

Sycle Activity Workbook

System Functionality

Patient Database,
Schedule Management
& Purchase Functionality



TABLE OF CONTENTS

INTRODUCTION.....	3
CONFIDENTIAL: TEST SITE LOGIN INFORMATION	4
FIND YOUR LOGIN INFORMATION	4
ACTIVITY CHECKLIST	5
SEARCHING FOR A PATIENT - ACTIVITY 1.....	6
QUICK ADD A PATIENT - ACTIVITY 2	7
ADDING A NEW PATIENT - ACTIVITY 3	8
SCHEDULING AN APPOINTMENT - ACTIVITY 4.....	10
APPOINTMENT FLAG COLOR KEY	12
RESCHEDULING AN APPOINTMENT - ACTIVITY 5	13
CONFIRMING AN APPOINTMENT - ACTIVITY 6	16
BLOCKING TIME ON THE CALENDAR - ACTIVITY 7	17
SCHEDULE A BLOCK TIME	17
EDIT A BLOCK TIME	19
DELETE A BLOCK TIME	21
ENTERING AN APPOINTMENT OUTCOME - ACTIVITY 8	22
HEARING AID PURCHASE - ACTIVITY 9.....	24
CHECKING IN (RECEIVING) A HEARING AID - ACTIVITY 10.....	27
DELIVERING A HEARING AID - ACTIVITY 11	29
SELLING HEARING AID BATTERIES - ACTIVITY 12.....	30
EXCHANGING HEARING AIDS - ACTIVITY 13.....	32
RETURNING HEARING AIDS - ACTIVITY 14.....	35
TRANSFERRING HEARING AIDS - ACTIVITY 15	37
ENTERING A COMPETITIVE USER - ACTIVITY 16.....	38
ARCHIVING PATIENTS - ACTIVITY 17	40
UNARCHIVING A PATIENT - ACTIVITY 18.....	42
SELLING HEARING AIDS FROM STOCK - ACTIVITY 19	43
ENTERING A REPAIR - ACTIVITY 20.....	45
RECEIVING AND DELIVERING A REPAIR	47
PURCHASE ORDERS FOR CUSTOM ORDERS - ACTIVITY 21	49
RECEIVING A PURCHASE ORDER	51
DELIVERING A CUSTOM ORDER - ACTIVITY 22.....	52
PURCHASE ORDERS FOR RETURNS AND EXCHANGES - ACTIVITY 23.....	53
STOCK HEARING AIDS AND REMOTES - ACTIVITY 24	55
RECEIVING STOCK ORDERS.....	57
COMPLETE LIST OF APPOINTMENT TYPES AND SUB TYPES.....	59
APPOINTMENT TYPES REFERENCE SHEET.....	70

INTRODUCTION

Welcome to the Sycle Activity Workbook!

This guide was developed as a tool to practice the functions of Sycle used in your role as a Front Office Associate. Perfecting your skills will aid in your ability to provide the best experience to each of your patients. You will learn to enter and schedule new patients into the database, update existing patient information, enter a hearing aid purchase summary, and lots more!

Each activity is designed using the most efficient and effective workflows that will make your job easier and ensure you do not miss critical steps.

You will log-in to the [Sycle.Net training site](#) using information on the Activity Checklist located on the next page. We recommend repeating each activity 5 times to ensure you are confident using Sycle.Net in your daily interactions with your customers.



CONFIDENTIAL: TEST SITE LOGIN INFORMATION

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

Eastern US

Includes Puerto Rico

Staff Login Info

Username: miracleear14
Password: Amp_Testing01

Admin Login Info

Username: miracleear2
Password: Welcome1

Northern Region

Includes AK & HI

Select either of the following locations:

- 01
- 02

Southern Region

Select either of the following locations:

- 03
- 04



Northern Region

Select either of the following locations:

- Edina
- Plymouth

Southern Region

Select either of the following locations:

- Minneapolis
- St. Paul

ACTIVITY CHECKLIST

	Activity	#1	#2	#3	#4	#5
1	Searching for a Patient					
2	Quick adding a Patient					
3	Adding a New Patient					
4	Scheduling an Appointment					
5	Scheduling an Open House Appointment					
6	Rescheduling an Appointment					
7	Confirming an Appointment					
8	Blocking Times on the Calendar					
9	Entering an Appointment Outcome (with purchase)					
10	Entering an Appointment Outcome (without purchase)					
11	Selling a Hearing Aid					
12	Checking In (Receiving) a Hearing Aid					
13	Delivering a Hearing Aid					
14	Selling Hearing Aid Batteries					
15	Exchanging Hearing Aids					
16	Returning Hearing Aids					
17	Transferring Hearing Aids (location to location)					
18	Entering a Competitive User					
19	Archiving a Patient					
20	Unarchiving a Patient					
21	Selling Hearing Aids from Stock					
22	Entering a Repair					
23	Purchase Orders for Custom Orders					
24	Delivering a Custom Order					
25	Purchase Orders for Returns and Exchanges					
26	Stock Hearing Aids and Remotes					

As you complete each activity, track it on the checklist above

SEARCHING FOR A PATIENT - ACTIVITY 1

During this activity, you will determine if a patient or a prospect is currently in the database. Always search Sycle.net to see if the customer has been entered in the system. Doing a thorough search before creating a new record reduces the possibilities of duplicate entries.

Since duplicate entries cause safety, billing, and reporting problems, we must be attentive when searching. Log into the Sycle.net training site and access the Appointments module to begin.



Follow the steps below and check to see if a patient is currently in the database. (I will be using Wayne Jones, but you can make up your own patient name).

Complete this process 4 more times using fictitious names you choose, then record it on your Activity Checklist.

1. Click the **Search** box field
2. Enter the **patient's name**
(we recommend using at least the first 3 letters of the first name and the first 3 letters of the last name)
3. Click **Search**

The screenshot shows the Sycle.net interface with the 'appointments' tab selected. A search bar at the top right contains 'enter customer' and a 'GO!' button. Below the search bar, there are dropdown menus for 'Franchise' (set to 'TS00000 - Amplifon Test 2'), 'show store' (set to 'global search'), 'show consultant' (set to 'All Consultants'), 'find appointment type' (set to '--Selected One--'), and 'length' (set to '0 min'). A date selector shows 'September 23, 2016'. The main area displays a grid of appointment slots from 8:00 am to 11:30 am. Several slots are highlighted with green icons and names: 'Frank Ale Annual Test', 'Timothy James', 'Valisse Walls', and 'customer appt in other store'. At the bottom left of the grid, there is a search input field containing 'Way Jon' with a 'search' button next to it. A yellow arrow points from the text 'Click the Search box field' to this search input field.

4. Review the **Search Results**, which will open in a new window

If your patient has already been entered into Sycle, their name will appear in the search window.

If your patient has NOT been entered into Sycle, their name will NOT appear in the search window. You would then add the patient to the database, which is covered in another activity.

The screenshot shows a search results page with a header 'search instructions' and buttons for 'Way Jon', 'search', 'search all stores', 'Quick Add', 'Add a new customer', 'archive search', and 'advanced search'. The main title is 'Search Result - TS000003 Amplifon Training Site 2, Active Customers'. It displays a table of search results for 'Way Jon' on page 1 of 2, showing 100 results out of 102. The columns are Customer Name, Address, DoB, Phone Number, L, R, and Action. Two rows are shown:

Customer Name	Address	DoB	Phone Number	L	R	Action
Jon Allender	845 Moose Run Lincoln, WA		(777) 666-4444 3333 (home)	●		appt purchase repair notes callback activity
Jonny A App	125 East 2nd Street Erie, PA 16510	05/05/1940	(814) 333-3333 (home)	●		appt purchase repair notes callback activity

QUICK ADD A PATIENT - ACTIVITY 2

When a patient calls for an appointment, but has not visited your location and filled out paperwork, you can use the **Quick Add** activity. Remember: only use Quick Add after you have searched for the patient in the database and have not found them. This prevents duplicate patient entries and maintains data integrity.



Follow the steps below and add the patient who is calling to the database. (I will be using Wayne Jones, but you can make up your own patient name).

Complete this process 4 more times using fictitious names you choose, then record it on your Activity Checklist.

- After searching for a patient's record and not finding them in the database, click **Quick Add**

The screenshot shows a search results page with a pink header bar containing a search input field with 'Way Jon', a 'search' button, a 'search all stores' button, and two links: 'Quick Add' (circled in yellow) and 'Add a new'. Below the header is a link to 'archive search | advanced search'. The main area is titled 'Search Result - TS000003 Amplifon Training Site 2,Active Customers' and displays results for 'Way Jon'. It shows 100 results out of 102. The results table includes columns for Customer Name, Address, DoB, Phone Number, L, R, and Action. Two rows are visible:

Customer Name	Address	DoB	Phone Number	L	R	Action
Jon Allender	845 Moose Run Lincoln, WA		(777) 666-4444 3333 (home)	●		appt purchase repair notes callback activity
Jonny A App	125 East 2nd Street Erie, PA 16510	05/05/1940	(814) 333-3333 (home)	●	●	appt purchase repair notes callback activity

- Enter the **patient's information** (for all practice and training activities enter **fictitious information only** to ensure HIPAA compliance. The Sycle practice site is viewed by many locations and users.)
- Click **Save** when you are done entering the patient information

Note: all fields with an ***** are required

- ✓ Check your work: search for the name of the patient you just entered. If you have entered the patient correctly, the name will display in the search results window.

