing aid in the drop-down on the left side. Click the **binaural fit** button if two identical aids are sold and the information will auto populate for the right side.

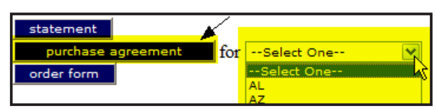


12. If a discount was given, click on **Add Discount.**
13. Select the **type of discount** given (**ex.** *manager's approval*)
14. Once you select the type of discount:
    a. You will be able to enter the **price the patient paid** in the *selling price* box. The discounted amount will auto populate in the *discount* field.
    b. If the type of discount has been set up in the administration module, it will auto fill the $ amount or % amount for the discount, subtract the discounted amount, and populate the selling price.
    c. For Help with discount rate admin set up call the Computer Services team.
15. Click the **Product Options** button to add any options sold. The selections to choose for product options are added in the Administration module.

16. Add any **options** prior to saving the hearing aid. The available options are:
    - **Product *Features*** are options that come standard with the Hearing Aid. These *Feature* options should be automatically added whenever the hearing aid item is added to a Purchase Summary.
    - **Product *Specifications*** are similar to Product Features in that they are included in the price of the hearing aid, and are not separately received, inventoried or matched.
    - ***Stand Alone* Options** include Remotes and Wireless devices that can be separately ordered and inventoried.
    - ***Sold with Hearing Aid* Options** include Optional Accessories or Optional HA upgrades that are sold with a hearing aid.
17. **Save**. The page will link back to the purchase summary screen
18. Click on the **payment** button (shown at right)

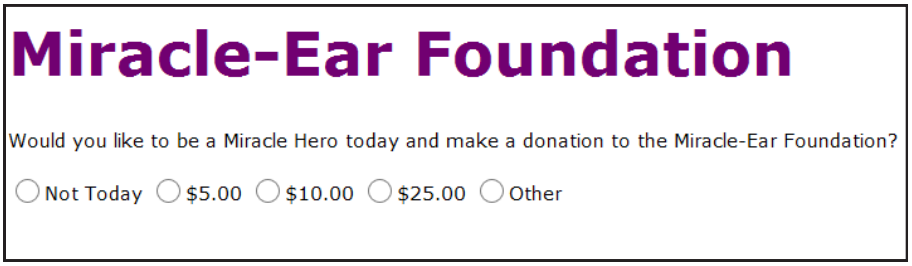


19. Add the type of payment:
    - **Payment:** This button is used to record the payment from the customer.
    - **Write off:** This button is used to remove (write off) a portion of the total amount or balance due in the Purchase Summary. ***Check with your franchise owner prior to using this button as it will affect accounting records.***
    - **Refund:** This button is used to enter an amount to be refunded to the customer on to the Purchase Summary. A refund amount would be generated if money is owed to the customer for hearing aids or accessories. An example would be a return of product.
    - **Fee:** This button is used to add a restocking or service fee. For example a hearing aid return on the Purchase Summary.
    - **Close:** This button is used to close the purchase summary to go to another screen
    - **Statement:** This button is used to create and print a statement for the customer. Check with your franchise owner about policies for printing statements.
    - **Purchase Agreement:** If the state legal language has been provided to Sycle by the franchise owner. A purchase agreement can be printed for the customer signature.



    - **Hearing Certificate:** The Lifetime Hearing Care Promise Program form can be printed from the Purchase Summary to help educate the patient about our commitment and the benefits of our aftercare program. It also explains the expectations we have of our patients to keep them engaged in their hearing health.

20. Select the amount of Miracle-Ear Foundation donation amount on the top left of the screen. If an amount is not selected, a pop-up reminder opens asking for a donation to the foundation. Enter the amount the customer selected or click other for a different amount. You can also select ***not today*** if the customer declines.



- The Miracle-Ear Foundation donation will automatically populate as a separate line item. The payment can be entered as a separate amount or combined with a hearing aid purchase payment.
- **Best Practice:** If the customer makes a payment that is combined with another purchase, add the sum prior to taking the payment type. For example, if the payment for the foundation is not added as an additional amount, the donation may be included in the financed portion of the balance. Using the example, a Miracle-Ear Foundation donation is $25.00 and a deposit for a hearing aid is $1000 the total collected from the customer would be $1025.00.
- ***Consult with your franchise owner for the desired Miracle-Ear Foundation process.***

13. **Save** again.

RECEIVING A HEARING AID FROM THE MANUFACTURER

1. When the new hearing aid arrives from manufacturer, receive it into inventory.
2. Click on the purple Inventory section on the Appointments Screen. The inventory screen will open.
3. In the drop-down menu select **Non AP/PO Sycle** or **AP/PO Sycle**
   a. In ***Non AP/PO Sycle:***
      i. Go to **Hearing Aid Check-In**
      ii. Enter the **serial number** and **invoice number** from the packing slip
   b. In ***AP/PO Sycle***:
      i. Click on **Purchase Orders Submitted**
      ii. Click on the **Purchase Order** for the customer
      iii. Click on the **Receive** button
      iv. Enter the **serial number** and **invoice number** for the order from the packing slip
   c. Click **save**.

COMPLETING THE DELIVERY APPOINTMENT

The following steps are the same in both AP/PO and Non AP/PO Sycle.

1. Click on the purple **Inventory** section in the *Appointment* screen
2. Select **Items to be Delivered to Customer** in the drop-down menu
3. Check the box for the **Delivered to Client**
4. Enter the **Warranty End Date**
   Note: enter the correct year the warranty ends

PREPARING FOR A HEARING AID EXCHANGE (MODEL CHANGE)

To complete the hearing aid delivery:

1. Click in the purple **inventory** section in the *Appointment* screen
2. Select **Items to be Delivered to Customer** in the drop-down menu
3. Check the box fo **Delivered to Client**
4. Enter the **Warranty End Date** (**Note**: enter the correct year the warranty ends)

Before entering the exchange, verify the following:

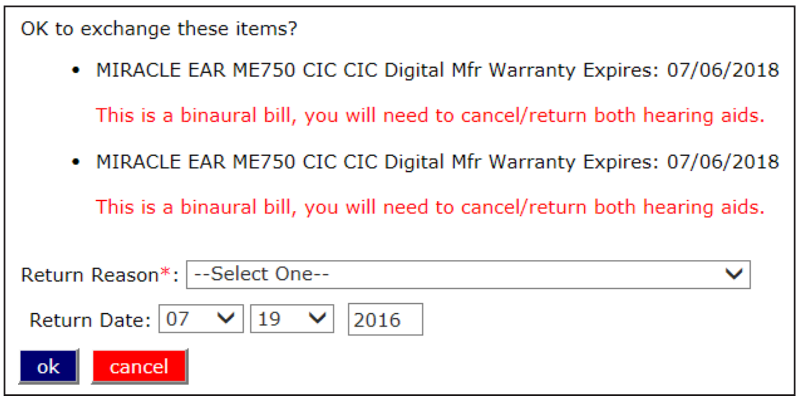
- Use **Internet Explorer** as your browser to enter the Exchange.
- Make note of the **model** and **price** for the **new product** sold to be prepared to make the exchange.
- If a Purchase Summary for the hearing aids you are exchanging has not been entered in Sycle, the exchange button will not be visible. (Verify the reason an invoice was not entered)

To recreate the original invoice:

1. Go to the **original appointment date** on the schedule.
   a. If the appointment is not on the schedule, create an appointment and enter the outcome.
2. Create the purchase summary in Sycle.
3. Return to the Customer Summary and scroll down to the Current Equipment section. The exchange button now appears.

STEPS TO CREATE A HEARING AID EXCHANGE (MODEL CHANGE)

1. Search for the **patient** in the Appointment screen
2. Click on the **patient's** name from the list
3. The ***Customer Summary*** screen opens
4. Go to the Customer Summary. Scroll down to the ***Current Equipment*** section (shown below) and click the **exchange** button for the correct hearing aid or click on the **exchange both** button to process an exchange of a binaural hearing aids.
5. The screen will ask to verify the aids to be exchanged. See the **OK to exchange these items?** prompt in the top left corner as shown below.

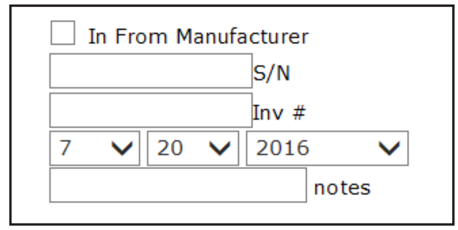


6. Once you have verified the items to be exchanged, click the **ok** button
7. The ***Purchase Summary*** opens
8. Enter the information for the **new hearing aid**
9. Click **save**
10. The ***Purchase Summary*** opens again, showing the old hearing aid above and the new hearing aids listed below
11. If there is a ***price variance***, it will populate at the bottom of the screen. Verify that the variance is correct on the Purchase Summary prior to collecting the amount from the patient.
12. Take **payment** or **refund** money as needed
13. Click save

Suggestion: Check the **Hearing Aid Sales** report to make sure the exchange shows up in the report.

RECEIVING A HEARING AID FROM THE MANUFACTURER

1. When the new hearing aid arrives from manufacturer, receive it into inventory.
2. Click on the purple Inventory section on the Appointments Screen. The inventory screen will open.
3. In the drop-down menu select **Non AP/PO Sycle** or **AP/PO Sycle**
    a. In ***Non AP/PO Sycle:***
        i. Go to **Hearing Aid Check-In**
        ii. Locate the **customer name**
        iii. Enter the **serial number** and **invoice number** from the packing slip



    b. In ***AP/PO Sycle***:
        i. Click on **Purchase Orders Submitted**
        ii. Click on the **Purchase Order** for the customer
        iii. Click on the **Receive** button
        iv. Enter the **serial number** and **invoice number** for the order from the packing slip
    c. Click **save**.

COMPLETING THE DELIVERY APPOINTMENT

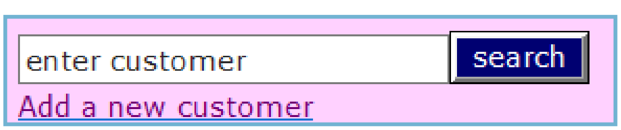
The following steps are the same in both AP/PO and Non AP/PO Sycle.

1. Click on the purple **Inventory** section in the *Appointment* screen
2. Select **Items to be Delivered to Customer** in the drop-down menu
3. Check the box for the **Delivered to Client**
4. Enter the **Warranty End Date**
   Note: enter the correct year the warranty ends

CANCELLATION OF A PURCHASE SUMMARY IN SYCLE

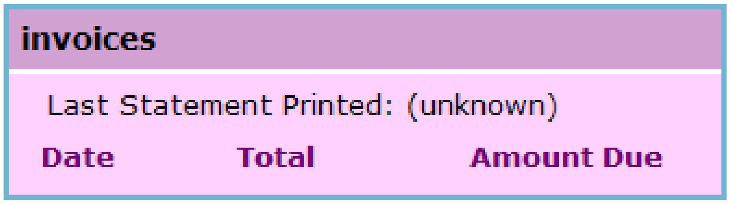
If a hearing aid **has not been delivered** to a patient in Sycle and you would like to cancel the purchase in Sycle please follow these steps:

1. Search for the patient name in the search box on the Appointment screen

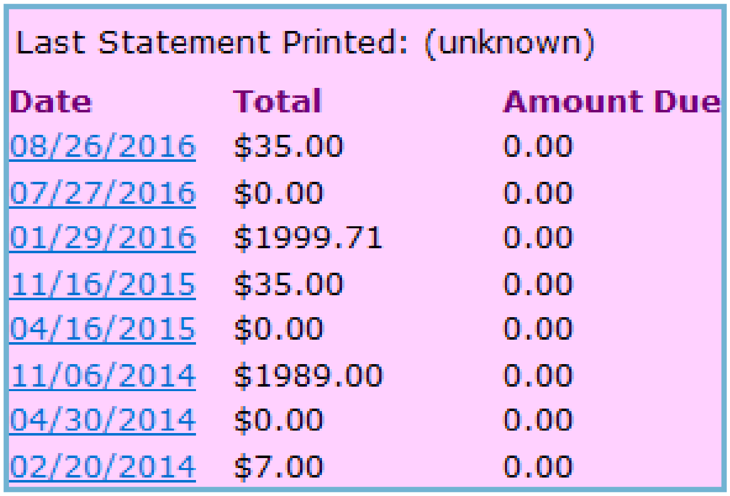


2. Click on the patient's name in the search results list to open the Customer Summary

3. Scroll down to the **invoices** section

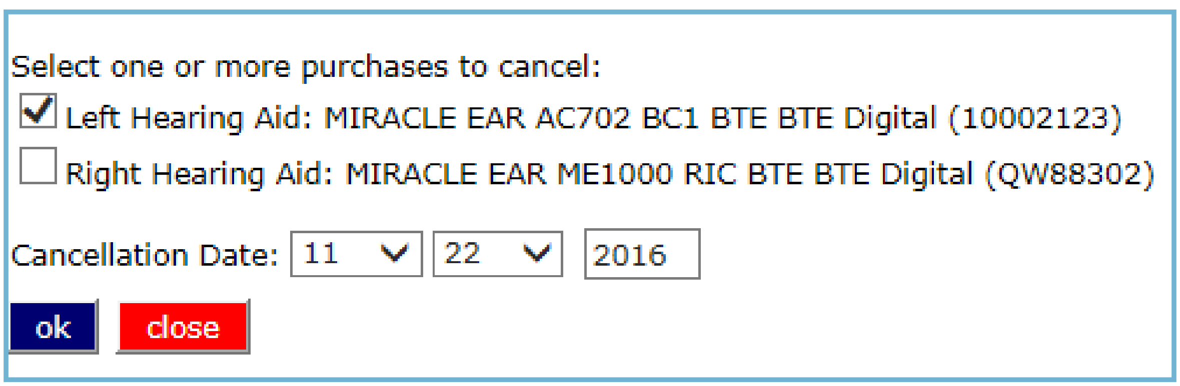


4. Click on the **Date** of the invoice number to open the Purchase Summary

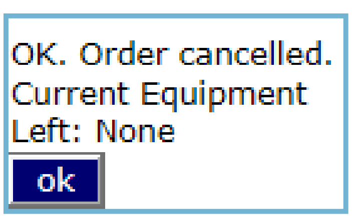

Last Statement Printed: (unknown)

Date	Total	Amount Due
08/26/2016	$35.00	0.00
07/27/2016	$0.00	0.00
01/29/2016	$1999.71	0.00
11/16/2015	$35.00	0.00
04/16/2015	$0.00	0.00
11/06/2014	$1989.00	0.00
04/30/2014	$0.00	0.00
02/20/2014	$7.00	0.00

5. If the hearing aid has not been delivered, click **cancel.** (If the hearing aid has been delivered, skip to step 10.
6. Select the hearing aids to be cancelled, then click **ok**



7. Click **ok** again on the next screen to open the Purchase Summary



Return to Table of Contents

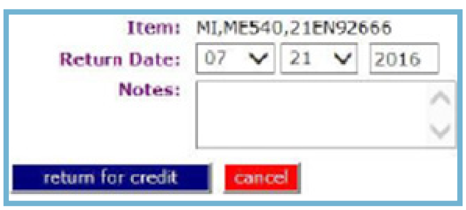
8. Enter a refund if applicable. Consult with your franchise owner or manager for regarding appropriate refund processes.
9. Click **save**

Note: If the hearing aid has been delivered in Sycle, follow the process below for returning a hearing aid. However, if you return a hearing aid that **has not been delivered** it will **not** remove it from the Current Equipment in Sycle.

Non AP/PO Version

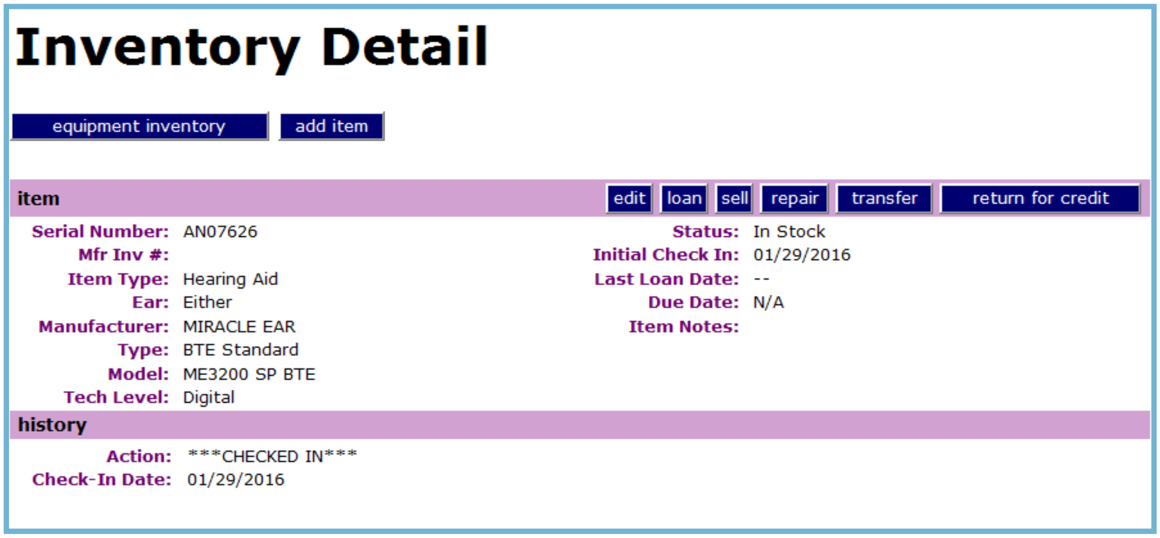
10. If the hearing aids will be returned for credit to the factory, go to the **inventory** section
11. Locate the item from stock and click **return for credit**