The screenshot shows the 'quick identity' form for adding a new patient. The top section is labeled 'quick identity' and contains fields for First Name, Middle Initial, Last Name, Customer Type, Gender, Date of Birth, Phone, and Email Address. The bottom section is labeled 'address' and contains fields for Address 1, Address 2, City, State/Province, Zip/Postal Code, and Country. A large yellow arrow points upwards from the 'quick identity' section towards the 'address' section, and a yellow circle highlights the 'SAVE' button in the top right corner of the 'quick identity' section.

ADDING A NEW PATIENT - ACTIVITY 3

In the previous activity you used **Quick Add** to enter basic information about a patient or prospect.

The **New Patient** activity is used when a patient has visited your location and has completed their paperwork. The New Patient activity allows you to enter **all** the information we need in the database at one time.



Follow the steps below and add a new fictitious patient who has just completed their paperwork database. (I will be using Annie Nguyen, but you can make up your own patient name).

Complete this process 4 more times using fictitious names you choose, then record it on your Activity Checklist.

1. Search for the patient to guard against duplicate entries

The screenshot shows the Sycle software interface. On the left, there is a search bar with 'Ann Ngu' typed in, a 'print' button, and a 'search' button. Below the search bar is a pink banner with the text 'Add a new customer'. On the right, there is a calendar for September 2016 showing the days from 1 to 30. To the right of the calendar is a list of appointment slots from 8:00 am to 11:30 am. The list includes entries for 'Justin Smith', 'Tom Jones' (with 'Hearing Evaluation'), and 'Bertha Betterth' (with 'Annual Test').

2. The patient is not in the system. Click **Add New** to create a new patient record in Sycle.

The screenshot shows the Sycle search results page. At the top, there is a search bar with 'Ann Ngu' and buttons for 'search', 'search all stores', 'Quick Add', and 'Add a new'. The 'Add a new' button is highlighted with a yellow circle and arrow. Below the search bar is a pink banner with the text 'archive search | advanced search'. The main area displays a search result for 'Ann Ngu' with the heading 'Search Result - TS000003 Amplifon Training Site 2, Active Customers'. It shows 23 results, with columns for Customer Name, Address, DoB, Phone Number, L, R, and Action. The 'Action' column contains links for each result.

3. Enter all the patient's information and make sure to save the record by clicking Save. (fields with an * are required, but remember that best practice is to collect as much information as possible)

Note: checking the Insurance customer box will populate a message on the schedule on future appointments that this patient has an insurance benefit.

The form includes sections for Identity, Preferred Name, Address, Phone Numbers, Email, Original Referral Source, Store and Staff, Employment and Student Status, Marital Status, Snowbird Address, Privacy, Emergency Contact, Insurance, Hearing Loss, Current Equipment, and Custom Groups. Buttons for 'save' and 'close' are at the bottom.

✓ Check your work: search for the name of the patient you just entered. If you have entered the patient correctly, the name will display in the search results window.

SCHEDULING AN APPOINTMENT - ACTIVITY 4

An important part of your job role is to schedule appointments for prospects and patients. Always search the database and add the patient if they are not yet in the Sycle.Net system



Follow the steps below and schedule an appointment for your patient. (I will be using Annie Nguyen, but you can make up your own patient name).

Complete this process 4 more times using fictitious names you choose, then record it on your Activity Checklist.

1. Locate the **patient's record** (if the patient is not in the system, add them using the steps outlined in the previous activities)
2. Click the blue **Appt** hyperlink to begin scheduling

Customer Name Address DoB Phone Number L R Action
Annie Nguyen 123 Main Street (763) 555-1212 (home)
Maple Grove, MN 55311 [appt](#) [purchase](#) [repair](#) [notes](#) [callback](#) [activity](#)

3. The Sycle system will close the search window and bring you back to the Appointments screen. Select the **date** and **time** you would like to schedule your patient.

show store: [global search](#) show consultant: find appointment type: length:
TS000003 Amplifon Training Site 2 All Consultants -- Select One -- 15 min [find next](#)

<< [Sep](#) >> 2016
Sun Mon Tue Wed Thu Fri Sat
4 5 6 7 8 9 10
11 12 13 14 15 16 17
18 19 20 21 22 23 24
25 **-26-** 27 28 29 30
[Week at a glance](#) [Month at a glance](#) Today
Printable Schedule: All Consultants [print](#)

enter customer [Add a new customer](#)

Tuesday, September 27 call list Call List Qty.
Callbacks 67

Scheduling appointment for Annie Nguyen: Please select a date and time

[cancel](#) [Justin Smith](#)
▼ Scroll ▲
8:00 am
8:15 am
8:30 am
8:45 am
9:00 am
9:15 am
9:30 am
9:45 am
10:00 am
10:15 am
10:30 am
10:45 am
11:00 am
11:15 am
11:30 am
11:45 am
12:00 pm

Tom Jones Hearing Evaluation
Bertha Betterth Annual Test

4. Enter the following

- Appointment Type and Sub Type (click [here](#) for a reference sheet)
- Appointment Notes (always begin with the date and your initials)
- Referral Source
- Referral Subcategory
- Appointment Companion (If yes is selected, enter additional required information)

5. Click **Continue**

New Appointment

Customer: Annie Nguyen **continue**

Preferred Name:

Next Appointment Date:

Normal Appointment
 Amplifon Appointment
 ME Foundation Appointment

identity

Address: 123 5th Street	Customer Type: Current
Minneapolis, WA MN	Phone Number: (612) 763-6518 (cell)
Last Hearing Test Date: <input type="text"/>	E-mail Address: annie@email.com
Last HA Purchase Date: <input type="text"/>	

appointment

Store: CF120003 Edina	Open House: <input type="checkbox"/>
Consultant: Terry Smith	Date: 09/18/18
Secondary Consultant: <input type="text"/> [?]	Time: 2:45 pm
Type: Annual Retest	Length: 60 minutes
Sub Type: Years 1-3	Status: Not Confirmed
CRM Offer Presented: <input type="text"/>	Prior Auth. #: <input type="text"/>
Referral Source: Radio	Prior Auth Exp: <input type="text"/> m <input type="text"/> d <input type="text"/> y
Referral Subcategory: <input type="text"/>	Appointment At: Store
Description: <input type="text"/>	
Notes: 9/18 MS: Customer having trouble hearing the TV	
Recurrence: Repeat this appointment: <input type="text"/> --No Recurrence--	
Repeat: <input type="text"/> times (not including this one)	
OR Until: <input type="text"/> m <input type="text"/> d <input type="text"/> y (max 200 recurrences)	

appointment companion

*Will be accompanied on this appointment: Yes

Relation: Live-in Companion	Other Description: <input type="text"/>
First Name: John	
Middle Initial: <input type="text"/>	
Last Name: Anderson	

continue **close**

Note: if the patient's email address is missing or invalid on the customer summary, a warning will appear when you click continue. Update the email address to continue.

6. Confirm the information entered, then click **Save**

Appointment Confirmation

Customer: Annie . Nguyen Network: Normal		back save												
Identity Address: 123 5th Street Minneapolis, WA MN														
		Customer Type: Current Phone Number: (612) 763-6518 (cell) E-mail Address: annie@email.com												
Appointment Your appointment is on Tuesday, September 18 at 2:45 pm with Smith at the CF120003 Edina for a Annual Retest. Consultant: Terry Smith Store Address: 8800 Vancouver Mall Dr. Vancouver, WA 98662 Store Phone: (123) 456-7891		Send Confirmation <input type="checkbox"/> Confirmation Email Clinic does not have a valid email address email template												
Waiting List <input type="checkbox"/> Add this customer to the waiting list: <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td>Store</td> <td>CF120003 Edina</td> </tr> <tr> <td>Staff</td> <td>Terry Smith</td> </tr> <tr> <td>Start Date</td> <td>9 18 2018</td> </tr> <tr> <td>End Date</td> <td>9 18 2018</td> </tr> <tr> <td>Appt Type</td> <td>Annual Retest</td> </tr> <tr> <td>Length</td> <td>60 minutes</td> </tr> </table>			Store	CF120003 Edina	Staff	Terry Smith	Start Date	9 18 2018	End Date	9 18 2018	Appt Type	Annual Retest	Length	60 minutes
Store	CF120003 Edina													
Staff	Terry Smith													
Start Date	9 18 2018													
End Date	9 18 2018													
Appt Type	Annual Retest													
Length	60 minutes													
save		close												

7. The appointment is now visible on the schedule. Hover your mouse over the appointment to review any appointment notes that were added.

Annie Nguyen
Annual Retest (Years 1-3)

Appointment Notes

9/18 MS: Customer having trouble hearing the TV
Insurance Patient.

[Close](#)

Appointment Flag Color Key



RESCHEDULING AN APPOINTMENT - ACTIVITY 5

There will be times you need to reschedule a patient's appointment. Your patient may be unable to make the original time, or perhaps the HCP will be not be available as originally anticipated. Regardless of the reason, rescheduling an appointment is simple and efficient using the steps outlined below.



Follow the steps below and reschedule an appointment for your patient. (I will be using Annie Nguyen, but you can make up your own patient name).

Complete this process 4 more times using fictitious names you choose, then record it on your Activity Checklist.

1. Click on the **patient appointment** you would like to reschedule.

The screenshot shows a calendar for August 2018 with a specific appointment on Wednesday, August 8th highlighted. Below the calendar is a search bar for patients. To the right is a detailed schedule grid for Jonathan Lock and Terry Smith. An orange arrow points from the search bar area towards the schedule grid, indicating where to click on the patient appointment.

2. Select the **Call Initiator** drop down menu.

Selecting a call initiator is required before you can reschedule an appointment.

Choose the **reason for the reschedule**.

This screenshot shows the 'Appointment Summary' window for a patient. It displays appointment details such as Store, Consultant, Type, and Referral Source. A large orange arrow points to the 'Call Initiator' dropdown menu, which is open to show options: '--Select One--', 'Customer called Store', 'Store called Customer', and 'Call Center Outbound'.

3. Click **reschedule**

This screenshot shows a confirmation dialog box with the 'Call Initiator' set to 'Customer called Store'. It includes buttons for 'reschedule' and 'cancel appt.' An orange arrow points to the 'reschedule' button.

- Choose the new **date** from the calendar.
- Click on the new **time** on the schedule.

The screenshot shows a software interface for scheduling appointments. On the left, there is a calendar for August 2018, with the date '7' highlighted. Below the calendar are buttons for 'Printable Schedule', 'All Consultants', 'print', 'enter customer', 'search', and 'Add a new customer'. To the right of the calendar is a 'Rescheduling appointment for Annie Nguyen: Please select a date and time' window. This window contains a 'cancel' button, a scroll bar, and a table with two columns: 'Jonathan Lock' and 'Terry Smith'. The table lists various appointment times and descriptions. A yellow arrow points to the '12:15 pm' slot for 'Joe Rogan HAE/Consultation (Complete HAE)'. Another yellow arrow points to the 'continue' button at the top right of the reschedule window. At the bottom of the main screen, there is a red button labeled 'Tuesday, August 7 Printable Invoices'.

- Make any needed changes in the New Appointment window.

If notes are added, remember to begin with the date and your initials.

Click **continue**.

New Appointment

The screenshot shows the 'New Appointment' form. It has several sections: 'Customer: Annie Nguyen', 'Preferred Name:', 'Next Appointment Date:' (with radio buttons for 'Normal Appointment', 'Amplifon Appointment', and 'ME Foundation Appointment'), and an 'identity' section with fields for 'Address: 123 5th Street Minneapolis, WA MN', 'Customer Type: Current', 'Phone Number: (612) 763-6518 (cell)', 'E-mail Address: annie@email.com', and 'Last HA Purchase Date:'. The 'appointment' section includes fields for 'Store: CF120003 Edina', 'Consultant: Jonathan Lock', 'Secondary Consultant: --Select One--', 'Type: Aftercare', 'Sub Type: Clean and Check', 'CRM Offer Presented: Email - large', 'Referral Source: Radio', 'Referral Subcategory: -- Select One --', 'Description: ', 'Open House: ' (checkbox), 'Date: 08/07/18', 'Time: 12:15 pm', 'Length: 30 minutes', 'Status: Not Confirmed', 'Prior Auth. #: ', 'Prior Auth Exp: m d y', 'Appointment At: Store', and a notes field containing '09-18 MS: Needed to reschedule until after lunch because her daughter needed a babysitter Insurance Patient.' The 'Recurrence: none' section and the 'appointment companion' section (with fields for Relation: 'Live-in Companion', First Name: 'John', Middle Initial: ' ', Last Name: 'Anderson', Other Description: '') are also visible. A yellow arrow points to the 'continue' button at the top right of the form.

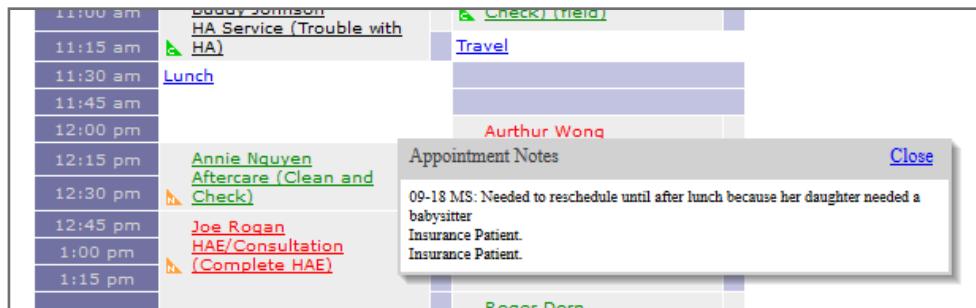
7. Review the Appointment Confirmation Screen, then click **save**.

Appointment Confirmation

Customer: Annie . Nguyen **Network:** Normal **back** **save**

Identity	
Address: 123 5th Street Minneapolis, WA MN	
Customer Type: Current Phone Number: (612) 763-6518 (cell) E-mail Address: annie@email.com	
Appointment Your appointment is on Tuesday, August 07 at 12:15 pm with Lock at the CF120003 Edina for a Aftercare. Consultant: Jonathan Lock Store Address: 8800 Vancouver Mall Dr. Vancouver, WA 98662 Store Phone: (123) 456-7891	
Send Confirmation <input type="checkbox"/> Confirmation Email Clinic does not have a valid email address email template	
Waiting List <input type="checkbox"/> Add this customer to the waiting list: Store: CF120003 Edina Staff: Jonathan Lock Start Date: 9 / 19 / 2018 End Date: 8 / 7 / 2018 Appt Type: Aftercare Length: 30 minutes	
save close	

The rescheduled appointment and any new appointment notes is now visible on the schedule.



CONFIRMING AN APPOINTMENT - ACTIVITY 6

As we all know, it is sometimes easy to forget an appointment. The same is true for our patients.

Because it is vital that patients come to their scheduled appointments, you will help ensure they make it to their appointment on the correct date and time by sending them a confirmation. Depending on your location, confirmations can be done by phone, email, or by text messaging.

A text message confirmation that has been replied to will automatically change to confirmed. But if a phone call is needed to confirm an appointment, the appointment needs to be marked confirmed in Sycle.



Follow the steps below and reschedule an appointment for your patient. (I will be using Erin Aaron, but you can make up your own patient name).

Complete this process 4 more times using other fictitious patients, then record it on your Activity Checklist.

1. Click anywhere in the Call List box to open the call list

Tuesday, September 27 call list	
Call List	Qty.
CallBacks	15
Marketing Leads	1
Amplifon Referrals	0
Website Appointment	0
CRM Follow Up	15
Confirmed	0
Not Confirmed	0
No Show	0
Cancelled	1
Reschedule	4

2. Filter the list to show only **not confirmed** appointments.
3. After making the confirmation call, click **Confirmed**.
4. Click **save**.

The screenshot shows the Sycle.net software interface. At the top, there is a date selector set to "Tuesday, September 27, 2016" and a dropdown menu set to "not confirmed". A yellow arrow points from the "not confirmed" dropdown to the "not confirmed" label below it. To the right, there is a "Customer" field with "Erin Aaron" entered, a "Store" field with "TS000003 Amplifon Training Site 2", and a "Phone Number" field with "(780) 555-1212 (home)". On the right side, there is a status selection area with radio buttons for "Not Confirmed" (unchecked), "Confirmed" (checked), "Reschedule" (unchecked), and "Cancel / Remove" (unchecked). Below these are dropdown menus for "-Call Initiator-" and "-Cancellation Reason-". A yellow arrow points from the "Confirmed" radio button to the "Confirmed" option in the dropdown. At the bottom, there are three buttons: "save" (highlighted with a yellow circle), "print outcome forms", and "close" (highlighted with a yellow circle).

- ✓ Check your work: confirm that the appointment flag color on the screen next to the appointment you just confirmed is now green.



BLOCKING TIME ON THE CALENDAR - ACTIVITY 7

Using the Sycle calendar to manage your time and your team's time is very important. Schedules will be better organized and you can **Block Time** on the schedule for things like lunch, training, vacations, meetings, and other planned events.

Schedule blocks should only be used for non-appointment activities. If time is blocked on the schedule, patients will not be able to book appointments online during that time.

The following activity will detail how to:

- Schedule a Block Time
- Edit a Block Time
- Delete a Block Time



Follow the steps below and block time on the schedule.

Complete this process 4 more times, then record it on your Activity Checklist.

Schedule a Block Time

1. Click the **time** you wish to block

The screenshot shows the Sycle software interface with the following details:
- Top navigation bar: appointments, reports, marketing, administration, PATIENT SERVER, enter customer, /GO/
- Sub-navigation: Franchise: TS0000 - Amplifon Test 2
- Date: October 05, 2016
- Search fields: show store: global search, show consultant: TS000003 Amplifon Training Site 2, find appointment type: --Select One--, length: 0 min, find next
- Calendar: Displays the month of October 2016. The 5th is highlighted in purple. Buttons for Week at a glance and Month at a glance are visible.
- Timeline: Shows time from 8:00 am to 1:45 pm. The 12:00 pm slot is circled in yellow and has a cursor pointing at it.
- Consultant List: Shows Justin Smith, Cindy Test, and Gene Hernandez with their respective icons.
- Call List: Thursday, October 6 call list table:

Call List	Qty.
Callbacks	0
Marketing Leads	6
Confirmed	0
Not Confirmed	0
No Show	0
Cancelled	0

2. Click the **Schedule Block** hyperlink

The screenshot shows the Sycle software interface with the following details:
- Top navigation bar: search instructions, close
- Search bar: search, search all stores, Quick Add | Add a new customer |
- Hyperlinks: Schedule Block (circled in yellow), archive search | advanced search
- Bottom status bar: (redacted)