12. Select the **date** of the return for credit, and add any **notes** regarding the return



<u>Non AP/PO Version</u>

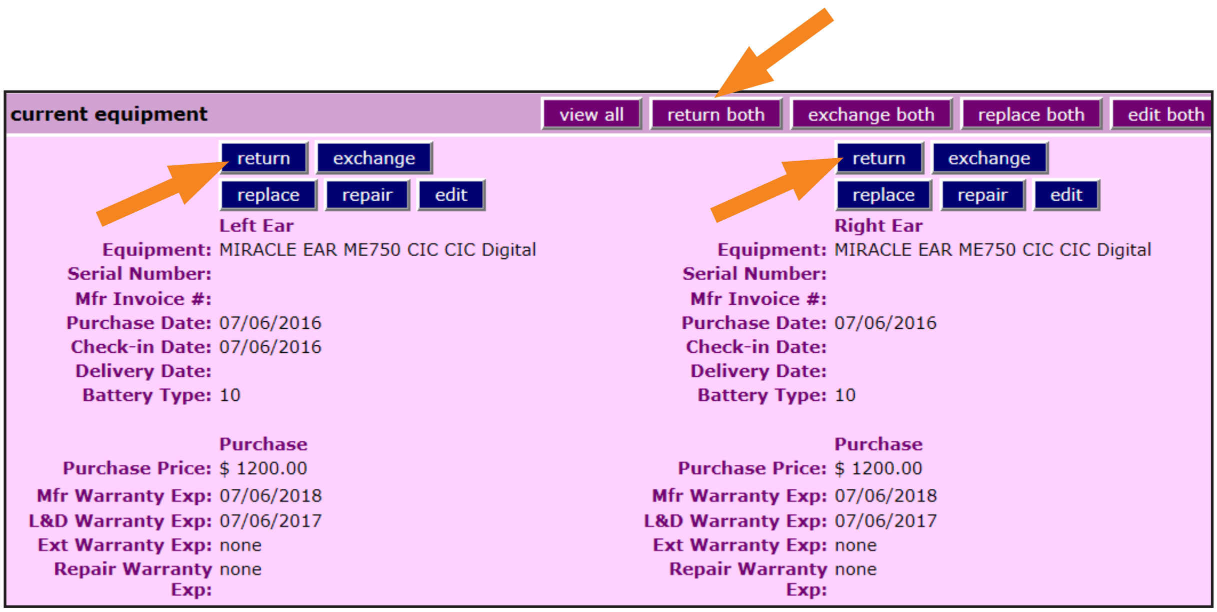
13. Go to the **inventory** section
14. Select **Purchase Orders Cancelled** in the drop down list
15. Click on the **purchase order**, then **Save**
16. If the hearing aids will be returned for credit to the factory, click **return for credit**



17. Select the **date** of the return for credit, and add any **notes** regarding the return

Entering a Hearing Aid Return

1. Search for the **customer**
2. Click on the **customer name**
3. The ***Customer Summary*** screens opens
4. Verify the ***model*** and ***price*** of the hearing aids to be returned
   - **Note:** From the Purchase Agreement that the patient has signed, make note of the amount of money to be refunded for the return, prior to refunding the amount of money. Cross reference this amount when the Purchase Summary populates in Step 9.
5. In the Customer Summary, scroll down to ***Current Equipment***
6. Click on the **return** button (or **return both** to return a binaural set)



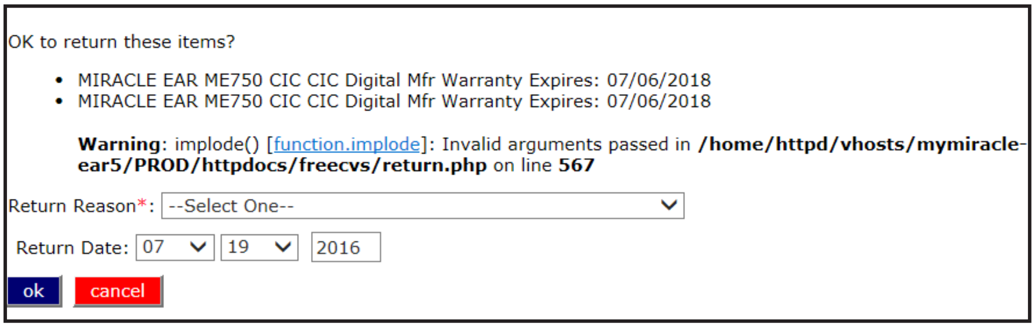
If the *return* button does not display:

If the Purchase Summary for the hearing aids to be returned has not been entered into Sycle, the return button will not be visible and the return will not function. Verify the reason the return was not entered and determine the date the original sale should be entered in Sycle.

The button will be accessible if the original invoice is recreated.

a. Go to the original appointment date on the schedule
b. Create an appointment for the original purchase if the appointment is not on the schedule.
c. Enter the outcome, click yes there was a purchase the Purchase Summary
d. Go back to the Customer Summary, and scroll down to ***Current Equipment***
e. The ***return*** button will now appear

7. The *return* screen opens. After verifying, click **ok**.
8. Select the required reason for the return in the drop-down selection as shown below.


OK to return these items?

- MIRACLE EAR ME750 CIC CIC Digital Mfr Warranty Expires: 07/06/2018
- MIRACLE EAR ME750 CIC CIC Digital Mfr Warranty Expires: 07/06/2018

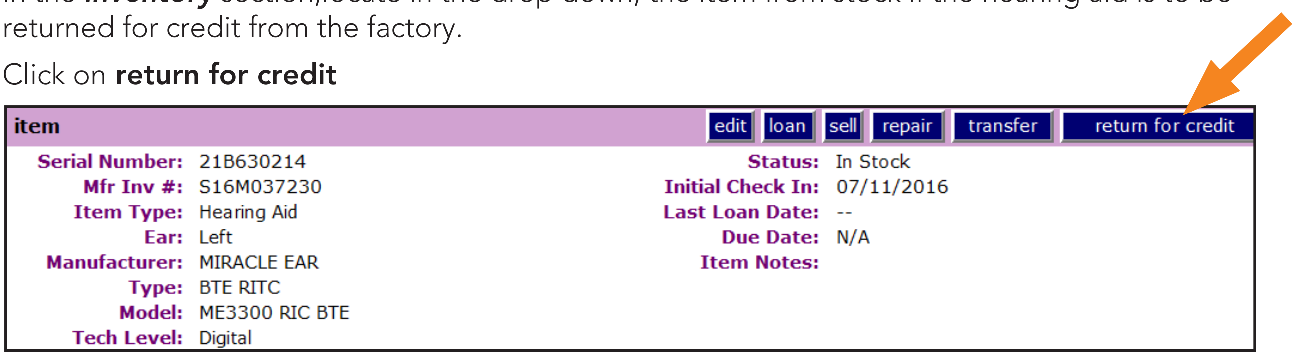
Warning: implode() [function.implode]: Invalid arguments passed in **/home/httpd/vhosts/mymiracle-ear5/PROD/httpdocs/freecvs/return.php** on line **567**

Return Reason*: --Select One--

Return Date: 07 19 2016

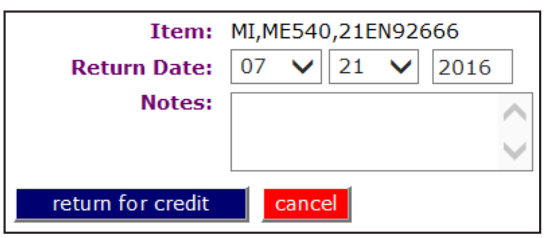
ok cancel

9. The *Purchase Summary* opens with the old hearing aid returned listed
10. If there is an amount to be refunded to the customer, click the **refund** button
11. Enter **amount to be refunded**, then click **save**.
12. In the ***inventory*** section,locate in the drop down, the item from stock if the hearing aid is to be returned for credit from the factory.
13. Click on **return for credit**


item edit loan sell repair transfer return for credit

Serial Number: 21B630214
Mfr Inv #: S16M037230
Item Type: Hearing Aid
Ear: Left
Manufacturer: MIRACLE EAR
Type: BTE RITC
Model: ME3300 RIC BTE
Tech Level: Digital
Status: In Stock
Initial Check In: 07/11/2016
Last Loan Date: --
Due Date: N/A
Item Notes:

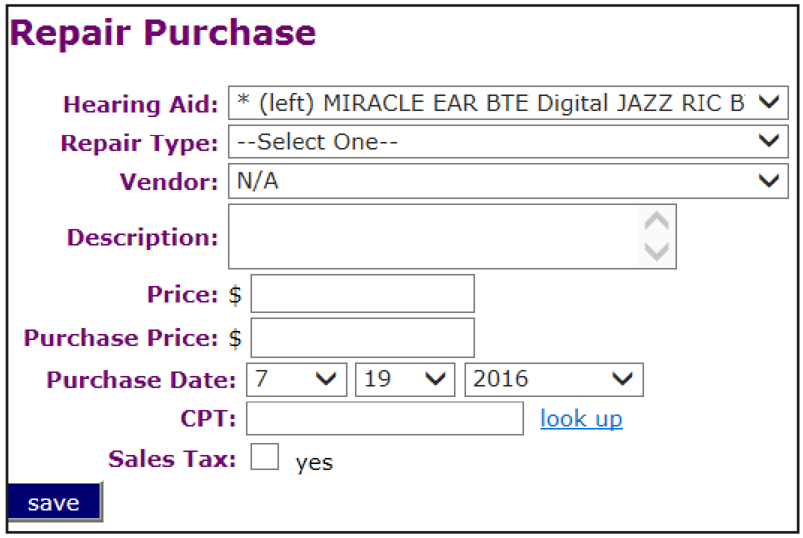
14. Enter the **return date** and any **notes**, then click **return for credit**


Item: MI,ME540,21EN92666
Return Date: 07 21 2016
Notes:

return for credit cancel

Creating a Hearing Aid Repair or Rapid Exchange

1. Search for the customer
2. Go to the ***Customer Summary***
3. Scroll down to the **Current Equipment**
4. Click on the **repair** button for the product to be repaired *(this includes a Rapid Exchange)*. The ***Repair Purchase*** screen opens.
5. Select the **Repair Type** using the drop-down list.
    a. If the repair type has been set up in Administration, the price will auto populate
    b. If the repair type has not been set up in Administration, enter the price the patient is paying for the repair (if applicable)
6. Click the **payment** button
7. Enter the **type** and **amount** of payment
8. Click **save**



When the hearing aid is received from the factory:

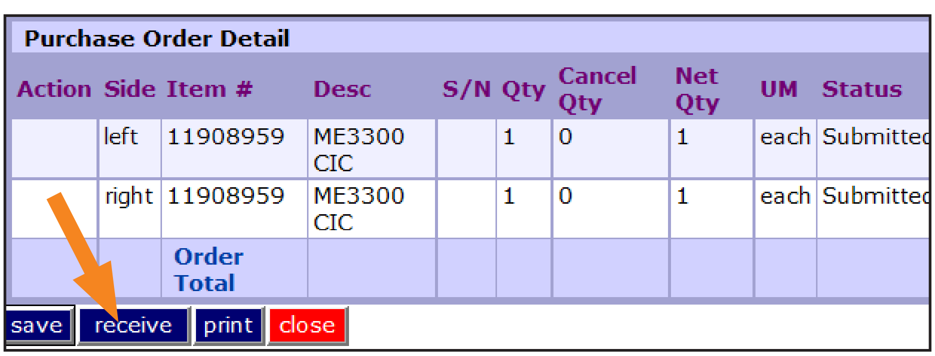
1. Click on the purple *inventory* section on the *appointment* screen.

<u>Non AP/PO Sycle</u>

2. Go to ***Hearing Aid Check-In***
3. Select the **customer**
4. Enter the serial number/invoice from the packing slip
   Note: if a ***Rapid Exchange*** is received you will need to enter a serial number

<u>AP/PO Sycle</u>

2. Click on **Purchase Orders Submitted** in the drop-down menu
3. Click on the **Purchase Order** for the customer
4. Click the **receive** button
5. Enter the **serial number** and **invoice number** from the packing slip



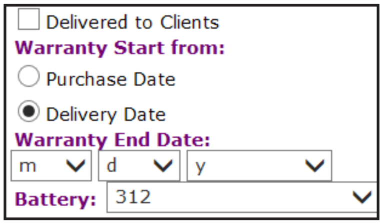
Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status
	left	11908959	ME3300 CIC		1	0	1	each	Submitted
	right	11908959	ME3300 CIC		1	0	1	each	Submitted
		Order Total							

save receive print close

When the customer completes the Delivery appointment:

1. Click on the purple *inventory* section on the *appointment* screen
2. Click on **Items to be Delivered to Customers**
3. Select the **customer,** then click the **Delivered to Clients** check box
4. Select the **Delivery Date** radio button
5. Enter the **Warranty End Date**
6. Verify the **Battery** size



Replacing a Loss and Damage Hearing Aid

1. Search for the customer in the appointment screen
2. Click on the **name** in the ***Customer List***
3. The ***Customer Summary*** screen opens
4. Scroll down to the ***Current Equipment***
5. Verify the **model** and **price** of the aid to be replaced
6. Click the **replacement** button
7. The ***Replacement screen*** opens
8. Enter the **amount charged** to the customer
9. Click on the **payment** button and enter the **payment type** and **amount**

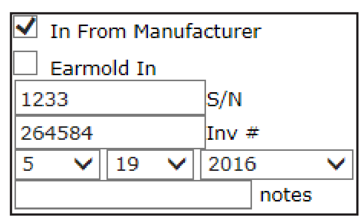
Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action
1	Left Hearing Aid	MIRACLE EAR ME108 BP2 BTE BTE Digital Replaces Left Hearing Aid: MIRACLE EAR ME750 CIC CIC Digital	$250.00	$250.00			edit delete

Invoice Total	$250.00
Sales Tax	$0.00
Grand Total	**$250.00**
Insurance Payments	$0.00
Total Write-Offs	$0.00
Customer Payments	$0.00
Amount Due from Insurance	**$0.00**
Amount Due from Customer	**$250.00**

When the hearing aid is received from the factory:

1. Click on the purple *inventory* section on the *appointment* screen

<u>**Non AP/PO Sycle**</u>



2. Go to ***Hearing Aid Check-In***
3. Select the **customer**
4. Check the **In From Manufacturer** box
5. Enter the **serial number** and **invoice number** from the packing slip
6. Click **save**

<u>**AP/PO Sycle**</u>

2. Click on **Purchase Orders Submitted** in the drop-down menu
3. Click on the **Purchase Order** for the customer
4. Click the **receive** button
5. Enter the **serial number** and **invoice number** from the packing slip
6. Click **save**

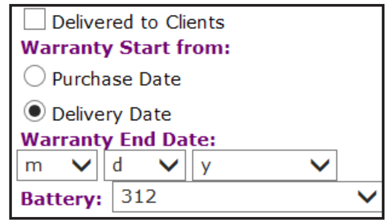
Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Ca Qt
	left	11908959	ME3300 CIC		1	0
	right	11908959	ME3300 CIC		1	0
		Order Total				

save receive print close

When the customer completes the Delivery appointment:

1. Click on the purple *inventory* section on the *appointment* screen
2. Click on **Items to be Delivered to Customers**
3. Select the **customer,** then click the **Delivered to Clients** check box
4. Select the **Delivery Date** radio button
5. Enter the **Warranty End Date**
6. Verify the **Battery** size



Entering a Trade Up Sale

After the model exchange period, a Trade Up sale is entered as a new hearing aid purchase in Sycle. (*Refer to the process for entering a new hearing aid purchase on page 32.)*

Prior to entering the purchase, check the **Referral Source** and **Subcategory** the Trade Up promotion has been entered into. This is necessary to correctly enter the outcome of the appointment. Pricing and discount amounts should be entered based upon the local franchise Trade Up program price list. Check with your hearing care professional (HCP) or franchise owner for steps to return the old hearing aid/s to the manufacturer.

PURCHASE ORDER FUNCTIONALITY

Purchase orders assist in managing the status of products purchased or on consignment from the manufacturer and are a feature of the AP/PO Sycle.

After the entry of an Appointment Outcome and the creation of a Purchase Summary, the Purchase Orders will be generated in Sycle.net.

Staff will submit the Purchase Order in Sycle.net and order the hearing aid from myMEMSI per the usual process.

The following steps explain how to for submit, receive and deliver a Purchase Order.

1. On the Purchase Summary, there is a Purchase Order number to the right of each line item. Click the **Purchase Order number**, then click to **Submit the Purchase Order**.