3. Enter:
Length
Description
Recurrence (if applicable)

4. Click **save**

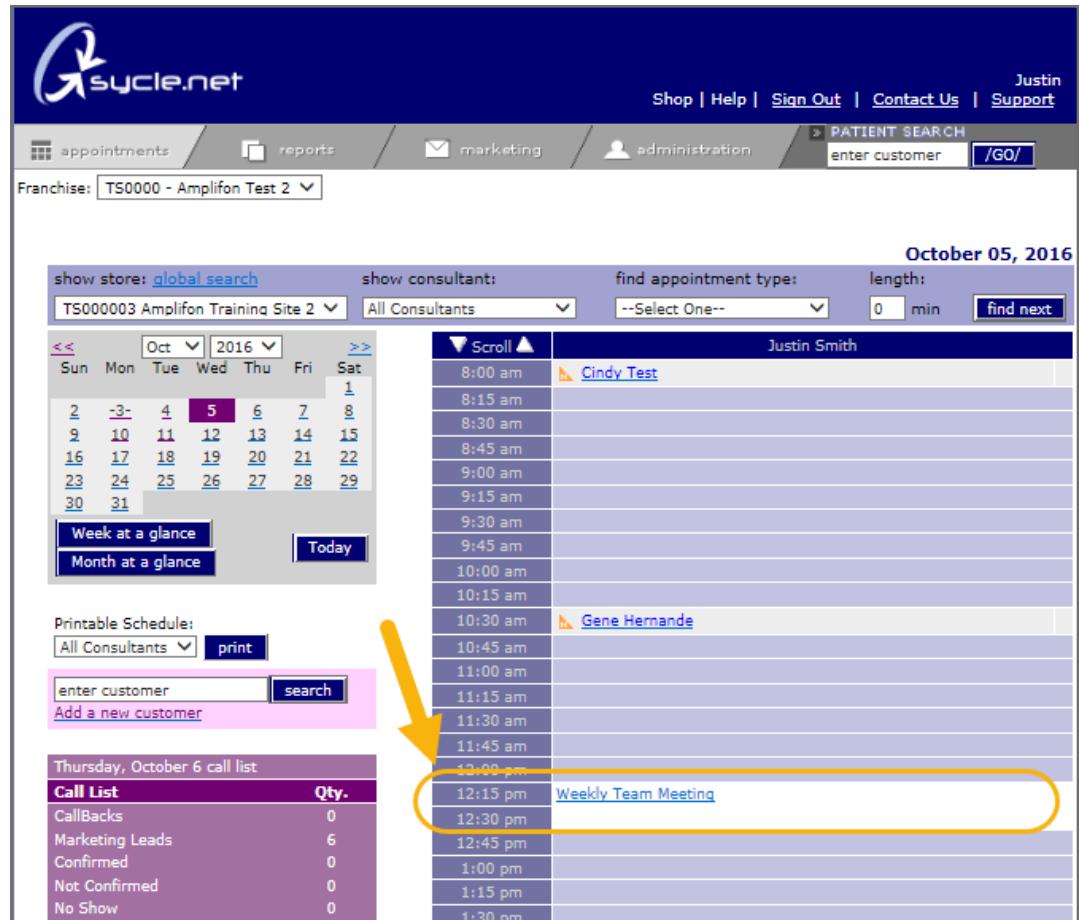
Staff Schedule Block

schedule block

Store: TS000003 Amplifon Training Site 2
 Consultant: Justin Smith
 Date: 10/05/16
 Start Time: 12:15 pm

Length:	30	minutes -OR-	<input type="checkbox"/>	until closed (6:00 pm)
Description:	Weekly Team Meeting			
Recurrence:	Repeat this appointment: every week day (mon-fri)			
Repeat:	52	times (not including this one)		
OR Until:	m	d	y	(max 200 recurrences)
<input type="button" value="Save"/> <input type="button" value="close"/>				

The **Blocked Time** is now visible on the schedule.



The screenshot shows the Asycle.net software interface. At the top, there's a navigation bar with links for Shop, Help, Sign Out, Contact Us, and Support. The user is logged in as Justin. Below the navigation, there's a search bar for 'PATIENT SEARCH' and a dropdown for 'Franchise: TS000003 Amplifon Training Site 2'. The main area is titled 'October 05, 2016'. It features a calendar for October 2016 with a highlighted purple block from 12:15 pm to 1:30 pm. To the right of the calendar is a list of time slots from 8:00 am to 1:30 pm. A yellow arrow points from the 'Save' button in the 'Staff Schedule Block' dialog to the 12:15 pm slot in the calendar, indicating that the scheduled time has been successfully saved. Other visible elements include a 'show store' dropdown set to 'global search', a 'show consultant' dropdown set to 'All Consultants', a 'find appointment type' dropdown set to '-Select One--', a 'length' input set to '0 min', and a 'find next' button. There are also buttons for 'print', 'search', and 'Add a new customer'.

Edit a Block Time

If you want to adjust or change a Block Time you can use the Edit Block time feature to do so without having to delete the entire Block and start over.

1. Click the **Block Time** hyperlink you want to edit

11:00 am	
11:15 am	
11:30 am	
11:45 am	
12:00 pm	
12:15 pm	Weekly Team Meeting
12:30 pm	
12:45 pm	
1:00 pm	
1:15 pm	
1:30 pm	

2. Click the **Edit Recurrence** hyperlink

Schedule Block Summary

schedule block [edit](#)

Consultant: Justin Smith
Date: 10/05/16
Start Time: 12:15 pm
Length: 30 minutes
Description: Weekly Team Meeting
Recurrence: This block repeats every week day [view all dates](#) | [edit recurrence](#)

[close](#) [cancel](#)

3. Make the edits you want, then click **continue**
(in this example, I've added recurrence)

Edit Appointment Recurrence

Staff: Justin Smith
This Appt Date: 10/05/2016
This Appt Time: 12:15 pm
This Appt Type: Staff Block

Editing recurrence will apply to future appointments only
edit appointment recurrence

Repeat this appointment:

Repeat: times (not including this one)

OR Until: (max 200 recurrences)

[continue](#) [cancel](#)

4. Review for accuracy,
then click **save**

Edit Appointment Recurrence

Staff: Justin Smith
This Appt Date: 10/05/2016
This Appt Time: 12:15 pm
This Appt Type: Staff Block

Appointments will be created on the following dates:

Fri	11/25/2016
Mon	11/28/2016
Tue	11/29/2016
Wed	11/30/2016
Thu	12/01/2016
Fri	12/02/2016
Mon	12/05/2016
Tue	12/06/2016
Wed	12/07/2016
Thu	12/08/2016
Fri	12/09/2016
Mon	12/12/2016
Tue	12/13/2016
Wed	12/14/2016
Thu	12/15/2016
Fri	12/16/2016

save

back

cancel

Delete a Block Time

If you made a mistake while entering a Block Time you can delete it and enter a new Block Time to correct the mistake.

1. Click the **Block Time** hyperlink you want to delete

9:30 am	
9:45 am	
10:00 am	
10:15 am	
10:30 am	
10:45 am	
11:00 am	
11:15 am	Lunch
11:30 am	
11:45 am	
12:00 pm	
12:15 pm	
12:30 pm	

2. Click **cancel**

Schedule Block Summary

schedule block

Consultant: Justin Smith
Date: 10/04/16
Start Time: 11:15 am
Length: 30 minutes
Description: Lunch
Recurrence: none [edit recurrence](#)

[close](#) [edit](#) [cancel](#)

3. Click the appropriate **cancel** button

What would you like to do with this appointment?

[dont cancel](#)

Due To: [--Select One--](#)

[cancel appointment](#)

[cancel this and future appointments](#)

[cancel all related appointments](#)

ENTERING AN APPOINTMENT OUTCOME - ACTIVITY 8

- At the end of each appointment you will enter what occurred. This is called the Appointment Outcome in the Sycle.Net system. An Outcome entry is required for **every appointment**.
- In this activity, you will be entering the Outcome of the appointment you confirmed in the previous activity.
- An outcome is entered after the patient has been seen by the Hearing Care Professional (HCP). When **Enter Outcome** is selected, the patients hearing loss can be manually entered into the system or it can be uploaded from NOAH by clicking the Refresh button in the outcome. (Not all locations have NOAH. Check with your Franchise Owner)
- Outcomes can be entered by the HCP or the FOA. If the FOA is responsible for entering outcomes in your office, discuss a process for the HCP to let the FOA know what information should be added to the appointment outcome. Consider using the Outcome Form in Sycle.
- Entering an Outcome will complete the appointment. By the end of each day, ALL appointments on the schedule should either have a complete triangle (dark blue) or no show (red triangle) icon displayed.



Follow the steps below and enter the outcomes for an appointment.
(Choose any open appointment on the schedule.)

Complete this process 4 more times, then record it on your Activity Checklist.

- Click any **appointment** on the schedule that has not been completed
- When the Appointment Summary opens, click **enter outcome**
- In the appointment outcome section, **select Demo New Technology** and **Companion Present yes**

appointment outcome	
*Outcome check all uncheck all	
Result:	<input checked="" type="checkbox"/> Demo New Technology <input type="checkbox"/> Modified HA <input type="checkbox"/> Needs Further Evaluation <input type="checkbox"/> Needs Model Exchange <input type="checkbox"/> Programming Adjustment
Outcome Notes:	
Speech Pathology:	<input type="checkbox"/>
Tinnitus:	<input type="checkbox"/>
*Spouse/Companion Present?	
<input checked="" type="radio"/> Yes <input type="radio"/> No	
Medical Referral: <input type="checkbox"/>	

- The level and type of hearing loss are required fields. These can be entered manually uploaded from NOAH by clicking the refresh button in the hearing test section of the outcome screen. For this example, Select **Level of loss: 2** and **Type: Sensorineural**
- In the notes section, type the **date, your initials**, and type **wife was not happy with purchase price. Follow up phone call needed.**
- Select **No, there was not a purchase with this appointment**
- In the purchase section drop-down menu (Was a hearing aid offered or demoed at this appointment?), select **offered**

purchases

Time since last hearing aid purchase: no purchases found
Were there any purchases with this appointment? (including hearing tests)

Yes
 No

Was a hearingaid offered or demoed at this appointment? **Offered**
Manufacturer: --Select One--

- Enter the **type, model, and price offered**, whether the offer was **binaural**, and any **accessories** offered

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

Yes
 No

Was a hearingaid offered or demoed at this appointment? **Offered**
Product Solution Recommended (used for CRM)
Manufacturer: --Select One--
Type: --Select One--
Model: --Select One--
Tech: --Select One--
Total Price Offered: _____
Binaural: Yes No
Accessories Offered: Yes No
HA Rejection Reason: Please Select

Note: If more than one product was offered, enter the product that is the most applicable recommendation for the patient. Any other information can be entered in the appointment notes section.