Unit Price	Amount	Delivered	Reference	Action	Purchase Order
$4,745.00	$3,745.00	(Returned to Vendor)			16244079071

When the hearing aid is received from the factory:

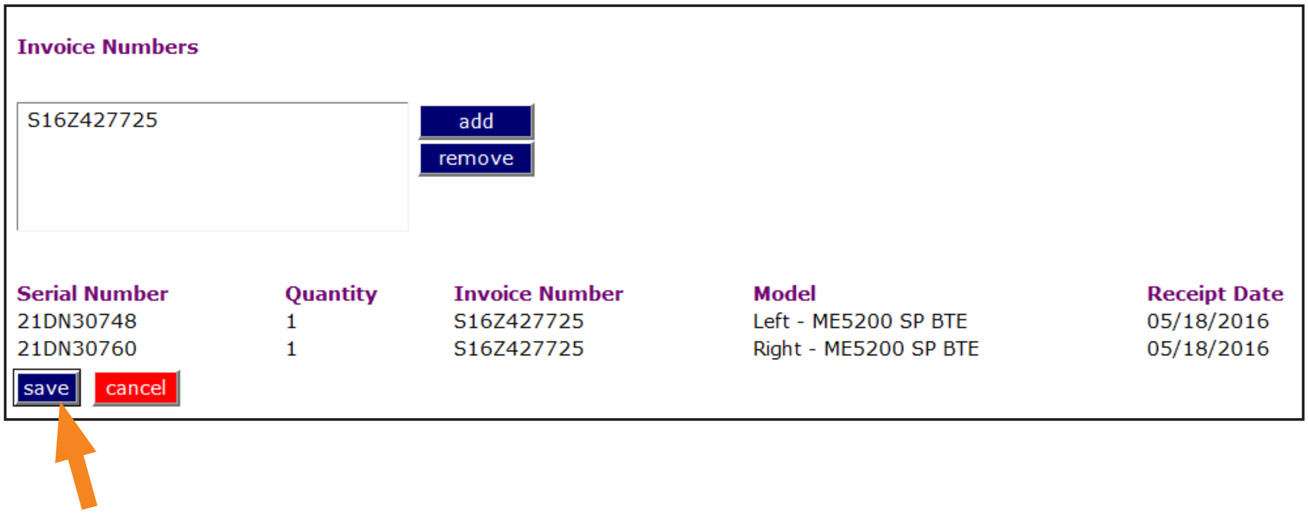
1. Click on the purple *inventory* section on the *appointment* screen
2. Select P**urchase Orders Submitted** from the drop-down list
3. Click the **number of the submitted Purchase Order**
4. Click **receive**

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recvd Qty	Recvd Date	Unit Cost	Ext Cost
	left	11510776	ME5200 SP BTE	21DN30748	1	0	1	each	Received			1	05/18/2016		
	right	11510776	ME5200 SP BTE	21DN30760	1	0	1	each	Received			1	05/18/2016		
		Order Total													

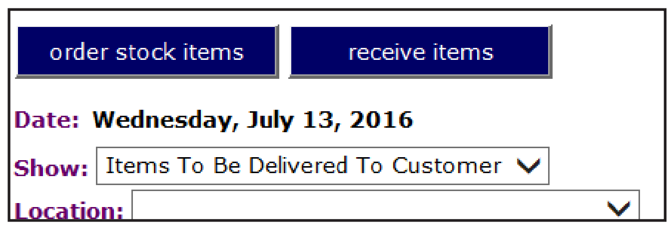
save receive print close

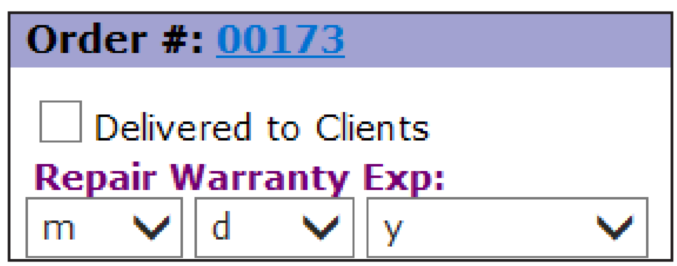
5. Click **add** to add the **invoice number** from the manufacturer packing slip
6. Add the **serial number,** then select the **invoice number** in the box across from the serial number
7. Click **save**



When the customer completes the Delivery appointment:

1. Click on the purple *inventory* section on the *appointment* screen
2. From the ***Show*** drop-down list, select **Items to be Delivered to Customers**
3. Check the **Delivered to Clients** box
4. Enter the date for **Repair Warranty Exp:**
   Note: make sure you enter the correct year

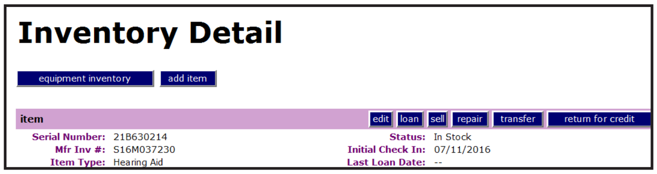




Transferring a Hearing Aid to Another Location

AP/PO Sycle

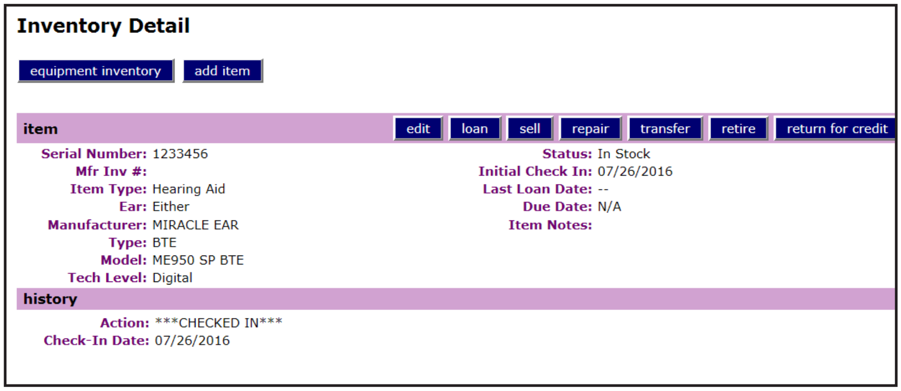
1. Click on the purple *inventory* section on the *appointment* screen
2. The ***inventory*** screen opens. Click on **hearing aids in stock.**
3. Click on the **serial number** to be transferred to another location
4. The ***Inventory Detail*** screen opens



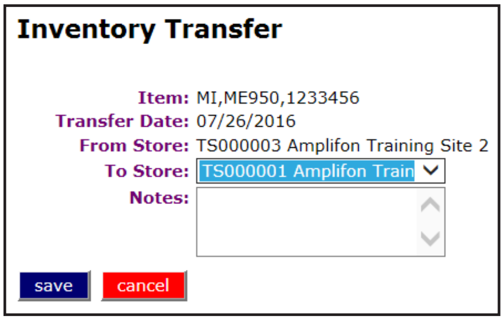
5. Click the **transfer** button
6. The item populates. Click the **store to transfer to** and **add any notes**.
7. Click **save.**

Non AP/PO Sycle

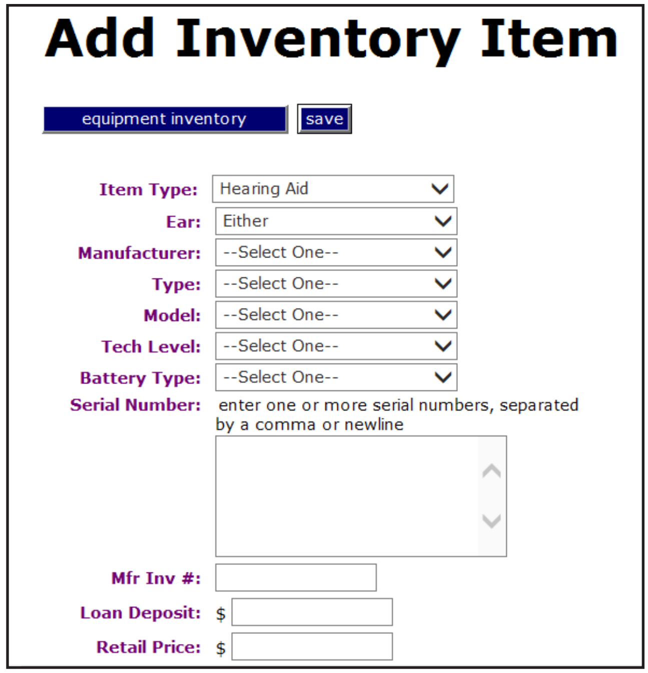
1. Click the purple **inventory** section on the ***appointment*** screen
2. The inventory screen opens. In the drop-down menu, select **BTE in stock**
3. Click on the **serial number**
4. The Inventory Detail opens. Click the **transfer** button



5. The ***Inventory Transfer*** screen opens. Click on the **store to transfer to**.
6. Click **save**



Transferring a Hearing Aid to Another Location



Non AP/PO Sycle

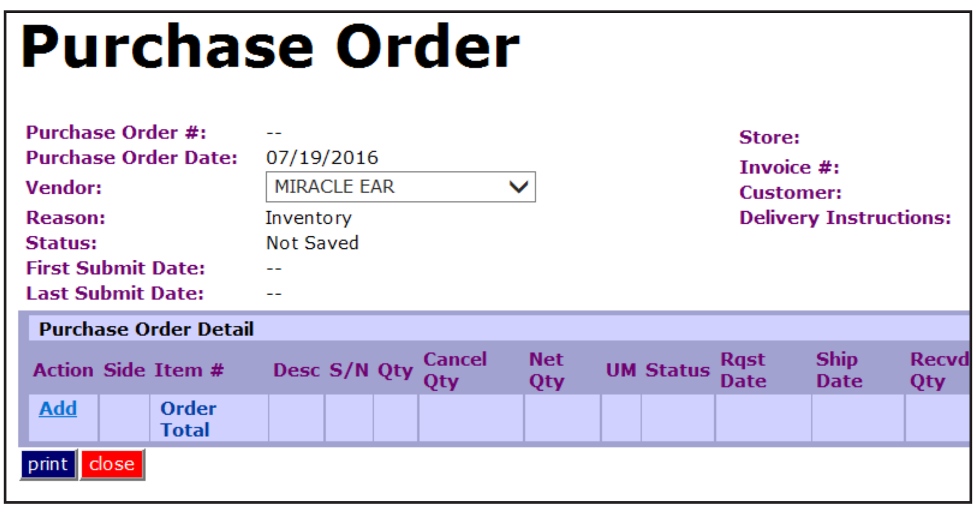
1. Click on the purple **inventory** section of the ***Appointment*** module
2. The Inventory screen opens. Click **add to In-Stock.**
3. The **Add Inventory** screen opens. Enter the following information for the hearing aid being added:
   - Manufacturer
   - Type
   - Model
   - Tech level
   - Battery
   - Serial number
4. Click **save**

AP/PO Sycle

1. Click on the purple **inventory** section of the ***Appointment*** module after ordering the stock from myMEMSI.
2. The Inventory screen opens. Click on **Order Stock Items.**
3. The Purchase order screen opens. Click on the **manufacturer**, then click **Add.**

Note: The stock inventory product must be added to the hearing aid price list in the Admin Module in order to select it in this section.

4. Select the **model** and **serial number** to add to stock
5. Click **save**



Entering Referral Sources and Subcategories

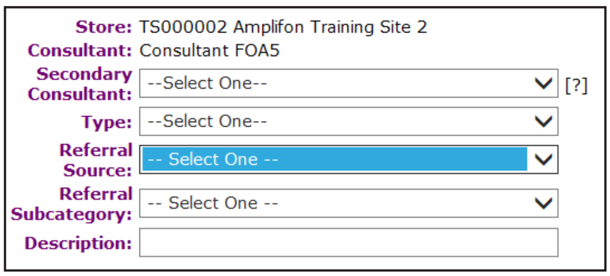
The ***Referral Source*** is the marketing media type that prompted the caller to reach out to Miracle-Ear.

Selecting the referral source is required when creating an appointment. Always ask the caller how they heard about Miracle-Ear so that you can select the correct marketing source. If the referral source was entered incorrectly, it can be edited in the appointment outcome.

The ***Referral Subcategory*** is the individual marketing promotion, promotion code, or offer the caller responded to, and is also required when scheduling an appointment. The subcategory will auto fill in the drop-down menu when the Referral Source is selected.

To select the correct Referral Source:

1. From the ***New Appointment*** screen, click on the **Referral Source** drop-down menu. Make the appropriate selection.
2. In the **Referral Subcategory drop-down** menu, click on the **local promotion and offer** for that marketing type.



The Referral Sources are entered in the Administration Module monthly by the franchise owner or a staff member who has been assigned Admin Privileges.

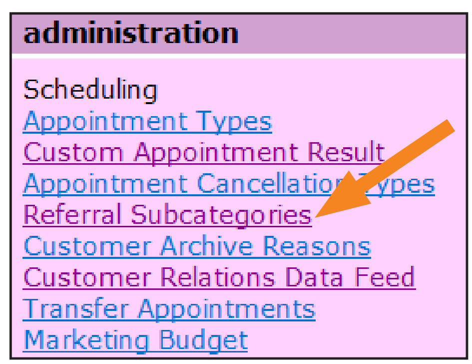
To create a new Referral Source:

1. To access the Referral Source set up, in the ***Admin Module*** click on **Referral Subcategories**
2. The ***Referral Source*** screen opens. Select a **Referral Source** for the local creative date and offer
3. Click **add another subcategory**
4. Enter the monthly promotion as follows:
   Creative /Date/Offer
   If there is a marketing code, it should be entered in the Code field in the administration module
5. Click **save**

Note: There are 50 characters in this field. Enter the code, creative, date and offer in a consistent format for all locations.

Abbreviate when possible so staff has visibility of all characters in the field.

- Once the patient has purchased a Miracle-Ear hearing aid, always verify and/or select the Referral Source.
- Each Referral Subcategory should be entered monthly, or as the new promotion is determined for the month.
- Always consult with the franchise for the current month creative and offers to ensure the correct subcategory is selected.
- Marketing promotions older than ***three months*** should be deleted to eliminate too many selections when creating an appointment.
- Deleting old Referral Sources does not delete historical tracking of the marketing promotion. To find results for deleted promotions go to the *Referrals* report and filter by the date range.



Tracking Marketing Promotions in the Referral Report

The results tracked in the ***Referral*** report are dependent upon the office staff's diligence in entering the correct Referral Source and Subcategory. To access the report, complete the following steps:

1. Go to **Reports module,** then select the **Referrals Report**
2. Filter by **date range** and **store**
3. In the report, click on the **left column** for the type of Referral Source (marketing medium)
4. View the appointments generated by each subcategory, or promotion, for the type of marketing (shown at right)
5. The ***referral source detail*** screens opens to show appointments generated by each promotion (shown below)

Aftercare	103
Billboard	0
Consumer Referral	1
Direct Mail	10
Grass Roots	2
Location / Signage	2
Magazine	0
Managed Care	0
Newspaper	3

2016 JULY OPEN HOUSE $10Red Lobster/BOGO	4
Public Notice/ $25 Red Lobster JULY 2016	3
USE IT OR LOSE IT JUNE 2016	1
letter sent to come in.	0
Total	**9**

Tracking Sales Revenue by Promotion

1. Click the **Sales by Referral Source** button
2. Select the **Referral Source** to track
3. A *sales summary* displays at the bottom of the screen. Click the **DOWNLOAD** button to export the data to Excel.

Direct Mail summary DOWNLOAD

Subcategory	Avg Sale Price	Gross	Discount	Net	Units
Dollars and Sense MAY 2016	$2,200.00	$6,990.00	$2,590.00	$4,400.00	2
Open House- FEB 2016- Genius Demo 50% off/vo	$2,697.58	$38,740.00	$6,369.00	$32,371.00	12

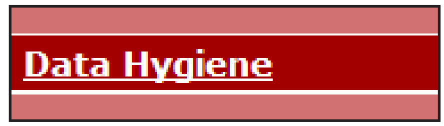
Database Cleansing (aka: Data Hygiene)

The database cleansing program allows the user to maintain current and relevant patient data. When executed by the office staff, the program will update database information for the following:

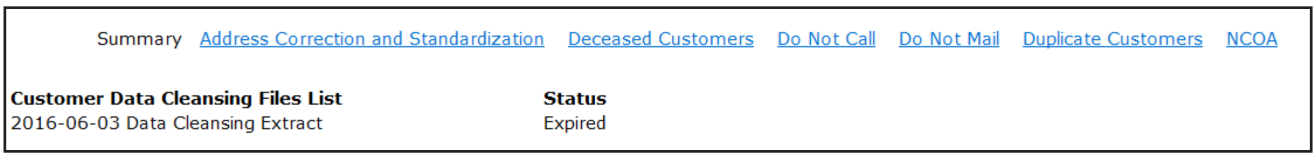
- Address correction and standardization
- National change of address NCOA
- Do not call
- Deceased
- Do not mail
- Duplicate customers

To run database cleansing, complete the following steps:

1. From the ***Appointment*** screen, click the **Data Hygiene** link in the bottom left of the screen



2. The data hygiene screen opens. Click on each **underlined category** to approve the updates.



For specific instructions for each category, see the Database Cleansing Guide.

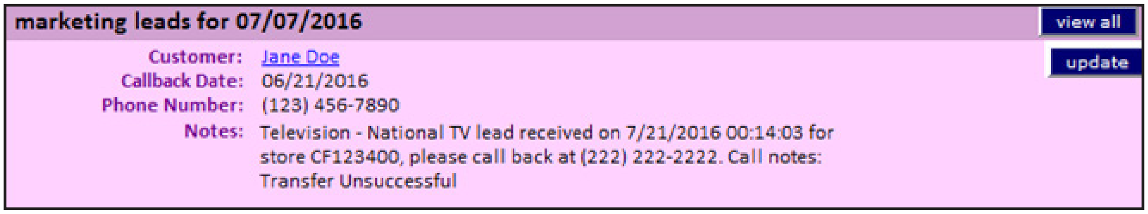
3. Accept or reject suggested updates to database
4. Refresh to view changes made

Staff should accept or reject data hygiene records as soon as possible. If data hygiene records for deceased patients have not been processed within 10 days of receiving the data hygiene notification email, the deceased patient's record will be updated to uncheck the Ok to Mail, Ok to Call, Ok to Text and Ok to Email checkboxes.

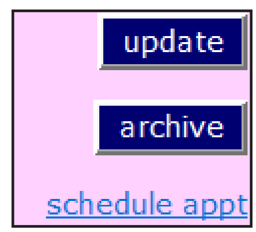
If a patient is listed on the national Do Not Call registry and the franchise is enrolled in the Data Hygiene Program, the Ok to Call checkbox will be automatically unchecked for that patient whne the data hygiene file is received.

Viewing National TV Leads

- National TV calls are transferred to the store from National Call center.
- If the call is not answered when transferred, the lead populates in the Call List on the Appointment screen.



- All national TV calls are recorded on the Yodle Dashboard. Access to the Yodle Dashboard is assigned by the franchise owner and can be used to listen to the call before returning it. This allows staff to better understand the caller's needs and respond more effectively to the call.
- When a call is transferred to you by the National Call Center, always enter the Referral Source **Television/ National TV.**
- If a potential patient walks into the office, make sure ask him or her what brought them in and indicate the appropriate Referral Source.
- Once you've contacted the National TV leads from the Call List, remember to update the marketing lead section promptly to **completed** status:
    - o In the Call List, click the **update** button in the marketing lead section
    - o Change the status to complete as soon as you have made the attempt to contact the customer
    - o A best practice is to make three attempts to contact the caller. If you are not able to reach them, set up future callbacks. *(See page 29)*



Yodle Leads

- Yodle supports the Miracle-Ear National Online Marketing Program. When a call comes in from a Yodle tracking phone line, you will hear the *Yodle whisper*, which is a recording of the word *Yodle,* before you are connected to the caller.
- Use the Referral Source/ Subcategory of **Online/ Store Website** whenever a call comes in with the Yodle whisper feature
- The data from any website leads are uploaded in the Call List hourly. Prior to returning the call, listen to it from the Yodle dashboard *(access granted by franchise owner)*
- Leads that are not directly answered by the location are populated hourly in the call list in the Appointment screen. To view and respond to the leads, complete the following steps:
  1. In the appointment screen click on the purple **call list**
  2. Select **marketing leads** from the drop-down menu
  3. Click the **update** button across from the listing
  4. If you have access to the Yodle dashboard, **listen to the recorded call** prior to returning the call to understand the needs of the caller
  5. Change the status to **complete** as soon as you have made the attempt to contact the customer.
  6. A best practice is to make three attempts to contact the customer. If you are not able to reach them, set up future callbacks.

Note: Do not archive a caller unless the data is missing or incorrect from the online lead

The Yodle Dashboard has recorded inbound calls for:

1. Website leads from Yodle tracking lines
2. National TV leads
3. Calls from local marketing efforts (if set up by the franchise owner)

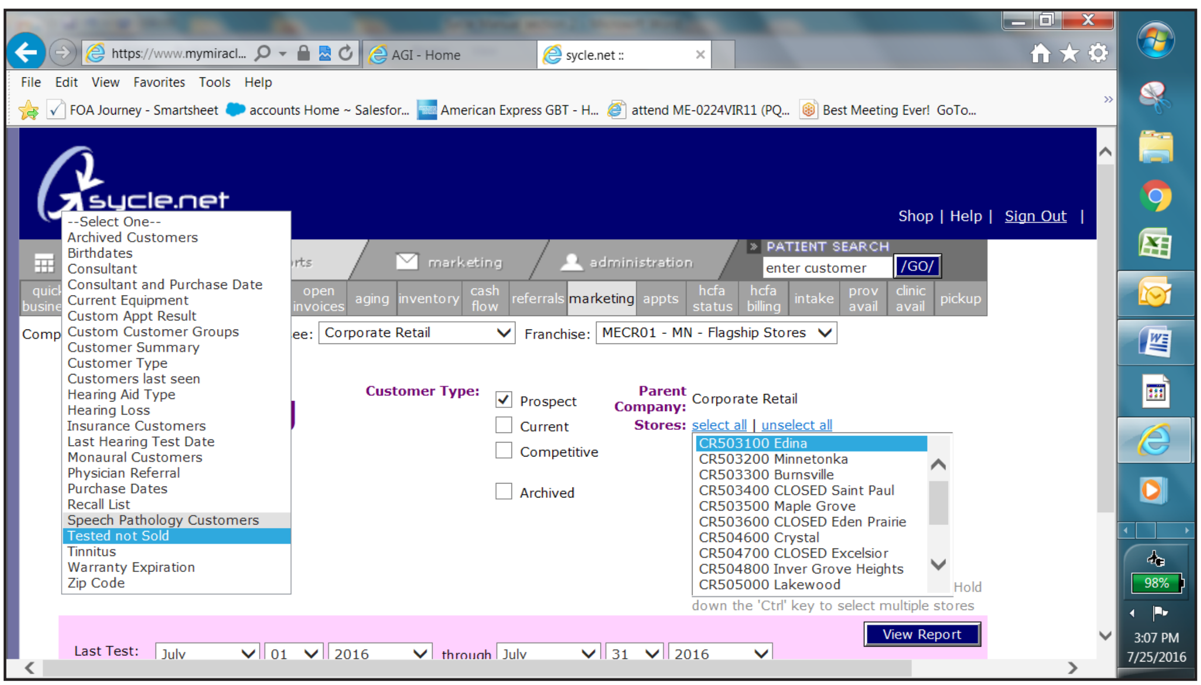
Creating Marketing Lists

The ***Customer Last Seen*** report lists patients that have not been scheduled for an appointment during the time period selected. It is often used to make outbound calls to patient to schedule their annual exam, and is the most commonly used report in Sycle.net.

- To find the reports, go to **Marketing/Marketing Lists**.
- Each report can be downloaded into Excel
- Click on the download button in the top right corner
- Click to open in Excel (Optional: Filter data in Excel, Print, or Save As)

CUSTOMER SEGMENTATION REPORTS

There are twenty-three Customer Segmentation reports in the report drop-down menu. Calling or mailing to active customers and prospects in the Marketing Lists can help generate additional sales opportunities on the schedule. Each Marketing list chooses customers based on the criteria selected when running the report.



Return to Table of Contents

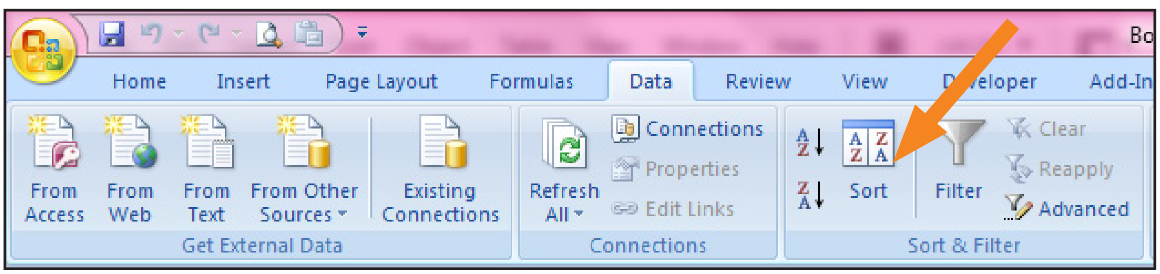
REPORT DEFINITIONS/ACTIVITIES

1. **Archived list**: Pull list of customers that have been archived for marketing suppression lists or to contact by archived reason code
2. **Birthdates:** Pull lists of customers by date of birth to send special promotions or Birthday greetings.
3. **Consultant:** Pull lists of customers by consultant for special event or marketing
4. **Consultant and Purchase Date:** Pull lists of customers for each consultant and the date the customer purchased.
5. **Current Equipment:** Pull lists of customers that are currently wearing a specific model of hearing aid or all hearing aid users. The data is pulled from the Current Equipment section in the Customer Summary
6. **Custom Appointment Results:** Pull lists of customers that meet the criteria for the custom category added to the Appointment Results report. The custom category would be added in the Admin section and staff would enter the result with the completion of the appointment outcome.
7. **Custom Customer Group:** Create lists of customers that belong to a specific group in order to market or contact them for service. The group is set up in the Admin section. The custom group is selected in the appointment outcome. This report pulls the list of customers that have been selected in the group.
8. **Customer Summary:** Summarizes the count for each customer type. The report divides customers into 4 categories: Current, Competitive, Prospect and Tested not sold (TNS is broken out as a separate count but is part of the total in the Prospect count.)
9. **Customer Type:** Pull lists of customers categorized by the type of customer designation. There are 4 customer type designations. Current, Prospect, Competitive and Archived.
    - Current customers should be designated in the database as those with a Miracle-Ear hearing aid purchase
    - Prospect does not have a hearing aid purchase
    - Competitive is a customer that is seen by the office but wear a competitors hearing aid
    - Archived are those customers that have been archived by the staff for a specific reason code.
    - The designation is dependent upon the staff to select the correct customer type when creating a new or editing the existing Customer Summary
10. **Customers Last Seen:** Pulls lists of customers that have not been seen in the office for the time period selected. The report filters out anyone with a future appointment scheduled. Example of activity, if a customer has not been seen for one year the list could be downloaded to schedule the customers for an annual test.
11. **Hearing Aid Type:** Pull lists of customers by the hearing aid technology worn. ie; BTE
12. **Hearing Loss:** Pull lists of patients by the level of loss, the type of loss and the shape
13. **Insurance Customers:** Pull lists of customers by the type of insurance and date of purchase. The insurance must be entered in the Customer Summary to appear on the list. For example, this report could be used to pull customer lists that have an insurance benefit every 3 years.
14. **Last Hearing Test Date:** Pull customer lists filtered by the time period selected for the last hearing test date. For example, pull all current customers during a date range to see if they have been tested.

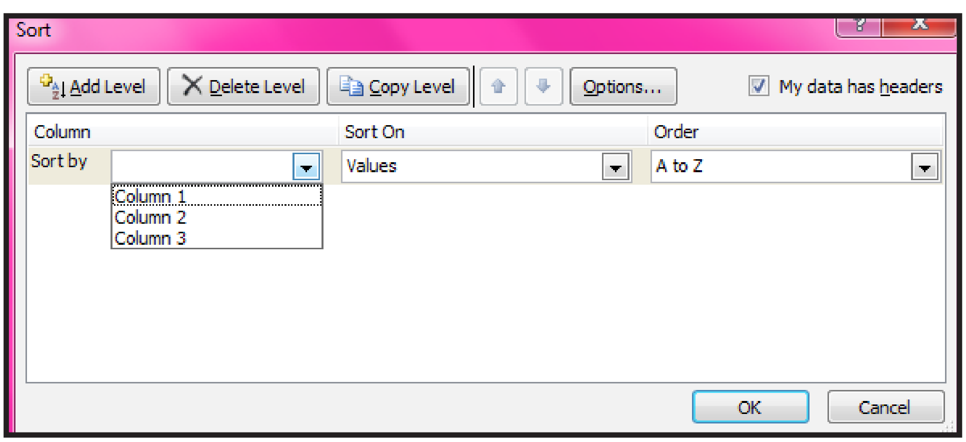
15. **Monaural Customers:** Pull lists of customers with one hearing aid purchase entered into the current equipment section of the customer summary.
16. **Physician Referral:** Pull lists of customers in the database referred by a physician
17. **Purchase Dates:** Pull lists of customers that purchased a hearing aid in the date range filtered with the ability to sort by the product purchased.
18. **Recall list:** Pull lists of customers entered for a follow up call by appointment date, recall date and description
19. **Speech pathology customers:** Pull list of customers that have speech pathology as indicated in the appointment outcome.
20. **Tested not sold:** Pull lists of customers filtered by date range that have been tested with a loss, but did not purchase
21. **Tinnitus:** Pull lists of customers where Tinnitus has been selected in the appointment outcome.
22. **Warranty Expiration:** Pull lists of customers filtered by date range with a warranty that has expired.
23. **Zip code:** Pull lists of customers by zip code or several zip codes.

EXCEL TIPS:

- To eliminate a column, right click within a cell, select **Delete**, then select the **Entire Column** radio button. Click **Ok** to delete the column.
- To sort the data:



  - Highlight the **page** below the header. From the ***Data*** ribbon, click **Sort**.
  - Ensure the **My data has headers** checkbox is selected, then choose the column you wish to sort by from the **Sort by** drop-down menu. Click **OK** to sort the report by the column chosen.



Customer Relationship Management (CRM)

Customer Relationship Management currently has over 25 letters that are generated based upon the appointment criteria in Sycle. The letters are selected by the franchise owner and are mailed automatically.

If the franchise owner or admin staff would like to set up a CRM letter for the franchise, he or she should follow steps 1-4 below:

1. Go to the ***Administration*** section
2. On the left column, click on the **Customer Relations Data Feed**
3. Click on the **desired letters** to mail to customers
4. Contact your **regional marketing manager** (if consultation is needed for letter offers)

FOLLOWING UP ON CRM

From the Marketing module, go to the Sent Mail report to view all CRM mail activity that should be followed up with a phone call.

Prospects or customers who were recently mailed CRM letters from the location's database will auto populate in the Call List to provide a quick and easy list for staff to make follow-up phone calls. From the schedule screen, click on CRM Follow Up in the Call List to find the current list.

Wednesday, November 21 call list

Call List	Qty.
CallBacks	2
Marketing Leads	0
Amplifon Referrals	0
CRM Follow Up	0
Confirmed	0
Not Confirmed	0
No Show	1
Cancelled	0
Reschedule	1
Fitting	2
Repair Pickup	0
Waiting List	0
Show all...	

Birthday Card

1. Click on customer name
2. Check in the Customer Summary for:
   a. Last appointment date
   b. Any notes from previous appointments
   c. Last purchase date

Follow-Up Best Practices

- Wish the customer a Happy Birthday! From the Customer Summary, check if the last test date was over a year ago and that the patient's hearing aids are at least three years old. If so, call to schedule an annual evaluation.
- last test date is over one year or if last purchase date is 3 years or call to schedule an Annual Test
- Invite customer to pick up free batteries

Customer Trade Up Letter

1. From the ***Marketing*** module, go to **Sent Mail**
2. Locate the Customer Trade Up Letter in the list
3. Click on the **underlined number** in the column showing letters mailed to patients

Follow-Up Best Practices

- Call customers receiving the letter each quarter.
- Invite them to schedule an annual hearing evaluation if needed or have them come in to have their hearing aids cleaned and checked

Warranty Expiration Letter

1. From the ***Marketing*** module, go to **Sent Mail**
2. Locate the Warranty Expiration Letter from the list
3. Click on the **underlined number** in the column showing the number of letters mailed to patients

Follow-Up Best Practices

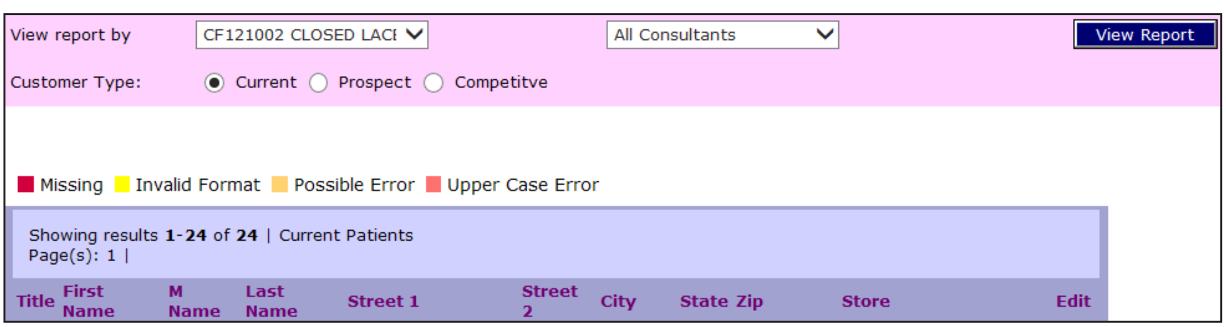
- Call the customer receiving the letters for the month.
- Invite them to schedule an annual hearing evaluation if needed or have to come in to have their hearing aids cleaned and checked
- Invite them to an appointment to tune up their hearing aids prior to the warranty expiring

Invalid Addresses

This report checks if addresses in the database are accurate and will allow you to make any changes to update the address/es for future mailing. To access it, go to the ***Marketing*** module, then click ***invalid addresses.***

The addresses that need updating will be color coded as follows:

- Dark Pink: Missing information
- Yellow: Invalid format
- Beige: Possible errors
- Light Pink: Upper case error (**Note:** addresses that are typed in all capital letters may be rejected at the post office so they need to be corrected)



To correct address errors, click **Edit** (across from the address) next to any addresses that need modification. Make the necessary changes, then click **save**.

The Reports Module

For more information about how to use the Reports module in Sycle.net, view the LMS lesson ***Sycle.net Module 7-Reports in Sycle.net.***

CALLBACK LIST DASHBOARD

What:

This report displays the count of all marketing leads, information requests, CRM follow-up lists and Amplifon Hearing Healthcare Referrals. The report filters each patient by the timeline of the lead or list.

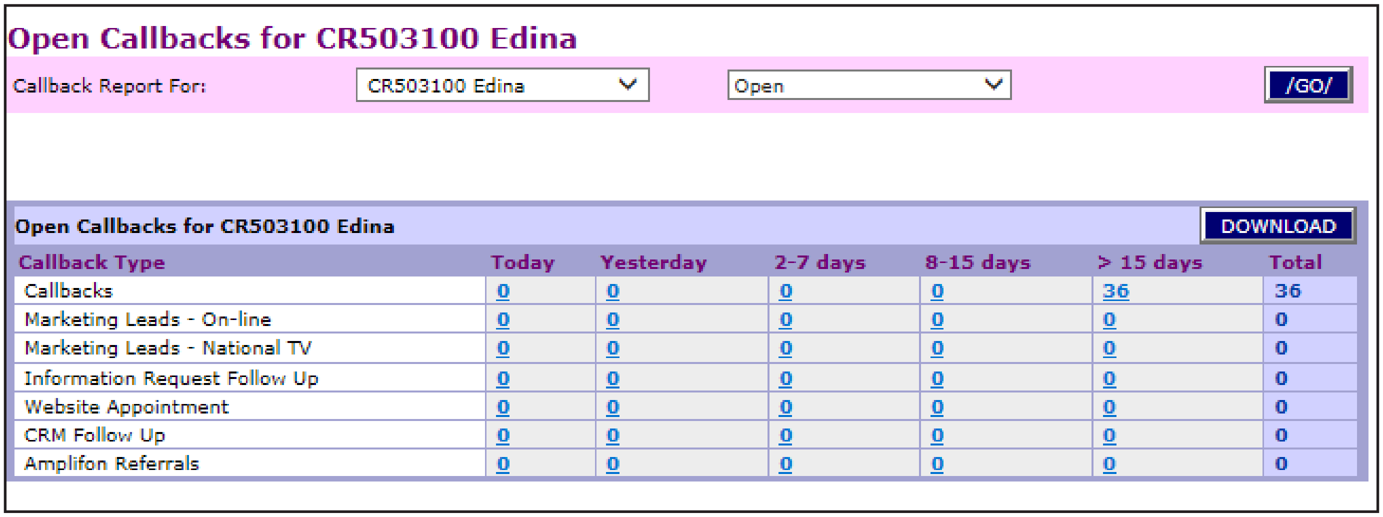
This report can also be used to track appointments that are scheduled online by the patient. These are listed under the Website Appointment link.

Why:

- To track the number of leads, information requests or CRM follow-up lists received during a time period
- To create call lists for one location or all locations in a quick, easy-to-access format

How:

1. Go to the Reports module
2. Under Marketing Reports, click Callback List Dashboard
3. Use the drop-down menu to select:
   a. one store or All Visible Locations
   b. The type of callback to display (Open, Completed, Canceled, Archived)
4. Click Go
5. Click any of the underlined numbers to view the list of patients


Open Callbacks for CR503100 Edina

Callback Report For: CR503100 Edina | Open | /GO/

Open Callbacks for CR503100 Edina | DOWNLOAD

Callback Type	Today	Yesterday	2-7 days	8-15 days	> 15 days	Total
Callbacks	0	0	0	0	36	36
Marketing Leads - On-line	0	0	0	0	0	0
Marketing Leads - National TV	0	0	0	0	0	0
Information Request Follow Up	0	0	0	0	0	0
Website Appointment	0	0	0	0	0	0
CRM Follow Up	0	0	0	0	0	0
Amplifon Referrals	0	0	0	0	0	0

EMAIL ADDRESS TRACKING REPORT

What:

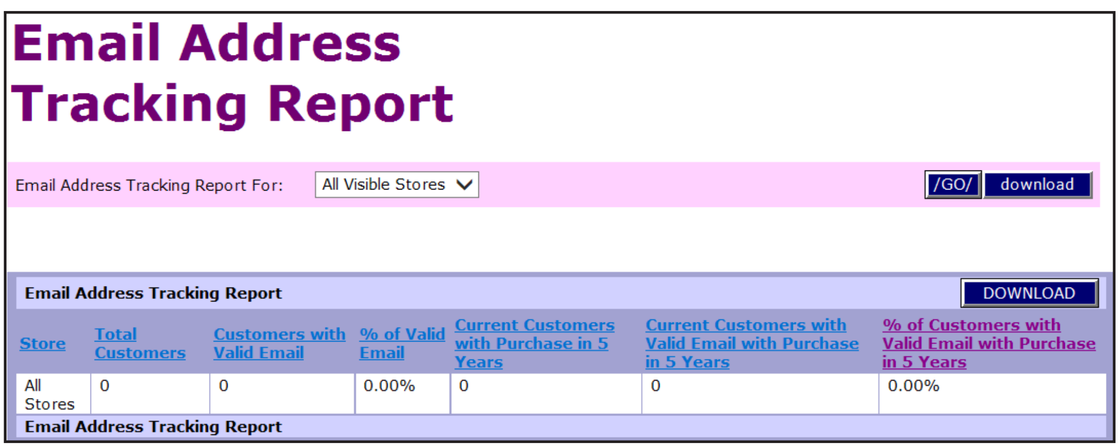
- View by location
- Total customer count
- # of customers with email
- Customer count with purchase in past 5 years
- # of current customers with purchase in past 5 years with email
- % of current customers with purchase in past 5 years with email

Why:

- To track the number and percent of emails in the database

How:

1. To locate a list of customers without emails, go to the **Marketing module**, click **Marketing lists**, then select the **Customer Type Report**
2. Check the box for **Current Patients**, then click **go** to pull the list of all current patients
3. Click the **download** button to export the list to Excel
4. Sort the data to find patients without email addresses *(see 58 page for instructions)*
5. **Best Practice:** Call patients who do not have email addresses listed. Verify their contact information, including their email address and cell phone number, and make any necessary changes to the patient's record.