- Select **Price Objection** as the HA Rejection reason.

HA Rejection Reason: Please Select
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 Veterans benefits
Not enough time
Not ready.

previous receipt
Last Statement Printed: 04/20/2015
First HA Purchase: 04/20/2015
Date Total
07/03/2018 \$3895
04/20/2015 \$5000

Note: If there is more than one objection, always enter the most applicable objection in the drop down and enter any other reasons in the appointment notes.

- Click **save**.

HEARING AID PURCHASE - ACTIVITY 9

After the patient has arrived for their appointment and you have entered the appointment **Outcome**, if the patient purchased a hearing aid you will enter the **Purchase Summary** in Sycle. This is done from the Purchase Summary screen.

Note: All hearing aid purchases **MUST** be entered from the appointment *after* you have entered the Outcome. In addition, hearing aid sales must be made from the appointment during which the sale occurred.



Follow the steps below and block time on the schedule.

Complete this process 4 more times, then record it on your Activity Checklist.

1. Find the **appointment** on the schedule (use the appointment for which you just entered an outcome)
2. Click the appointment to open **Appointment Summary screen**
3. Click **add** in the purchase offers section

purchase offers		edit	add
Time Since Last Purchase:	3.2 years		
Product Offered:	MIRACLE EAR ME2100 OP BTE BTE Open Fit Digital		
Final Price Offered:	\$2500.00		
Binaural:	No		
Accessories Offered:	No		
Reason for no purchase:	Price Objection		

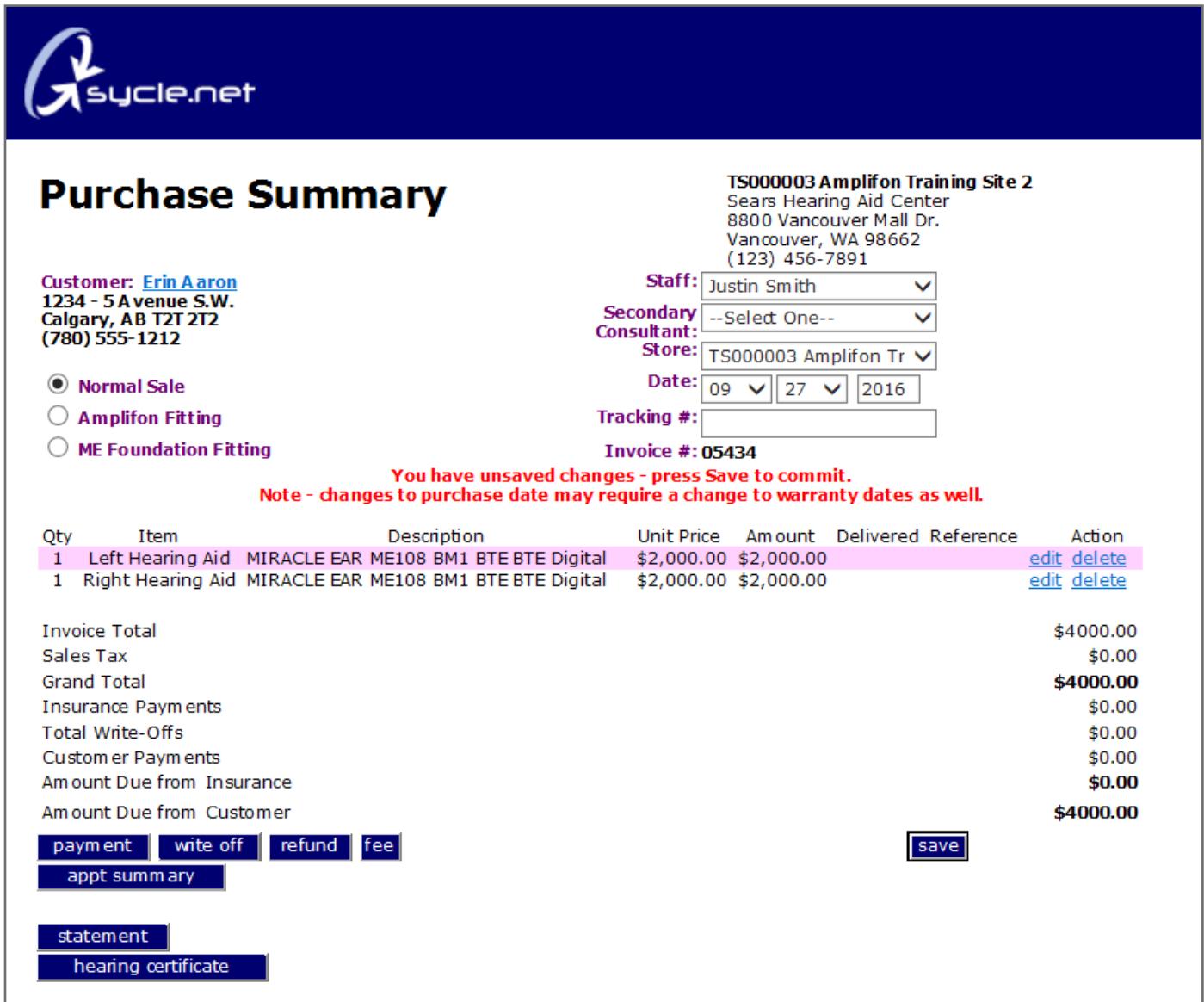
4. When the Purchase Summary opens, the **product** and **price** offered will **auto-populate**. If any changes have occurred, **update the information**, then click **save**.

Note: The purchase will auto populate as *binaural*. If the patient decides to purchase only one hearing aid, use the Hearing Aid Purchase screen to select the left or right hearing aid only, as appropriate.

Hearing Aid Purchase

Left Ear			
In Stock:	--Not From Stock--		
Manufacturer:	MIRACLE EAR		
Type:	BTE Open Fit		
Model:	ME2100 OP BTE		
Tech Level:	Digital		
Battery Type:	13		
Serial Number:			
Retail Price:	\$ 2500.00		
add discount			
Purchase Price:	\$ 2500.00		
Purchase Date:	7	3	2018
CPT:		look up	
Sales Tax:	<input type="checkbox"/> yes		
Mfr Warranty:	3	years	
L&D Warranty:	3	years	
Replacement Deductible:	\$ 0.00		

5. Enter the **payment** and any other information needed to complete the Purchase Summary.



Purchase Summary

Customer: Erin Aaron
1234 - 5 Avenue S.W.
Calgary, AB T2T 2T2
(780) 555-1212

Normal Sale
 Amplifon Fitting
 ME Foundation Fitting

Staff: Justin Smith
Secondary Consultant: --Select One--
Store: TS000003 Amplifon Tr
Date: 09 27 2016
Tracking #:
Invoice #: 05434

You have unsaved changes - press Save to commit.
Note - changes to purchase date may require a change to warranty dates as well.

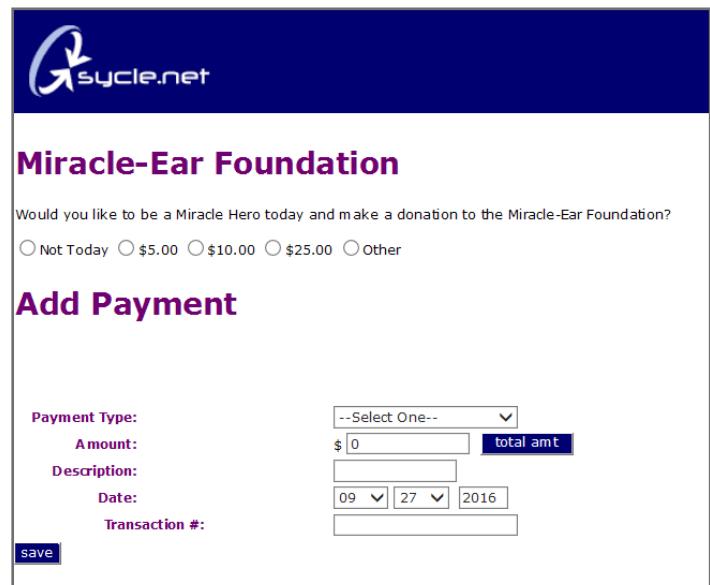
Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action
1	Left Hearing Aid	MIRACLE EAR ME108 BM1 BTE BTE Digital	\$2,000.00	\$2,000.00			edit delete
1	Right Hearing Aid	MIRACLE EAR ME108 BM1 BTE BTE Digital	\$2,000.00	\$2,000.00			edit delete

Invoice Total \$4000.00
Sales Tax \$0.00
Grand Total \$4000.00
Insurance Payments \$0.00
Total Write-Offs \$0.00
Customer Payments \$0.00
Amount Due from Insurance \$0.00
Amount Due from Customer \$4000.00

[payment](#) [write off](#) [refund](#) [fee](#) [appt summary](#) [save](#)

[statement](#) [hearing certificate](#)

6. Ask the patient if they would like to donate to the **Miracle-Ear Foundation** and select the **amount** in the corresponding button
7. Select **Payment Type**
8. Enter the **Amount** (if the patient is paying in full click the blue **total amt** button to auto-populate the amount due)
9. Enter a **Description** (if preferred at your store)
10. Enter a **Transaction #** (if preferred at your store)
11. Click **Save**



Miracle-Ear Foundation

Would you like to be a Miracle Hero today and make a donation to the Miracle-Ear Foundation?