Email Address Tracking Report

Email Address Tracking Report For: All Visible Stores /GO/ download

Email Address Tracking Report DOWNLOAD

Store	Total Customers	Customers with Valid Email	% of Valid Email	Current Customers with Purchase in 5 Years	Current Customers with Valid Email with Purchase in 5 Years	% of Customers with Valid Email with Purchase in 5 Years
All Stores	0	0	0.00%	0	0	0.00%

Email Address Tracking Report

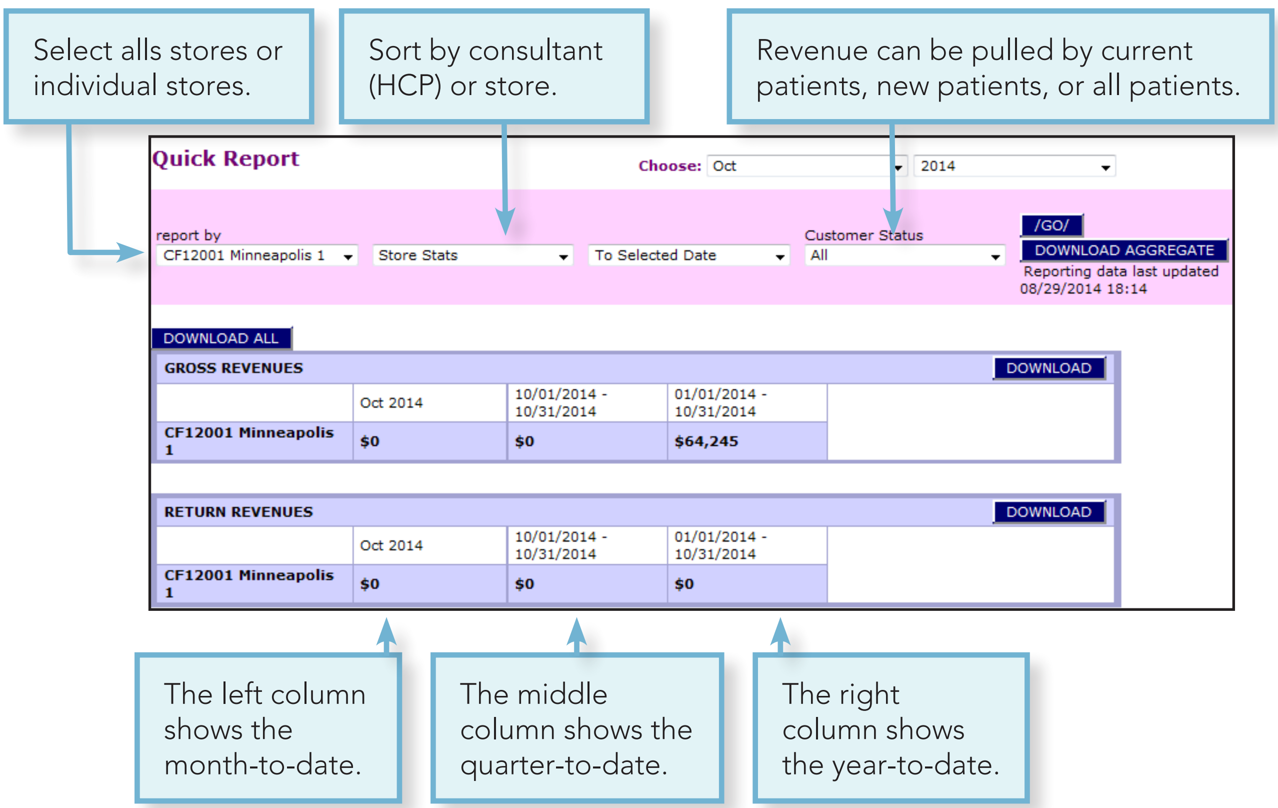
QUICK BUSINESS REPORT

What:

- High level view of financials and units sold
- Detailed view of revenue report sections
- Includes KPIs
- Displays month, quarter and year-to-date sales

Why:

- Review Financial & Key Performance Indicator (KPI) results by location, entire franchise and/or specific consultants



Key Performance Indicators (KPI)

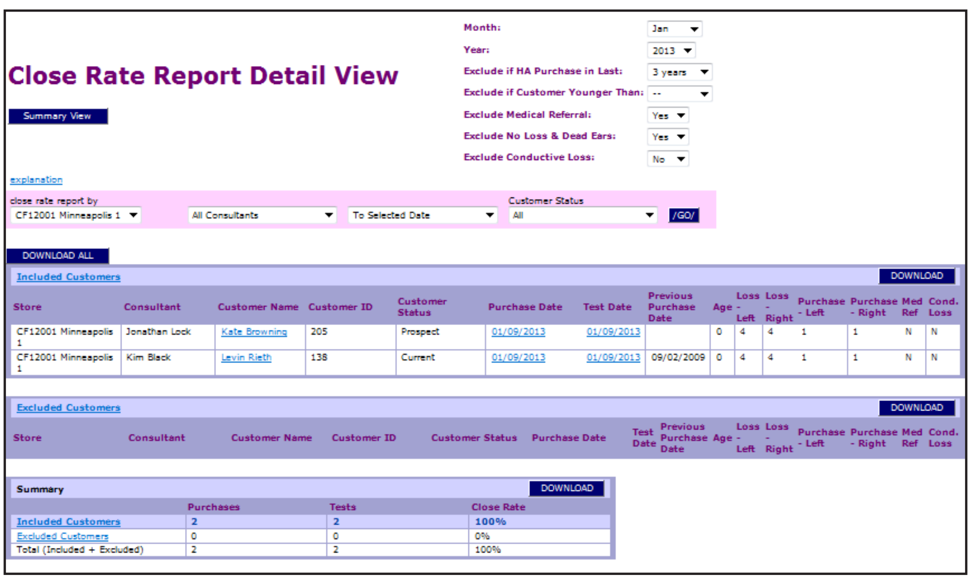
The following KPIs are measured and displayed in the Quick Business Report:

- **Close Rate:** total appointments with sales divided by total sales opportunities. It is the percentage of patients that purchased a hearing aid, had a loss between 2-5, and did not have a medical referral or a prior hearing aid purchase within the past three years.
- **Average Selling Price (ASP):** based on net revenue divided by net units
- **Binaural Rate:** percentage of patients that purchased two hearing aids compared to the total number of patients that purchased hearing aids
- **Return Rate:** percentage of sales that have been returned, excluding an exchange

Close Rate Report Detail View

1. From the Close Rate section of the Quick Business Report, click the**Full Report** link
2. Click **Detail View**
3. The current month is the default date range. Adjust the date range of the report by selecting the **start and end dates**
4. ***Included*** and ***excluded*** patients are displayed
    a. Records are **excluded** if:
        i. The patient has a hearing aid purchase in last three years
        ii. Medical referrals
        iii. No loss/profound loss
    b. Records are **included** if:
        i. The loss is in the range between 2-5

The summary at the bottom totals the number of patients who have purchased hearing aids and the total number of hearing tests given during the time period. The close rate is displayed with patients included and excluded in the calculation.



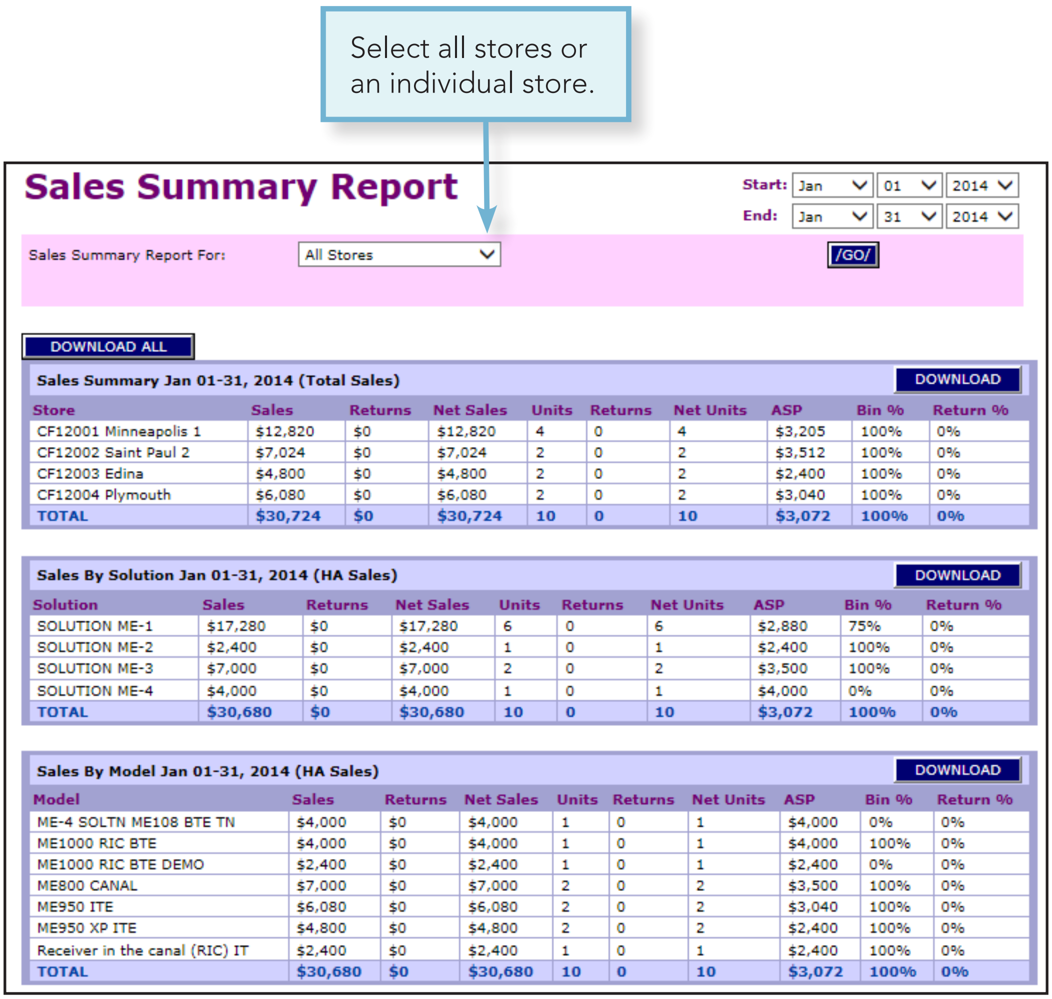
SALES SUMMARY REPORT

What:

- A high level view of sales during time period selected
- Displays hearing aids sold by model and solution
- Key Performance Indicators by Solution- Pricing Strategies

Why:

- To track product sales by category, solution and model



Sales Summary Report

Start: Jan 01 2014
End: Jan 31 2014

Sales Summary Report For: All Stores /GO/

DOWNLOAD ALL

Sales Summary Jan 01-31, 2014 (Total Sales) DOWNLOAD

Store	Sales	Returns	Net Sales	Units	Returns	Net Units	ASP	Bin %	Return %
CF12001 Minneapolis 1	$12,820	$0	$12,820	4	0	4	$3,205	100%	0%
CF12002 Saint Paul 2	$7,024	$0	$7,024	2	0	2	$3,512	100%	0%
CF12003 Edina	$4,800	$0	$4,800	2	0	2	$2,400	100%	0%
CF12004 Plymouth	$6,080	$0	$6,080	2	0	2	$3,040	100%	0%
TOTAL	$30,724	$0	$30,724	10	0	10	$3,072	100%	0%

Sales By Solution Jan 01-31, 2014 (HA Sales) DOWNLOAD

Solution	Sales	Returns	Net Sales	Units	Returns	Net Units	ASP	Bin %	Return %
SOLUTION ME-1	$17,280	$0	$17,280	6	0	6	$2,880	75%	0%
SOLUTION ME-2	$2,400	$0	$2,400	1	0	1	$2,400	100%	0%
SOLUTION ME-3	$7,000	$0	$7,000	2	0	2	$3,500	100%	0%
SOLUTION ME-4	$4,000	$0	$4,000	1	0	1	$4,000	0%	0%
TOTAL	$30,680	$0	$30,680	10	0	10	$3,072	100%	0%

Sales By Model Jan 01-31, 2014 (HA Sales) DOWNLOAD

Model	Sales	Returns	Net Sales	Units	Returns	Net Units	ASP	Bin %	Return %
ME-4 SOLTN ME108 BTE TN	$4,000	$0	$4,000	1	0	1	$4,000	0%	0%
ME1000 RIC BTE	$4,000	$0	$4,000	1	0	1	$4,000	100%	0%
ME1000 RIC BTE DEMO	$2,400	$0	$2,400	1	0	1	$2,400	0%	0%
ME800 CANAL	$7,000	$0	$7,000	2	0	2	$3,500	100%	0%
ME950 ITE	$6,080	$0	$6,080	2	0	2	$3,040	100%	0%
ME950 XP ITE	$4,800	$0	$4,800	2	0	2	$2,400	100%	0%
Receiver in the canal (RIC) IT	$2,400	$0	$2,400	1	0	1	$2,400	100%	0%
TOTAL	$30,680	$0	$30,680	10	0	10	$3,072	100%	0%

SALES REPORT

What:

There are four sections of the Sales Report:

- Sales
- Invoices
- Appointments
- Appointments by Referral Source

Why and How:

- The **Invoice** section can be used for the **end of day reconciliation**. Click on the detail button to view each transaction by customer and payment type.
- The **Appointment** sections can be used to track the number of hearing evaluations have been scheduled in the past or in the future.
- This report can be viewed by day, week, month, quarter, or year-to-date (YTD) for a specific date range by selecting **custom** in the period drop-down list

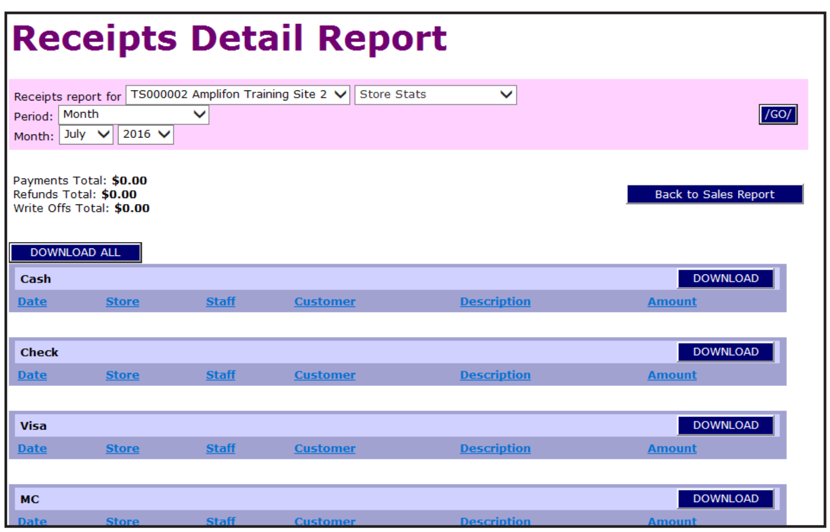
Invoices DETAILS DOWNLOAD

Payments	Week 1 Jun 26 - Jul 02	Week 2 Jul 03-09	Week 3 Jul 10-16	Week 4 Jul 17-23	Week 5 Jul 24-30	Week 6 Jul 31 - Aug 06	Total
cash	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
check	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
visa	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
mc	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
amex	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
discover	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
care credit	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
sears	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
citi health	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Payments Total	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
HA Deposits	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Refunds	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Write-Offs	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**

Receipt Details Report

From the *Invoices* section of the Sales Report, click the **DETAILS** button to open the ***Receipt Detail Report.*** Transactions are listed by payment type.

Use this report to balance money collected from the patient to the report.



HEARING AID SALES REPORT

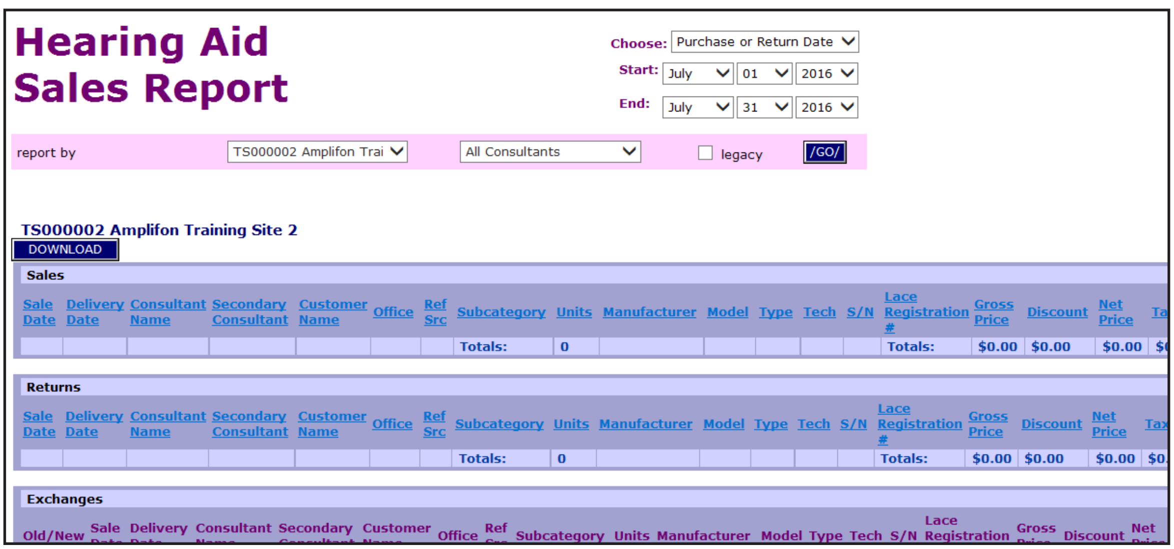
What:

Detailed view of each hearing aid transaction by:

- Sales
- Returns
- Exchanges
- Cancellations
- Replacements

Why:

- Track each hearing aid transaction by:
    - o Location
    - o Consultant
    - o Delivered Sales
    - o Purchase Date
- View transaction detail such as sale date, referral source, model purchased, net price, balance paid and balance due



This report can also be used to track Open House sales/transactions. If a Y is displayed in the Open House column, the purchase was made during an appointment created with the Open House check box selected. Download the report to Excel to filter by the Open House column.

Insurance Payment	Fees	Non-HA	Balance Paid	Balance Due	Last Date Paid	Customer ID	Program	Open House
$0.00	$0.00	$0.00	$0.00	$3,895.00		310		Y
$0.00	$0.00	$70.00	$0.00	$3,465.00		912		
$0.00	$0.00	$0.00	$0.00	$5,800.00		195		

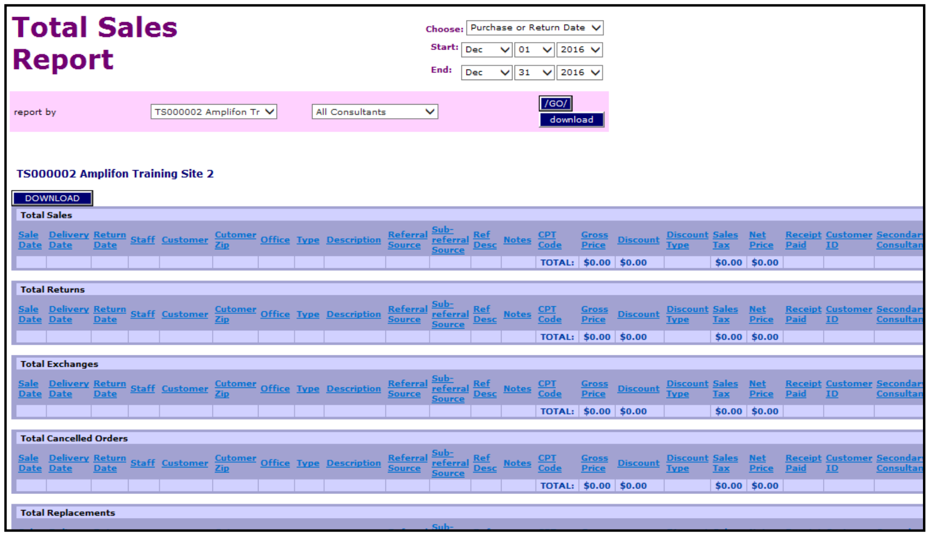
TOTAL SALES REPORT

What:

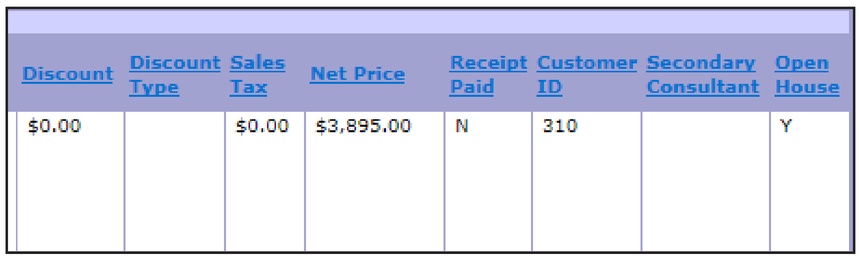
- Detailed summary of all sales transactions
    - o Track battery sales
    - o Track accessory sales
    - o Includes the total of all sales transactions

Why:

- Total sales report details the transactions that feed into the Quick Business totals



This report can also be used to track Open House sales/transactions. If a Y is displayed in the Open House column, the purchase was made during an appointment created with the Open House check box selected. Download the report to Excel to filter by the Open House column.



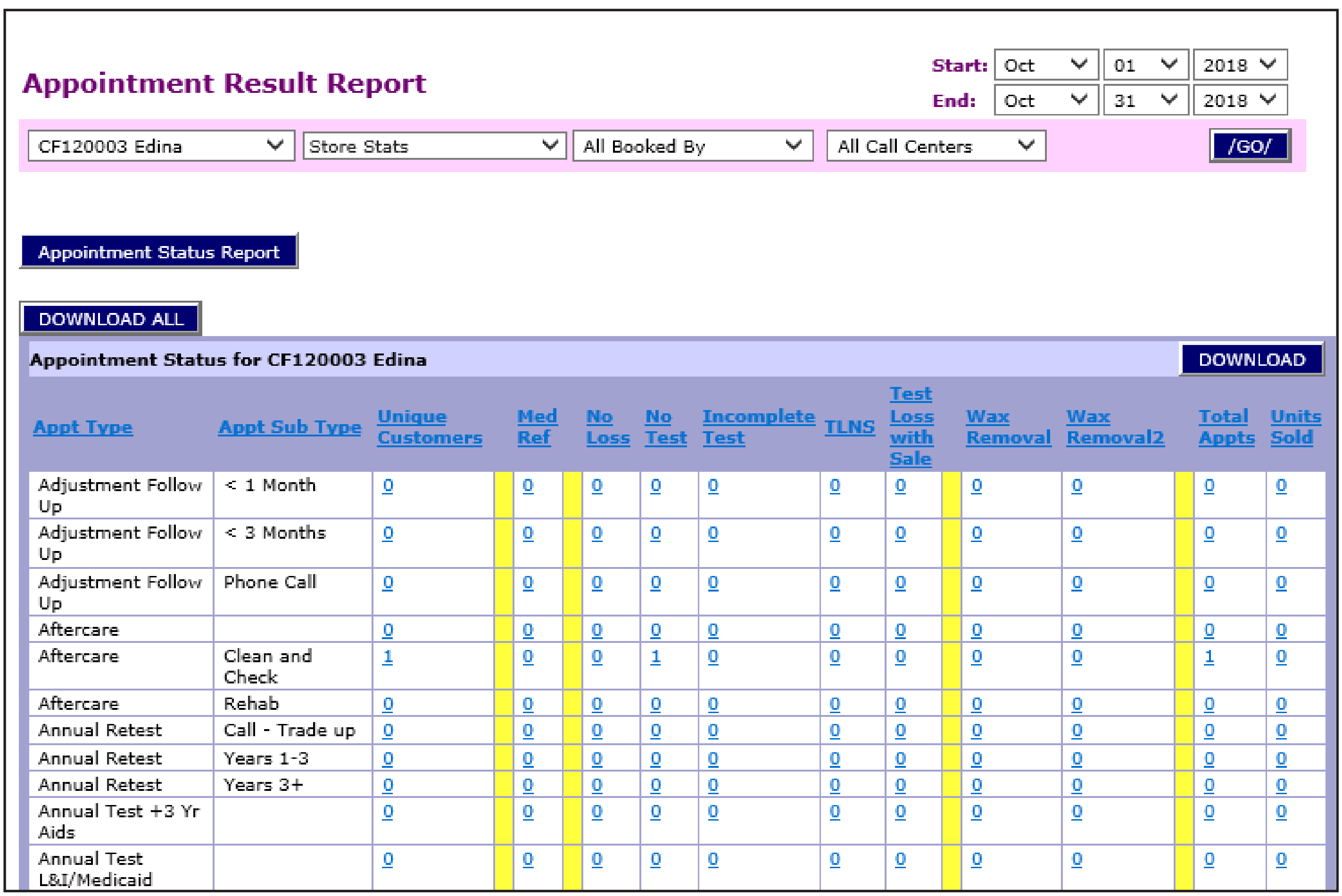
APPOINTMENT STATUS/APPOINTMENT RESULTS REPORT

What:

- A summary of the outcome of completed appointments

Why and How:

- Track results of scheduled appointments
    - Follow up for opportunities to schedule cancelled, no show, and tested-not-sold appointments
- Look for sales opportunities in Appointment Detail view
    - Click on the **total #** of unique customer appointments to open the ***Appointment Detail Report*** (next page)
- **Appointment Status**: Filter the ***count*** of appointments generated by an In Store FOA, Inbound Call Center, or Outbound Call Center
- **Appointment Results**: Filter the ***results*** of appointments generated by an In Store FOA, Inbound Call Center, or Outbound Call Center


Appointment Result Report

Start: Oct 01 2018
End: Oct 31 2018

CF120003 Edina | Store Stats | All Booked By | All Call Centers | /GO/

Appointment Status Report

DOWNLOAD ALL

Appointment Status for CF120003 Edina DOWNLOAD

Appt Type	Appt Sub Type	Unique Customers	Med Ref	No Loss	No Test	Incomplete Test	TLNS	Test Loss with Sale	Wax Removal	Wax Removal2	Total Appts	Units Sold
Adjustment Follow Up	< 1 Month	0	0	0	0	0	0	0	0	0	0	0
Adjustment Follow Up	< 3 Months	0	0	0	0	0	0	0	0	0	0	0
Adjustment Follow Up	Phone Call	0	0	0	0	0	0	0	0	0	0	0
Aftercare		0	0	0	0	0	0	0	0	0	0	0
Aftercare	Clean and Check	1	0	0	1	0	0	0	0	0	1	0
Aftercare	Rehab	0	0	0	0	0	0	0	0	0	0	0
Annual Retest	Call - Trade up	0	0	0	0	0	0	0	0	0	0	0
Annual Retest	Years 1-3	0	0	0	0	0	0	0	0	0	0	0
Annual Retest	Years 3+	0	0	0	0	0	0	0	0	0	0	0
Annual Test +3 Yr Aids		0	0	0	0	0	0	0	0	0	0	0
Annual Test L&I/Medicaid		0	0	0	0	0	0	0	0	0	0	0

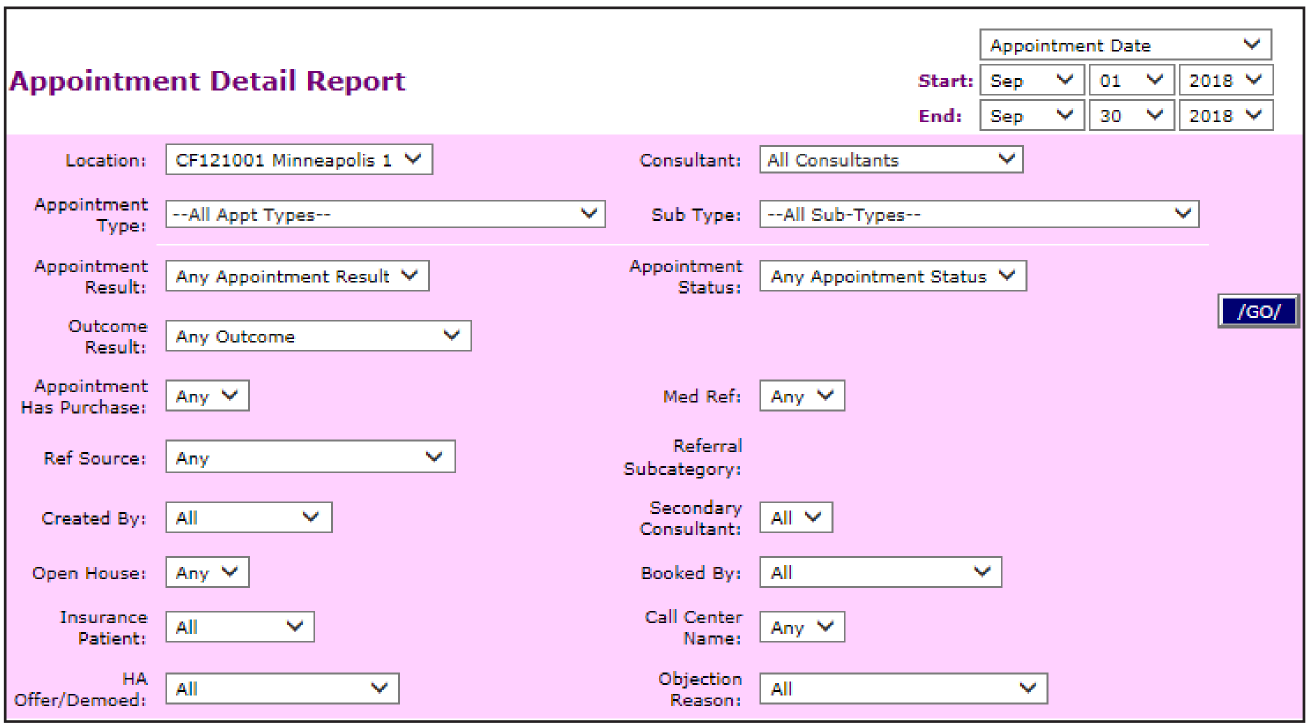
APPOINTMENT DETAIL REPTORT

What:

- This report gives a detailed view of each appointment during the time period selected, with the ability to filter by appointment outcomes

How:

- The first section shows the selection criteria for the results of the appointment. Enter the data rate and then the outome selections you would like to track.
- The columns in the second section display the information selection filtered at the top of the report.
- Click the **/GO/** button to generate the report



What:

A report to filter criteria and track the results of appointments from the data entered in the appointment outcome. The report also identifies whether a patient is a sales opportunity. The information tracked in this report includes:

- Appointments with companion present
- Appointments booked by a call center
- Patients' objection reasons to purchase.
- Price and product demoed
- Open House appointments
- Appointment creation date
- Status updated on (date)
- Staff

Custom Results

Custom columns can be added to this report by the franchise owner (or staff with appropriate privileges in Sycle) to track additional data that is not automatically tracked by Sycle.

Data that feeds into the custom column is added when appointment outcomes are added.

To add a custom column

1. Go to **Admin** section
2. Scroll down to **Custom Appointment Results**
3. Click **Add Another Type**
4. Follow **on-screen prompts**
5. Click **Save**.

REFERRALS REPORT

The results tracked in the ***Referral*** report are dependent upon the office staff's diligence in entering the correct Referral Source and Subcategory. To access the report, complete the following steps:

1. Go to **Reports / Referrals Report**
2. Filter by **date range** and **store**
3. In the report, click on the **left column** for the type of referral source
4. View the appointments generated by each subcategory, or promotion, for the type of marketing (shown at right)
5. The ***referral source detail*** screens opens to show appointments generated by each promotion (shown below)

Aftercare	103
Billboard	0
Consumer Referral	1
Direct Mail	10
Grass Roots	2
Location / Signage	2
Magazine	0
Managed Care	0
Newspaper	3

2016 JULY OPEN HOUSE $10Red Lobster/BOGO	4
Public Notice/ $25 Red Lobster JULY 2016	3
USE IT OR LOSE IT JUNE 2016	1
letter sent to come in.	0
Total	**9**

Tracking Sales Revenue by Promotion

1. Click the **Sales by Referral Source** button
2. Select the **Referral Source** to track
3. A *sales summary* displays at the bottom of the screen. Click the **DOWNLOAD** button to export the data to Excel.

Direct Mail summary					DOWNLOAD
Subcategory	Avg Sale Price	Gross	Discount	Net	Units
Dollars and Sense MAY 2016	$2,200.00	$6,990.00	$2,590.00	$4,400.00	2
Open House- FEB 2016- Genius Demo 50% off/vo	$2,697.58	$38,740.00	$6,369.00	$32,371.00	12

APPOINTMENTS REPORT

What:

Daily count of appointments by appointment type

Why:

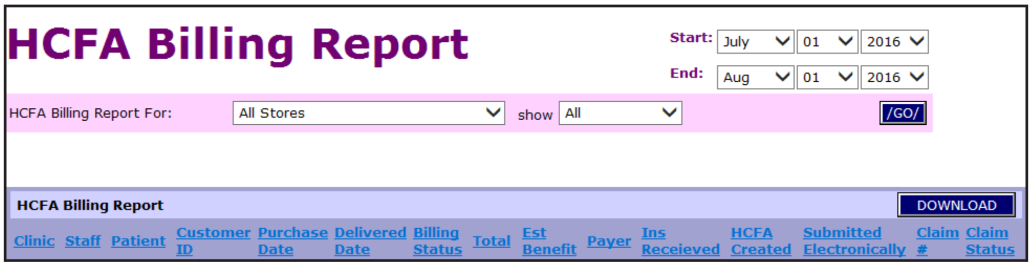
Track number of appointments on the schedule for the week

Appointments for TS000002 Amplifon Training Site 2 DOWNLOAD

Appointments	Sun Jul 31st	Mon Aug 1st	Tue Aug 2nd	Wed Aug 3rd	Thu Aug 4th	Fri Aug 5th	Sat Aug 6th	Total	%
Annual Test +3 Yr Aids	0	0	0	0	0	0	0	0	0%
Annual Test L&I/Medicaid	0	0	0	0	0	0	0	0	0%
Annual Test Less Than 3 Yr Aids	0	0	0	0	0	0	0	0	0%
Clean & Service	0	0	0	0	0	0	0	0	0%
Follow-up Care	0	0	0	0	0	0	0	0	0%
HAE/Consultation	0	0	0	0	0	0	0	0	0%
HearPO Eval/Consultation	0	0	0	0	0	0	0	0	0%

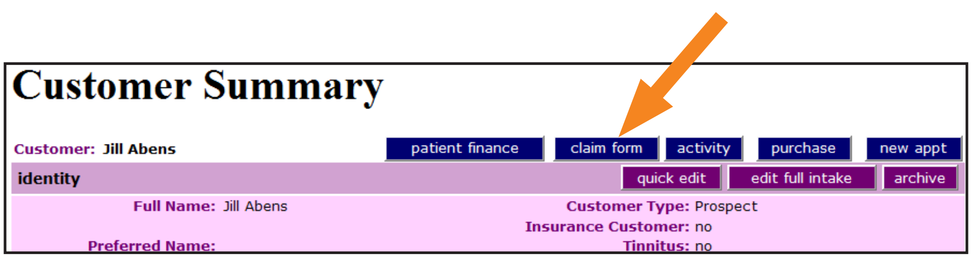
HCFA BILLING REPORT

The HCFA billing report displays the data entered for each patient claim form.