Not Today \$5.00 \$10.00 \$25.00 Other

Add Payment

Payment Type: --Select One-- [total amt](#)
Amount: \$0
Description:
Date: 09 27 2016
Transaction #:

[save](#)

12. From the Purchase Summary, click the **Purchase Order** hyperlink

Customer Purchase Summary

Customer: Jane Doe
1234 Green St
Anytown, BC T1R 2R5
(123) 456-7890
Bill To:

View Appointment Summary

Normal Sale
 ME Foundation Fitting

Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action
1	Left Hearing Aid MIRACLE EAR ME2175 H BTE BTE Standard	\$2,000.00	\$2,000.00	IN000005	edit	16266021034	
1	Right Hearing Aid MIRACLE EAR ME2175 H BTE BTE Standard	\$2,000.00	\$2,000.00	IN000005	edit	16266021034	

Staff: Cri Rib
Sec. Consultant: --Select One--
Store: 9000001 Test Store
Date: 07 26 2016
Tracking #: Invoice #: 00003
Insurance: Private Pay

13. Click **Submit** to forward the Purchase Order (PO) in the system

14. To return to the Purchase Summary, click the **Invoice #** hyperlink

Purchase Order

Purchase Order #: 16266021034
Purchase Order Date: 07/26/2016
Vendor: MIRACLE EAR
Reason: New Order
Status: Entered
First Submit Date: --
Last Submit Date: --

Store: 9000001 Test Store
Invoice #: 00005
Customer: --Select One--
Delivery Instructions:

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv Qty	Recv Date	Unit Cost	Ext Cost
	left	11510765	ME2175 M BTE		1	0	1	each	Entered			0			
	right	11510765	ME2175 M BTE		1	0	1	each	Entered			0			

Order Total:

[save](#) [submit](#) [print](#) [close](#)

15. Print the **Purchase Agreement**

The purchase agreement is a legal document which the patient and the Hearing Care Professional must both sign.

Note: please pay close attention as you enter information. Mistakes can only be corrected by staff with Administrative privileges.

Purchase Summary

Customer: Erin Aaron
1234 - 5 Avenue S.W.
Calgary, AB T2T 2T2
(780) 555-1212

Normal Sale
 Amplifon Fitting
 ME Foundation Fitting

Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action
1	Earmold Left Earmold: Hear Savers Emtech	\$75.00	\$75.00				cancel
1	Earmold Right Earmold: Hear Savers Emtech	\$75.00	\$75.00				

Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action
1	Left Hearing Aid MIRACLE EAR ME108 BM1 BTE BTE Digital	\$2,000.00	\$2,000.00				edit delete
1	Right Hearing Aid MIRACLE EAR ME108 BM1 BTE BTE Digital	\$2,000.00	\$2,000.00				edit delete

Invoice Total: \$4000.00
Sales Tax: \$0.00
Grand Total: \$4000.00
Insurance Payments: \$0.00
Total Write-Offs: \$0.00
Customer Payments: \$0.00
Amount Due from Insurance: \$0.00
Amount Due from Customer: \$4000.00

[payment](#) [write off](#) [refund](#) [free](#)
[print](#) [close](#) [save](#)

[statement](#) [purchase agreement](#) [order form](#) [hearing certificate](#)

CHECKING IN (RECEIVING) A HEARING AID - ACTIVITY 10

When a hearing aid arrives from the manufacturer you will need check it into the Sycle system. This is also referred to as receiving. Check-In is an important process used to ensure all hearing aids are accurately reflected in your inventory.



Follow the steps below receive a hearing aid into your inventory. (I will be using Erin Aaron, but you can use your own fictitious patient.)

Complete this process 4 more times, then record it on your Activity Checklist.

1. From the drop-down menu, select:

- **Purchase Orders Submitted**
- Click the specific purchase order

PO #	PO Date	Sales Order	Sales Order Date	Vendor	Consumer	Status
16266021034	07/26/2016	00005	07/26/2016	MIRACLE EAR	Doe Jane	Submitted

2. Click **Receive**

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
	left	11510765	ME2175 M BTE		1	0	1	each	Submitted			0			
	right	11510765	ME2175 M BTE		1	0	1	each	Submitted			0			

3. Enter the **Invoice number**

Receive Purchase Order Items	
Invoice Numbers	
<input type="text" value="Add an Invoice # Here"/> add	

Add Invoice Number	
Serial Number	Quantity
<input type="text"/>	1
<input type="text"/>	1
save	cancel

Invoice #:
ok **cancel**

4. Enter the **Serial number(s)** and click **save**

Receive Purchase Order Items

Invoice Numbers

1234567890	add	remove
------------	------------	---------------

Serial Number

132456-123	Quantity	Invoice Number	Model
321545-321	1	1234567890	Left - ME2175 M BTE

save **cancel**

5. The hearing aid(s) are now received into the office inventory

Purchase Order

Purchase Order #: 16266021034 **Store:** 90000001 Test Store
Purchase Order Date: 07/26/2016 **Invoice #:** 00005
Vendor: MIRACLE EAR **Customer:** Jane Doe
Reason: New Order **Delivery Instructions:**
Status: Received **Action:** **Side:** **Item #:** **Desc:** **S/N:** **Qty:** **Cancel Qty:** **Net Qty:** **UM:** **Status:** **Rqst Date:** **Ship Date:** **Recv'd Qty:** **Recv'd Date:** **Unit Cost:** **Ext Cost:**
First Submit Date: 07/26/2016 **Last Submit Date:** --

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
	left	11510765	ME2175 M BTE	132456-123	1	0	1	each	Received			1	07/26/2016		
	right	11510765	ME2175 M BTE	321545-321	1	0	1	each	Received			1	07/26/2016		
			Order Total												

save **receive** **print** **close**

DELIVERING A HEARING AID - ACTIVITY 11

After checking in (receiving) hearing aids from the manufacturer, the next step is to deliver them. After the patient arrives for their Delivery appointment, deliver the hearing aids in Sycle. The delivery of the hearing aids must be documented in Sycle to keep your inventory information accurate and up to date.



Follow the steps below to deliver hearing aids in Sycle. (I will be using Erin Aaron, but you can use your own fictitious patient.)

Complete this process 4 more times, then record it on your Activity Checklist.

1. Click the purple **inventory box**

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

2. From the drop-down menu, select:

- **Hearing Aids to be Delivered to Customer**
- Locate your patient and check the box **Delivered to Clients**

3. Verify the **warranty end date** and **battery size** are correct, then click **save**

Date: Friday, September 30, 2016 [purchase ALDs](#) [add to in-stock](#) [save](#)

Show: Hearing Aids To Be Delivered To Customer Delivered to Clients
Receipt

Hearing Aids To Be Delivered To Customer

Customer: Erin Aaron

Equipment: MIRACLE EAR ME108 BM1 BTE BTE Digital Right Ear (1234567)

Warranty Start from: Purchase Date Delivery Date **Warranty End Date:** 9 30 2016 **Battery:** 13

Purchase Date: 09/27/2016 **Arrival Date:** 09/30/2016 **Mfr Invoice #:** 2552 **Notes:** warranty expires 9/30/2018

Customer: Erin Aaron

Equipment: MIRACLE EAR ME108 BM1 BTE BTE Digital Left Ear (222121212)

Warranty Start from: Purchase Date Delivery Date **Warranty End Date:** 9 30 2016 **Battery:** 13

Purchase Date: 09/27/2016 **Arrival Date:** 09/30/2016 **Mfr Invoice #:** 2550 **Notes:** warranty expires 9/30/2018

SELLING HEARING AID BATTERIES - ACTIVITY 12

Selling replacement and extra batteries is a great opportunity to increase your office's revenues and continue solidifying customer loyalty by providing a great patient experience and meeting their needs.



Follow the steps below to sell hearing aids in Sycle. (I will be selling batteries to Jane Doe, but you can use your own fictitious patient.)

Complete this process 4 more times, then record it on your Activity Checklist.

Note: Unlike hearing aids, batteries can be sold at any time. A hearing aid purchase does not need to be added to a completed patient appointment.