HCFA Forms

To complete a HCFA form (insurance filing), go to the **Customer Summary** for the patient. This form will auto populate the customer demographic information as well as the Primary Insurance Company information if it was added to the Customer Summary. Click the **claim form** button to auto populate the customer demographics and complete the form. Then, print the form and send it to insurance company.



INTAKE REPORT

What:

Records count of prospects with appointments generated, that have been entered into the database during the time period

Why:

- Track number of prospects entered into the database who scheduled an appointment (can filter by date range)
- Track referral source by prospect entered

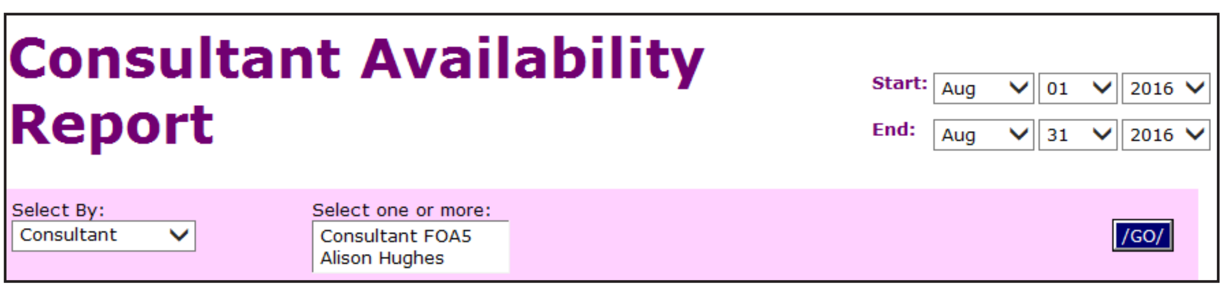
CONSULTANT AVAILABILITY REPORT

What:

Shows the list of dates when the hearing care professional (consultant) is available for a given time period

Why:

Provides a quick reference when working with patient to schedule appointment



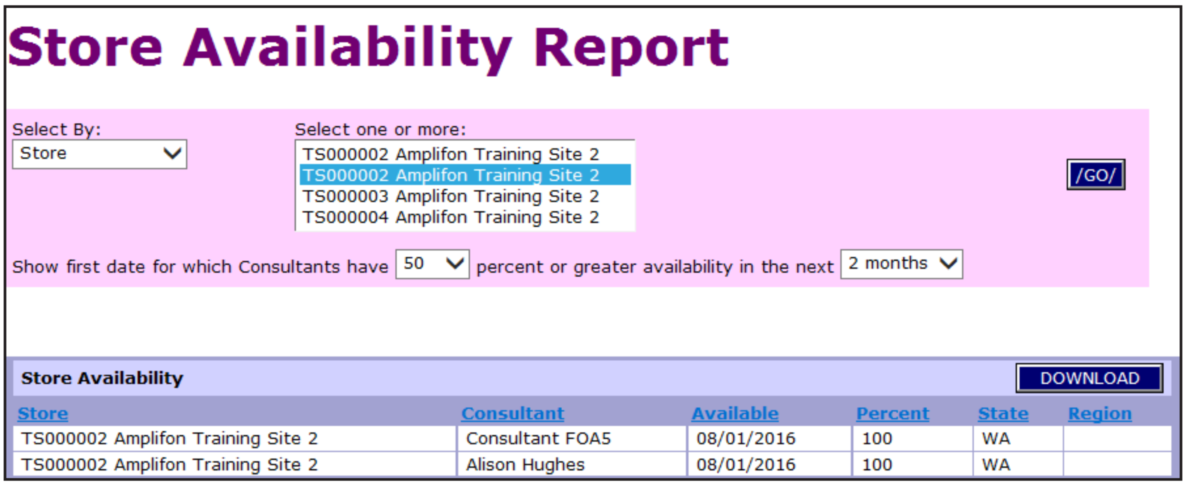
STORE AVAILABILITY REPORT

What:

Shows list of offices that have a percentage selected of appointments available on the schedule during the time period selected

Why:

Track offices that have high % of open appointments on the schedule during a time period or a quick reference to track availability of the office schedule



USING PICKUP TO VIEW A REPORT

What:

Larger reports that need time to populate can be picked up approximately 10-15 minutes after being run

How:

1. From the *Reports* tab, click the **pickup** box

quick business	sales summary	sales	HA sales	total sales	open invoices	aging	inventory	cash flow	referrals	marketing	appts	hcfa status	hcfa billing	intake	prov avail	clinic avail	pickup

2. The ***pickup*** screen opens. When the report is ready to view, the following options will be available:
   - **Excel:** to view or filter the report
   - **Delete:** remove the report from pickup
   - **Text:** will open in Excel

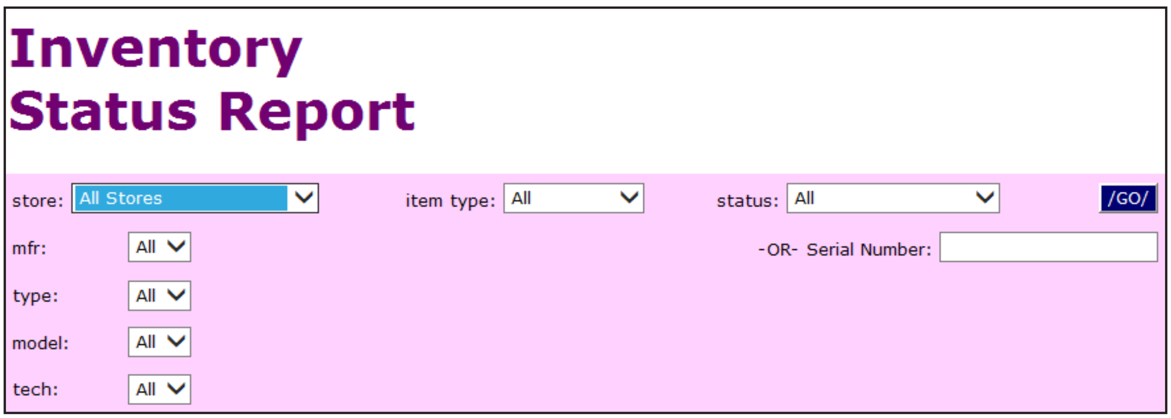
reports

id	name	submitted	expires	status	progress	action
3475	Marketing Report current_equipment	07/27/2016 11:30 am	08/06/2016 11:32 am	completed	100%	excel || delete || text - Current Equipment_ALL text - Excel File

INVENTORY STATUS REPORT

The results of this report can be filtered by:

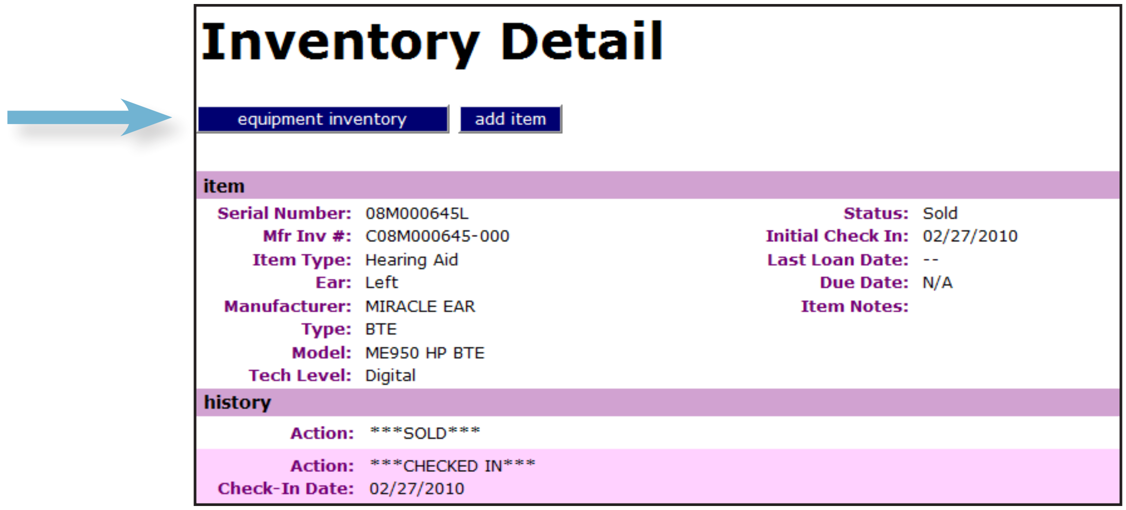
- Store
- Item Type (hearing aid, remote, or other)
- Inventory Status
- Serial Number (search field)
- Manufacturer
- Type of Product (technology category describing how it is worn)
- Model (product type and solution combined, describing how it is worn and the pricing category)
- Technology Level



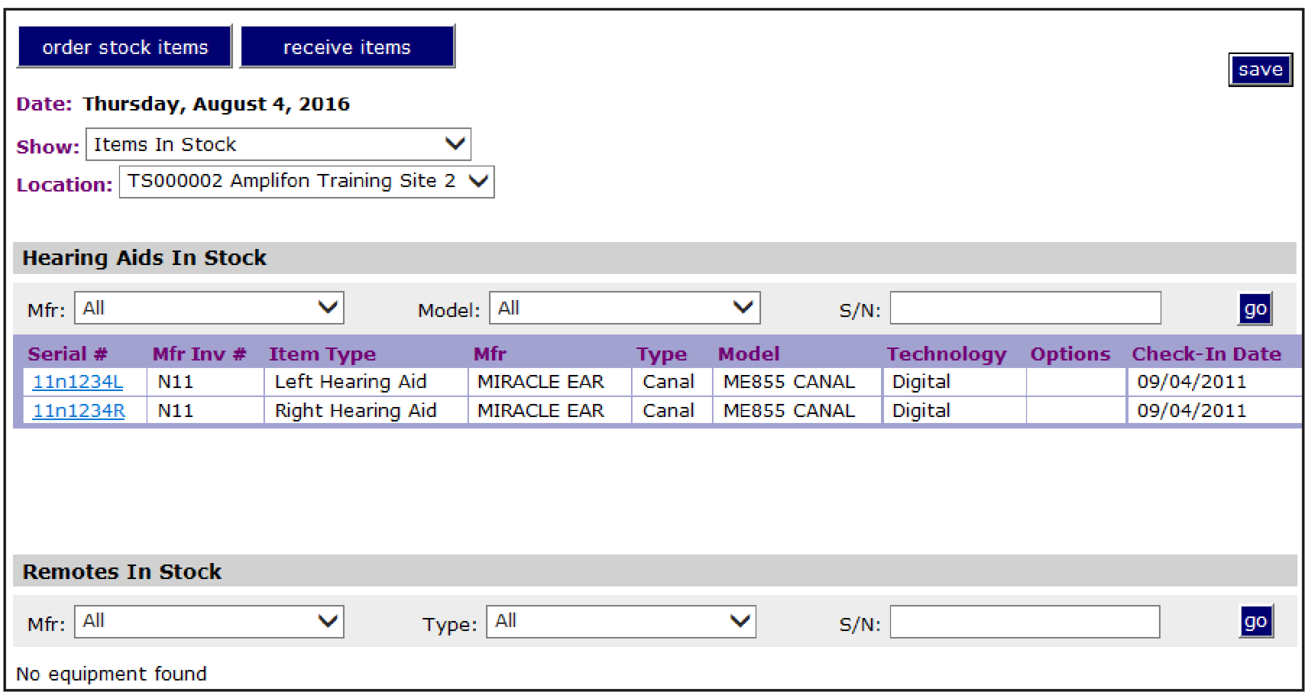
A list of products by status displays (unless a specific serial number was searched for). Click on a **serial number** to open the ***Inventory Detail*** screen. (shown on next page)

Inventory In Stock DOWNLOAD

Store	Item Type	S/N	Manufacturer	Type	Model	Technology	Check-in Date	Status
TS000002 Amplifon Training Site 2	Hearing Aid	08M000645L	MIRACLE EAR	BTE	ME950 HP BTE	Digital	02/27/2010	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	08M000645R	MIRACLE EAR	BTE	ME950 HP BTE	Digital	02/27/2010	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	09MO32983L	MIRACLE EAR	BTE	ME750 OP BTE DEMO	Digital	09/30/2009	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	111222	MIRACLE EAR	BTE	ME800 S BTE	Digital	09/04/2011	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	111223	MIRACLE EAR	BTE	ME800 S BTE	Digital	09/04/2011	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	11n1234L	MIRACLE EAR	Canal	ME855 CANAL	Digital	09/04/2011	In Stock
TS000002 Amplifon Training Site 2	Hearing Aid	11n1234R	MIRACLE EAR	Canal	ME855 CANAL	Digital	09/04/2011	In Stock
TS000002 Amplifon Training Site 2	Hearing Aid	123456	MIRACLE EAR	BTE	ME800 S BTE	Digital	08/06/2009	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	123457	MIRACLE EAR	BTE	ME800 S BTE	Digital	08/06/2009	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	456122	MIRACLE EAR	BTE	ME850 SP BTE	Digital	08/07/2009	Sold
TS000002 Amplifon Training Site 2	Hearing Aid	456123	MIRACLE EAR	BTE	ME800 SP BTE	Digital	08/07/2009	Sold



From the Inventory Detail sreen in the report, you can receive the purchase order or enter a stock item for the AP/PO version. Click on the **equipment inventory** button from the Inventory Detail screen. Add an item if needed.



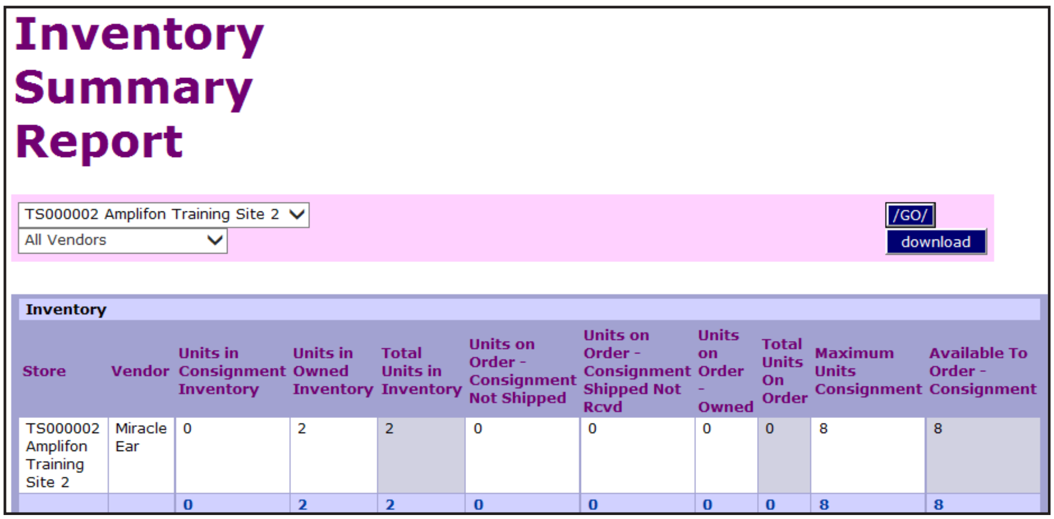
INVENTORY SUMMARY REPORT

What:

The Inventory Summary report shows the unit count in consignment inventory and in owned inventory

Why:

To track the number of consignment stock units and owned stock on hand



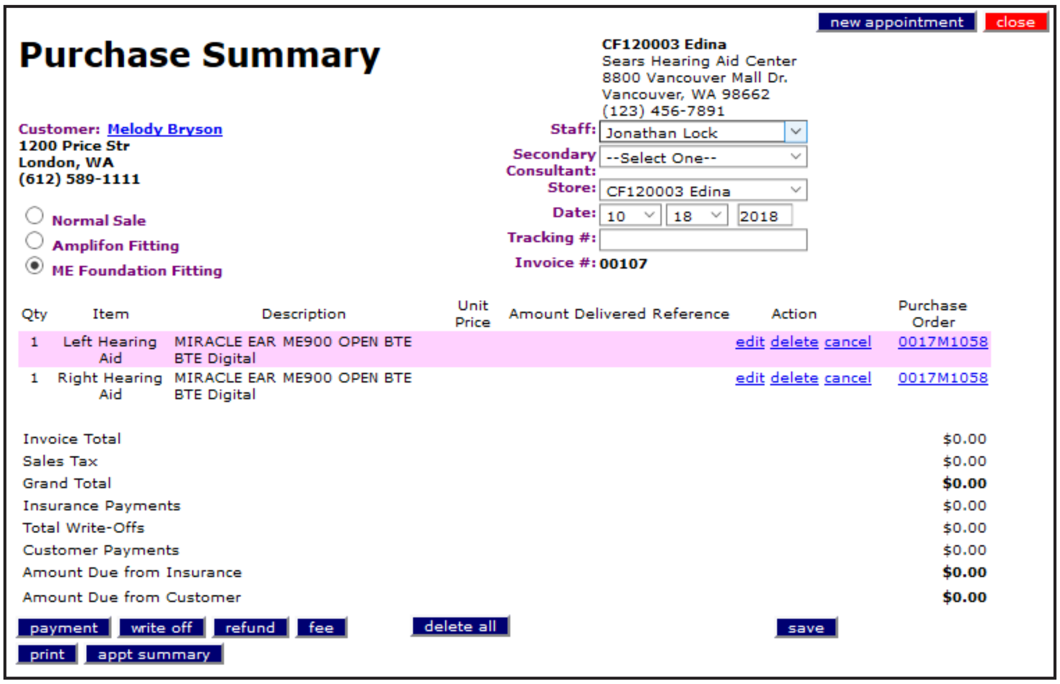
Store	Vendor	Units in Consignment Inventory	Units in Owned Inventory	Total Units in Inventory	Units on Order - Consignment Not Shipped	Units on Order - Consignment Shipped Not Rcvd	Units on Order - Owned	Total Units On Order	Maximum Units Consignment	Available To Order - Consignment
TS000002 Amplifon Training Site 2	Miracle Ear	0	2	2	0	0	0	0	8	8
		0	2	2	0	0	0	0	8	8

Miracle-Ear Foundation Donations

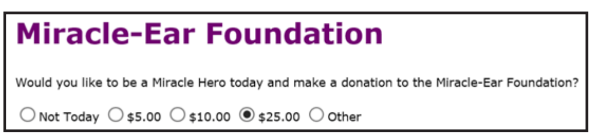
A donation to the Miracle-Ear Foundation can be added to another purchase or simply created as a donation by itself. A Purchase Summary should always be entered into Sycle for a ME foundation donation to record the transaction. Donation receipts can be printed from the purchase summary.