1. **Search for the patient** in the database.

search instructions
Jane Doe search all stores Quick Add | Add a new customer archive search | advanced search

Search Result - 90000001 Test Store, Active Customers

showing results 1-1 of 1 for 'Jane Doe'

Customer Name	Address	DoB	Phone Number	Last Visit
Jane Doe	1234 Green St Anytown, BC T1R	01/01/1950	(123) 456-7890 (home)	2

[appt](#) || **purchase** || repair || notes || callback || activity

2. Click **purchase** next to the patient's name.

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

Most recent appointment: HAE/Consultation 06-22-2016 (Completed)

add hearing aid purchase to this appointment

<input type="button" value="add"/> Earmolds	<input type="button" value="add"/> Batteries
<input type="button" value="add"/> Warranties	<input type="button" value="add"/> Services
<input type="button" value="add"/> Repairs	<input type="button" value="add"/> Accessories
<input type="button" value="add"/> Loan	<input type="button" value="add"/> Remotes
<input type="button" value="add"/> LACE®	<input type="button" value="add"/> Due from Insurance

3. Click **add** next to Batteries

Battery Purchase

Battery Size: 10
Battery Brand: Miracle Ear Batteries 4 p.
Price Per Item: 6.00
Quantity: 3
Total Price: \$ 18.00

Purchase Price: \$ 18.00
Purchase Date: 10 3 2016
CPT:
Sales Tax: yes

5. From the Purchase Summary, click **save**, then click **payment**
6. Ask if the patient would like to make a donation to the Miracle-Ear Foundation, then select the corresponding button
7. Select **Payment Type**
8. Enter the **Amount** (if the patient is paying in full click the blue total amt button to auto-populate amount due)
9. Enter a **Description** (if preferred at your store)
10. Enter a **Transaction #** (if preferred at your store)

Purchase Summary

Customer: Jane Doe
5000 Cheshire Parkway N.
Plymouth, MN
(763) 268-4000 4247

Staff: Justin Smith
Secondary Consultant: --Select One--
Store: TS000003 Amplifon Trair
Date: 10 03 2016
Tracking #: 05436
Invoice #: 05436

You have unsaved changes - press Save to commit.
Note - changes to purchase date may require a change to warranty dates as well.

Qty	Item	Description	Unit Price	Amount	Delivered	Reference	Action
3	Battery	Battery: Miracle Ear Batteries 10 4-pack	\$6.00	\$18.00			edit delete

Invoice Total \$18.00
Sales Tax \$1.08
Grand Total \$19.08
Insurance Payments \$0.00
Total Write-Offs \$0.00
Customer Payments \$0.00
Amount Due from Insurance \$0.00
Amount Due from Customer \$19.08

Buttons: payment (circled), write off, refund, fee, close, save (circled), statement, hearing certificate.

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

Miracle-Ear Foundation
Would you like to be a Miracle Hero today and make a donation to the Miracle-Ear Foundation?

Not Today \$5.00 \$10.00 \$25.00 Other

Add Payment

Buttons: save (circled).

Payment Type: --Select One--
Amount: \$ 0 total amt
Description: <input type="text"/>
Date: 10 03 2016
Transaction #: <input type="text"/>

*To print an invoice/receipt for the patient, click the Print button on the Purchase Summary.

*To view the battery sale, open the Customer Summary and click the date of the invoice in the invoice section

EXCHANGING HEARING AIDS - ACTIVITY 13

A patient may need to exchange their hearing aid for another model or type. Follow the steps below to complete an exchange.

Note: Sycle is only compatible with Internet Explorer and pop up blockers should be turned off. If you are using another browser, an exchange may show up as a return on your reports.

(Trade Up program sales after the return for credit period are considered a new sale and not an exchange.)



Follow the steps below to exchange a hearing aid in Sycle. (I will be using Annie Nguyen, but you can use your own fictitious patient.)

Complete this process 4 more times, then record it on your Activity Checklist.

1. **Search** for the patient in the database, then click their **name**

search instructions

ann ngu search search all stores Quick Add | Add a new archive search | advanced search

Customer Name Address DoB Phone Number L R Action

Annie Nguyen	123 Main Street Maple Grove, MN 55311		(763) 555-1212 (home)	L	R	Action
						apppt purchase repair notes callback activity

Search Result - TS000003 Amplifon Training Site 2, Active Customers

showing results 1-24 of 24 for 'ann ngu'

2. Scroll to locate the **current equipment** section of the Customer Summary

current equipment

view all return both exchange both

return both replace both edit both

Left Ear Equipment: MIRACLE EAR AC702 BC1 BTE BTE Digital
Serial Number:
Mfr Invoice #: Purchase Date: 09/27/2016
Check-in Date:
Delivery Date:
Battery Type: 10

Purchase Purchase Price: \$ 1777.00
Mfr Warranty Exp: none
L&D Warranty Exp: none
Ext Warranty Exp: none
Repair Warranty none
Exp:

Right Ear Equipment: MIRACLE EAR AC702 BC1 BTE BTE Digital
Serial Number:
Mfr Invoice #: Purchase Date: 09/27/2016
Check-in Date:
Delivery Date:
Battery Type: 10

Purchase Purchase Price: \$ 1777.00
Mfr Warranty Exp: none
L&D Warranty Exp: none
Ext Warranty Exp: none
Repair Warranty none
Exp:

3. Click **exchange** (if the patient is exchanging both hearing aids, click **exchange both**)

OK to exchange these items?

MIRACLE EAR AC702 BC1 BTE BTE Digital
MIRACLE EAR AC702 BC1 BTE BTE Digital

Return Date: 10 03 2016

ok cancel

5. Enter the **new hearing aids** to replace the exchanged items, then click **continue**

The screenshot shows two identical forms for "Hearing Aid Purchase" side-by-side. Each form is titled "Exchanging for MIRACLE EAR AC702 BC1 BTE BTE Digital".
Left Ear (Left Column):
 - In Stock: --Not From Stock--
 - Manufacturer: --Select One--
 - Type: --Select One--
 - Model: --Select One--
 - Tech Level: --Select One--
 - Battery Type: --Select One--
 - Serial Number: [Text Box]
 - Retail Price: \$ [Text Box]
 - add discount [Button]
 - Purchase Price: \$ [Text Box]
 - Purchase Date: 10 3 2016 [Date Picker]
 - CPT: [Text Box] look up [Link]
 - Sales Tax: yes
 - Mfr Warranty: [Text Box] years
 - L&D Warranty: [Text Box] years
 - Replacement Deductible: \$ 0.00
 - Control Options: [Text Box]

Right Ear (Right Column):
 - In Stock: --Not From Stock--
 - Manufacturer: --Select One--
 - Type: --Select One--
 - Model: --Select One--
 - Tech Level: --Select One--
 - Battery Type: --Select One--
 - Serial Number: [Text Box]
 - Retail Price: \$ [Text Box]
 - add discount [Button]
 - Purchase Price: \$ [Text Box]
 - Purchase Date: 10 3 2016 [Date Picker]
 - CPT: [Text Box] look up [Link]
 - Sales Tax: yes
 - Mfr Warranty: [Text Box] years
 - L&D Warranty: [Text Box] years
 - Replacement Deductible: \$ 0.00
 - Control Options: [Text Box]

 A "continue" button is located at the bottom right of the right-hand form.

6. On the Purchase Summary, both sets of hearing aids are visible, with the original hearing aids labeled as Exchanged. Click **Save**.

Add Payment

Payment Type: Check
 Amount: \$ 80.00 total amt [Button]
 Description: [Text Box]
 Date: 10 02 2009 [Date Picker]
 Transaction #: [Text Box]
 Deposit #: [Text Box]
 Deposit Date: 10 02 2009 [Date Picker]
 Check #: [Text Box]
 Check Date: 10 02 2009 [Date Picker]
 save [Button]

- If the new hearing aids cost more than the original, the amount of the difference will be displayed. Enter a payment by clicking **Payment**, then process the transaction.

Add Refund

Refund Type: Discover
 Refund Reason: Overpayment
 Amount: \$ 124
 Description: [Text Box]
 Date: 10 2 2009 [Date Picker]
 Transcation #: [Text Box]
 save [Button]

- If the new hearing aids cost less, the difference will be displayed. Click **Refund**, and then process the transaction.

7. Click the Purchase Order link to the right of the new hearing aids.

- **Submit** the purchase order
- **Save**
- **Check in** (receive) the new hearing aids (detailed in Activity 10)
- **Deliver** the new (exchanged) hearing aids (detailed in Activity 11)

Delivered 07/26/2016 CPT code: V5257 Exchanged 07/26/2016					
1 Left Hearing Aid	MIRACLE EAR AUDIOTONE PRO 2SP BTE Standard Digital Mfr Warranty Expires: 07/26/2017 CPT code: V5257	\$2,500.00	\$2,500.00	EX000005 edit	cancel 1626602103
1 Right Hearing Aid	MIRACLE EAR AUDIOTONE PRO 2SP BTE Standard Digital Mfr Warranty Expires: 07/26/2017 CPT code: V5257	\$2,500.00	\$2,500.00	EX000005 edit	cancel 16266021036

Caution: if you are exchanging a hearing aid, and the original invoice has not been entered in Sycle, the exchange process is different.

- An Appointment will need to be created for the original sale date.
- Enter the Outcome and complete the Purchase Summary.
- Reenter the Customer Summary and access the Current Equipment section.
- Click the exchange button and continue the exchange as detailed in the steps above.

(Please check with your Franchise Owner on how best to handle this process)



RETURNING HEARING AIDS - ACTIVITY 14

There are times when a previously purchased hearing aid is returned without making a new purchase. In the last activity we exchanged the original purchase and sold the patient another hearing aid. In this activity we are accepting a returned hearing aid and providing a refund. (when applicable)



Follow the steps below to return a hearing aid in Sycle. (I will be using Jane Doe, but you can use your own fictitious patient.)

Complete this process 4 more times, then record it on your Activity Checklist.