MIRACLE-EAR FOUNDATION DONATION WITH HEARING AID PURCHASE

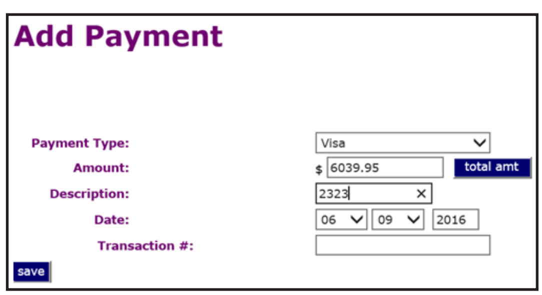
In this example, a customer has purchased a hearing aid and payment is ready to be taken in Sycle.net.



1. From the Purchase Summary, click the **payment** button. A new window opens asking if the patient would like to make a donation to the Miracle-Ear Foundation. Select the appropriate **radio button**.

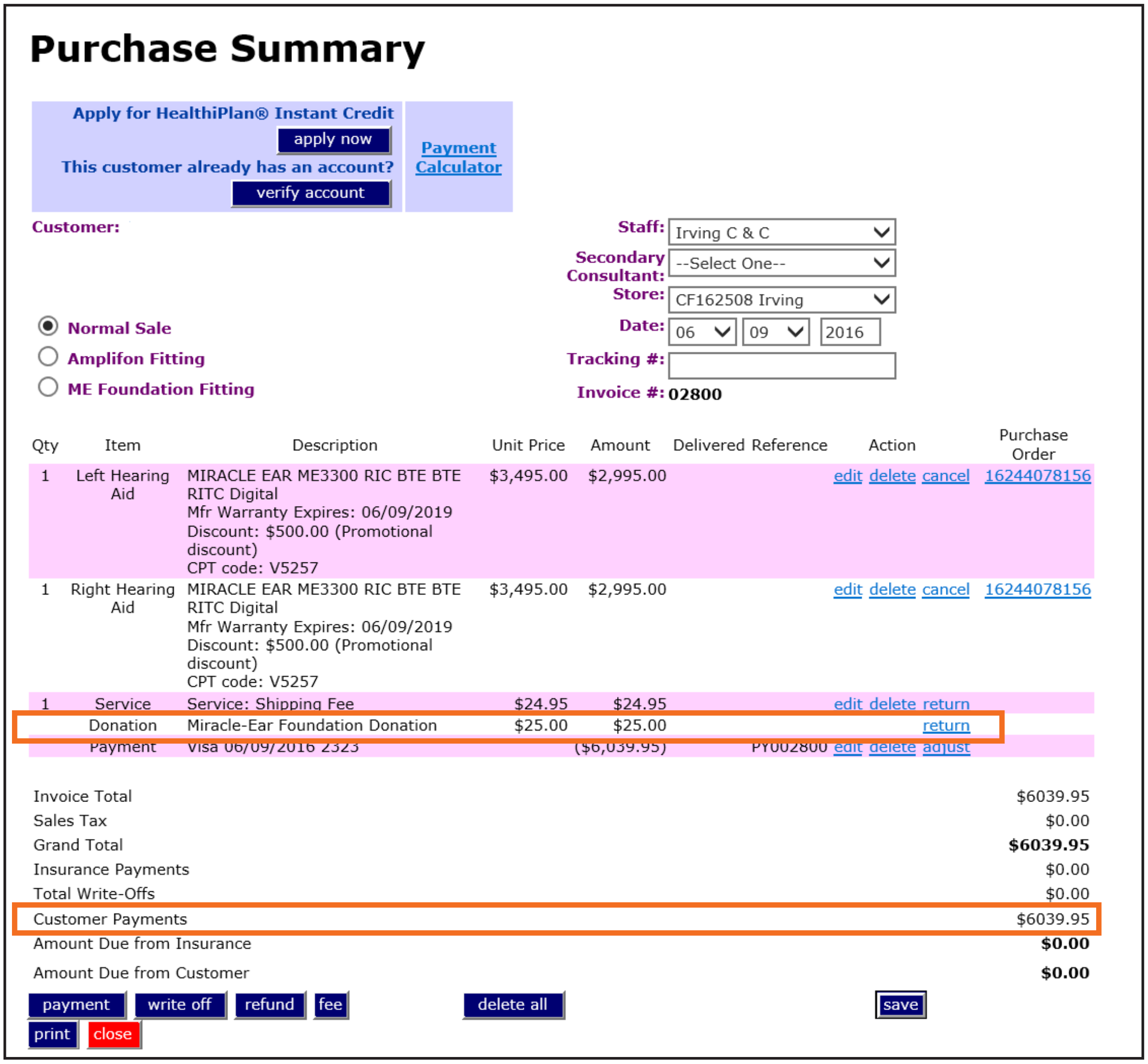


2. Click **add payment**. Select the **Payment Type** from the drop-down menu, then enter the **dollar amount (donation + purchase)** in the *Amount* field.



> **Note**: ask your franchise owner/manager what information should be included in the Description field.
> (ex. Invoice Number, “Donation,” etc.)

The completed invoice shows the donation and the hearing aid purchase combined on the credit card. Notice the zero amount due from the customer.



Purchase Summary

Apply for HealthiPlan® Instant Credit
apply now
This customer already has an account?
verify account
Payment Calculator

Customer:

Staff: Irving C & C
Secondary Consultant: --Select One--
Store: CF162508 Irving
Date: 06 09 2016
Tracking #:
Invoice #: 02800

- Normal Sale
- Amplifon Fitting
- ME Foundation Fitting

Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action	Purchase Order
1	Left Hearing Aid	MIRACLE EAR ME3300 RIC BTE BTE RITC Digital Mfr Warranty Expires: 06/09/2019 Discount: $500.00 (Promotional discount) CPT code: V5257	$3,495.00	$2,995.00			edit delete cancel	16244078156
1	Right Hearing Aid	MIRACLE EAR ME3300 RIC BTE BTE RITC Digital Mfr Warranty Expires: 06/09/2019 Discount: $500.00 (Promotional discount) CPT code: V5257	$3,495.00	$2,995.00			edit delete cancel	16244078156
1	Service	Service: Shipping Fee	$24.95	$24.95			edit delete return	
	Donation	Miracle-Ear Foundation Donation	$25.00	$25.00			return	
	Payment	Visa 06/09/2016 2323		($6,039.95)		PY002800	edit delete adjust	

Invoice Total	$6039.95
Sales Tax	$0.00
Grand Total	**$6039.95**
Insurance Payments	$0.00
Total Write-Offs	$0.00
Customer Payments	$6039.95
Amount Due from Insurance	**$0.00**
Amount Due from Customer	**$0.00**

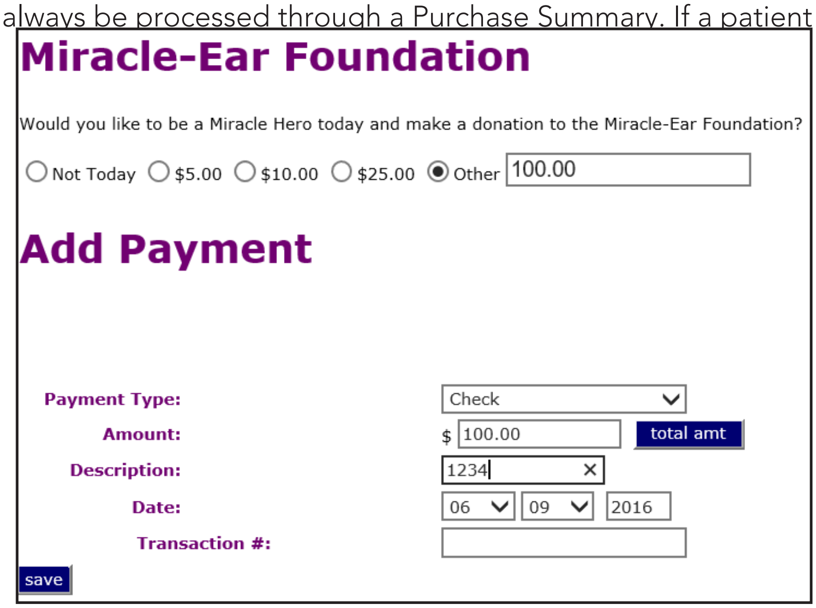
payment | write off | refund | fee | delete all | save
print | close

MIRACLE-EAR FOUNDATION DONATION WITH HEARING AID DEPOSIT

A donation to the Miracle-Ear Foundation can be made at the same time as a hearing aid deposit, as well. The invoice for this type of transaction would show an amount due for the customer, but all other steps in the process are the same as adding a donation to a hearing aid purchase.

STAND-ALONE MIRACLE-EAR FOUNDATION DONATIONS

A donation to the Miracle-Ear Foudation must always be processed through a Purchase Summary. If a patient wishes to make a donation without making an additional purchase, complete the following steps.



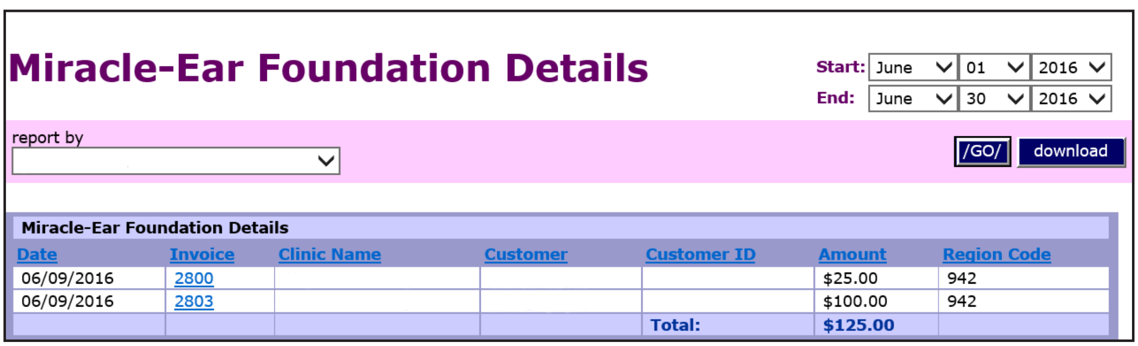
1. Search for the patient in using the **search** box on the *Appointment* screen.
2. Click the **purchase** button to open a new Purchase Summary.
3. Click the **payment** button.
4. A new window opens asking if the patient would like to make a donation to the Miracle-Ear Foundation. Select the appropriate **radio button**.
5. Add the **payment type** and **amount**, then click **save**.

MIRACLE-EAR FOUNDATION DETAIL REPORT

The Miracle-Ear Foundation detail report shows all donations collected from patients. To pull the report:

1. Select the **store/s** and **date range**
2. Click **Go**

Click the invoice number to view the transaction where the donation occurred.



Tips to Remember:

- When collecting a payment from the patient, add the amount of the donation to the amount for any other purchases made at that time. This may be important when financing the balance of an order. If the additional donation amount is not collected, the donation could potentially be included in the balance that is financed.
- Make sure to process the payments made for the ME Foundation with any credit cards, checks and cash so that it is deposited into the business bank accounts.
- Reconcile reporting with ME Foundation donations collected in the ME Foundation Detail Report.

Amplifon Hearing Health Care Sales

Referrals from Amplifon Hearing Health Care are entered into the Amplifon Lite version of Sycle.

Amplifon Lite User Guide

The Amplifon Lite system was created to give you easy access to view Amplifon referrals, create appointments and enter hearing aid sales for patients referred to your location. This User Guide will walk you through the steps necessary to process all Amplifon sales and ensure a timely reimbursement and accurate reports.

Overview of the steps to process Amplifon Referrals and Sales

Referral Process

1. Patient contacts Amplifon to find the nearest location. The Amplifon Patient Care Advocate registers the patient into the Amplifon Lite system and the clinic is notified of the referral via email.
2. Provider logs into Amplifon Lite at www.myamplifonusa.com to access patient information on the dashboard.
3. 3. Provider or Front Office Assistant contacts the Amplifon patient to make an appointment.

Sales Entry Process

4. Patient comes in for initial appointment and hearing instruments are recommended.
5. Provider logs into the Amplifon Lite to enter the Appointment Outcome in the Referrals Tab.
6. Provider orders the hearing aids through the manufacturer using the Process Sales PO# and the Amplifon Bill-To # listed in the Amplifon FAQ document on Page 6.
7. Provider receives the hearing aids from the manufacturer and makes an appointment for the fitting.
8. Patient is fit with hearing aids and a payment is collected from the patient by the location.
9. Provider logs into Amplifon Lite Dashboard to complete the hearing aid sale, in the Referrals tab.
10. Once sale and payment is processed, print the Receipt of Delivery document.
11. Provider and Patient sign the Receipt of Delivery document.
12. Provider faxes the completed Receipt of Delivery document with manufacturer packing slip to 1-888-844-5713.
13. Review the processed sales in the Amplifon Lite system.

Please contact Amplifon Client Services at **1-800-920-4327** if you have any questions regarding the Amplifon Process.

ENTERING AN AMPLIFON HEARING HEALTH CARE APPOINTMENT

When entering an appointment for an Amplifon Hearing Health Care patient, always select the Amplifon button in the top left corner.

If a purchase is made, the sale should be entered into the Amplifon Lite Sycle system. It should also be entered into the patient's appointment outcome.

When you click the Amplifon button, the sale amount will default to $0. This eliminates overstating the hearing aid revenue in the Miracle-Ear system.

Once the fee is received from Amplifon Hearing Health Care:

1. Enter the **fee amount** into Sycle as a ***service fee*** (refer to page 25 for instructions on entering a non-hearing aid purchase)
2. Enter the hearing aid sale into Sycle as a **zero dollar transaction**
   Note: Never enter the sale with a dollar amount as this will affect the location's total revenue
3. Check the **AHHC box** at the top left of the purchase to enter the sale without affecting the key prformance indicators

Entering the hearing aid sale populates the ***current equipment*** field in the Customer Summary for future reference

For more information, review the Amplifon Lite Quick Guide.

Quickbooks Sync Tool

Quickbook Sync, often called QBSync, allows for all income financial entries in Sycle.net to be transferred to the QuickBooks company file with a click, including:

- Customer Demographics
- Sales Transactions
- Sales Tax Liability
- Accounts Receivables
- Returns
- Credits
- Exchanges
- Write-Offs
- Edits to a previously imported transaction

QuickBooks users are able to save time and money quickly entering sales into Quickbooks and also access reporting features within QuickBooks such as AR reports and P&L statements.

Once the pending transactions have been previewed and approved, the final synchronization can be processed. To sync Sycle.net transactions with QuickBooks:

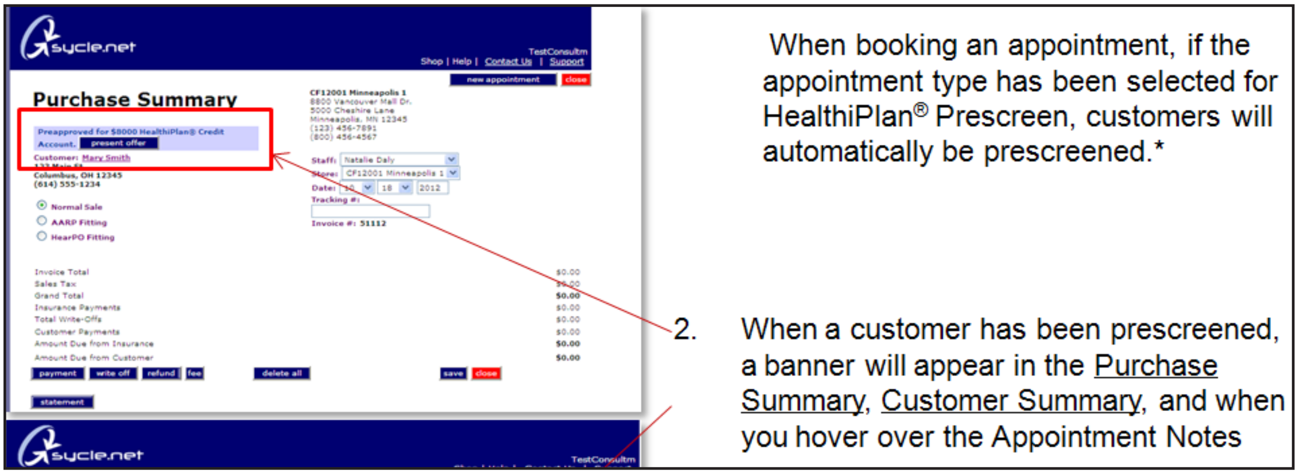
1. Log into QuickBooks as an Admin user and open the **company file**
2. Log into Sycle.net with the **QBSync user account**
3. Open the **sync utility**
4. Log into the ***QBSync utility*** using the **QBSync user account**
5. To perform the sync, click the **Synchronize** button

For more information, review the QB Sync Manual.

Entering a Healthiplan Sale

Once the Healthiplan appointment types have been preselected, a prescreen amount will generate automatically

Prior to the customer arriving for the appointment, hover over the appointment notes to see the prescreen financing amount. Inform the Hearing Care Professional.



ACCEPTING A PRESCREEN OFFER

After being prescreened, the patient must be presented with their prescreen offer, AND the ***Accept Offer*** or ***Decline Offer*** button must be chosen. If *Accept Offer* is chosen, the patient will receive a welcome letter in 7-10 days. If *Decline Offer* is chosen, no letter will be sent. If neither *Accept Offer* nor *Decline Offer* are chosen, a prescreen offer letter will be sent within 45 days of the appointment. Follow these steps to accept or decline a patient's prescreen offer.

1. Click the **Present Offer** button on the Purchase Summary page to open the Preapproved screen
2. From the Preapproved screen, **print the disclosures** and **hand them to the patient**. At this time, let the patient know that he or she has been preapproved for a HealthiPlan® Credit Account, and ask the patient if he or she would like to accept the offer.
3. If the patient is not interested, click **Decline Offer**. The offer will remain available for 120 days.
4. If the patient is interested, click **Disclosures Provided**, then click **Accept Offer**.
5. Enter the **payment amount,** and in the payment type drop-down menu select **Healthiplan**
6. Click **save**

For assistance with this process, contact the computer services team.

Also see the HealthiPlan User Guide.