1. Locate your patient's record, then click their name.

search instructions close

jane search search all stores [Quick Add](#) | [Add a new customer](#) [archive search](#) | [advanced search](#)

Search Result - 90000001 Test Store, Active Customers

showing results 1-1 of 1 for 'jane'

Customer Name	Address	DoB	Phone Number	L	R	Action
Jane Doe	1234 Green St Anytown, BC T1R 2	01/01/1950	(123) 456-7890 (home)	•	•	appt purchase repair notes callback activity

2. Scroll to locate the **current equipment** section
3. Click **return** (if the patient is returning both hearing aids, click **return both**)

current equipment [view all](#) [return both](#) [exchange both](#) [replace both](#) [edit both](#)

Left Ear [return](#) [exchange](#)
[replace](#) [repair](#) [edit](#)

Equipment: MIRACLE EAR ME750 CIC CIC Digital
Serial Number:
Mfr Invoice #:
Purchase Date: 07/06/2016
Check-in Date: 07/06/2016
Delivery Date:
Battery Type: 10

Purchase
Purchase Price: \$ 1200.00
Mfr Warranty Exp: 07/06/2018
L&D Warranty Exp: 07/06/2017
Ext Warranty Exp: none
Repair Warranty Exp:

Right Ear [return](#) [exchange](#)
[replace](#) [repair](#) [edit](#)

Equipment: MIRACLE EAR ME750 CIC CIC Digital
Serial Number:
Mfr Invoice #:
Purchase Date: 07/06/2016
Check-in Date:
Delivery Date:
Battery Type: 10

Purchase
Purchase Price: \$ 1200.00
Mfr Warranty Exp: 07/06/2018
L&D Warranty Exp: 07/06/2017
Ext Warranty Exp: none
Repair Warranty Exp:

4. Confirm the correct hearing aids to be returned have been selected, then click **ok**

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**

5. Click **refund**
(consult with your Franchise Owner on your refund policy)

Invoice Total
Sales Tax
Grand Total
Insurance Payments
Total Write-Offs
Customer Payments
Amount Due from Ins.
Amount Due from Customer

payment **refund** **fee**

6. In the inventory section, locate the item from stock (if the hearing aid is to be returned for credit from the factory) and click **Return for Credit**

item	edit	loan	sell	repair	transfer	return for credit
Serial Number: 218630214 Mfr Inv #: S16M037230 Item Type: Hearing Aid Ear: Left Manufacturer: MIRACLE EAR Type: BTE RITEC 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:					

7. Enter the **return date**, necessary **notes** and click **return for credit**

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

return for credit **cancel**

Caution: if you are returning a hearing aid, and the original invoice has not been entered in SyCLE, the return process is different.



- An Appointment will need to be created for the original sale date.
- Enter the Outcome and complete the Purchase Summary.
- Reenter the Customer Summary and access the Current Equipment section.
- Click the return button and continue the return as detailed in the steps above.

(Please check with your Franchise Owner on how best to handle this process)

TRANSFERRING HEARING AIDS - ACTIVITY 15

Transferring hearing aids between locations to best meet the patient's needs and the business's best practice can be efficiently completed in Sycle.



Follow the steps below to transfer a hearing aid to a different location.

Complete this process 4 more times, then record it on your Activity Checklist.

1. Click the purple **Inventory** box

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

2. Use the Show drop-down menu to select **Items in Stock**
3. Click the **serial number** of the hearing aid you wish to transfer

Show: **Items In Stock** Location: 90000001 Test Store

Hearing Aids In Stock

Mfr:		Model:		S/N:		go	
Serial #	Mfr Inv #	Item Type	Mfr	Type	Model	Technology Options	Check-In Date
66667777	768678678	Hearing Aid	MIRACLE EAR	BTE Standard	ME2175 S BTE	Digital	07/28/2016
77778888	768678678	Hearing Aid	MIRACLE EAR	BTE Standard	ME2175 S BTE	Digital	07/28/2016
99998888	768678678	Hearing Aid	MIRACLE EAR	BTE Standard	ME2175 S BTE	Digital	07/28/2016

4. Click **transfer**

Inventory Detail

[equipment inventory](#) | [add item](#)

item	edit	loan	sell	repair	transfer	return for credit
Serial Number: 21B630214 Mfr Inv #: S16M037230 Item Type: Hearing Aid	Status: In Stock	Initial Check In: 07/11/2016	Last Loan Date: --			

5. Select the **store** you wish to transfer to, then click **save**

Inventory Transfer

Item: MI,ME950,1233456
Transfer Date: 07/26/2016
From Store: TS000003 Amplifon Training Site 2
To Store: [TS000001 Amplifon Train](#) ✓

Notes:

[save](#) | [cancel](#)

ENTERING A COMPETITIVE USER - ACTIVITY 16

A competitive user is a patient who has purchased hearing aids from someone other than Miracle-Ear.

We might be entering them into our database to reach out and market what we have to offer them, or they may be an active patient being seen at your office.



Follow the steps below to enter a competitive user. (I will be using Milo Dog, but you can make up your own patient information).

Complete this process 4 more times, then record it on your Activity Checklist.

1. Search for the **patient's name**

2. Review the search results, then click **Quick Add** after verifying your patient is not already in stock

Search Result - TS000003 Amplifon Training Site 2, Active Customers

Showing results 1-30 of 30 for 'mil dog'

Customer Name	Address	DoB	Phone Number	L	R	Action
MILLE CANADA	102 ARCH RD MIMS, FL 55	04/03/1933	(321) 267-6612 (home)			appt purchase repair notes callback activity
Miley Cyrus	5864 Twerk Lane Hollywood, CA		(508) 855-6245 (home)			appt purchase repair notes callback activity
bozo t dog	dog house back yard, WA 11111		(758) 336-9887 (home)			appt purchase repair notes callback activity
Jack Dog	4848 Pine Ave Meridian, ID 83642	02/02/1949	(208) 555-1236 (home)	●	●	appt purchase repair notes callback activity
Red Dog	192 Hound Lane Walla Walla, WA 78965		(852) 321-6547 (cell)			appt purchase repair notes callback activity

3. Complete the **required fields**, then change the **Customer Type** to **Competitive**

4. Click **save**

quick identity

*First Name: Milo

Middle Initial:

*Last Name: Dog

Customer Type: Competitive

Gender: Male

Date of Birth: 12 12 1999

*Phone: 763 122 1212

*Cell Phone: 555 554 1111

Not Provided

*Email Address: dogslife@feedme.com

Not Provided

address

*Address 1: 123 Puppy Street

Address 2:

*City: Chow

State/Province: WA

Zip/Postal Code: 55311

Country: USA

store and staff

*Store: TS000003 Amplifon Tr

Staff: --Select One--

5. Search for the patient you just created and click the **patient's name**

search instructions search search all stores Quick Add | Add a new customer archive search | advanced search close

Search Result - TS000003 Amplifon Training Site 2, Active Customers

showing results 1-1 of 1

Customer Name	Address	DoB	Phone Number	L	R	Action
Milo Dog	123 Puppy Street Chow, WA 55311	12/12/1999	(763) 122-1212 (home)			appt purchase repair notes callback activity

6. Scroll to the **other equipment** section, then click **add equipment**

current equipment [view all](#)

other equipment [view all equipment](#) [add equipment](#)

Ear	Item	S/N	Purchase Date	Price
-----	------	-----	---------------	-------

repairs [view all repairs](#)

Ear	Description	S/N	Repair Date	Price	Amt Due
-----	-------------	-----	-------------	-------	---------

7. Enter the information about the patient's **competitor equipment**, then click **save**.

current equipment

Left Ear		Right Ear	
Manufacturer:	Other Vendor	Manufacturer:	Other Vendor
Type:	Historical Data	Type:	Historical Data
Model:	GENERIC TELEX HAD	Model:	GENERIC TELEX HAD
Technology Lvl:	DIGITAL	Technology Lvl:	DIGITAL
Serial Number:	Phonak 2000	Serial Number:	Phonak 2001
Battery Type:	13 High Power	Battery Type:	13 High Power

Purchase Details

Left Ear		Right Ear	
Equipment:	Other Vendor GENERIC TELEX HAD Historical Data DIGITAL	Equipment:	Other Vendor GENERIC TELEX HAD Historical Data DIGITAL
Serial Number:	Phonak 2000	Serial Number:	Phonak 2001
Mfr Invoice #:		Mfr Invoice #:	
Purchase Date:	07/13/2015	Purchase Date:	07/13/2015
Check-in Date:		Check-in Date:	
Delivery Date:		Delivery Date:	
Battery Type:	13 High Power	Battery Type:	13 High Power

Purchase

Purchase Price:	\$ 0.00
Mfr Warranty Exp:	07/13/2017
L&D Warranty Exp:	none
Ext Warranty Exp:	none
Repair Warranty Exp:	none
	Exp:

ARCHIVING PATIENTS - ACTIVITY 17

As you may know, there are four different customer types in the Sycle.Net system. In the previous activities we worked with two of the customer types, Prospects and Current Users. In the next few activities we will explore the other two types, Archived Users and Competitive Users.

Review the definitions below then begin the activity:

Current User: a customer that has a Miracle-Ear hearing aid entered into the Current Equipment section of the Customer Summary

Prospect: a potential customer that is entered into the database but does not have a hearing aid purchase entered into the Current Equipment in the Customer Summary

Competitive User: a potential customer entered into the database that has purchased a hearing aid from a competitor

Archived User: a Current, Prospect or Competitive User that is changed to an inactive status

Archiving a patient should be done with caution. Offices should only archive patient records in situations like: duplicate patients in the system, the patient is deceased, or there is essentially no information about the person in the system and there is no way to retrieve it.

Archiving removes a patient from the current patient database! If there is a possibility of marketing to a patient, they should not be archived.



Follow the steps below to archive a patient. (I will be using Jeremiah Bullfrog, but you can make up your own patient information).

Complete this process 4 more times, then record it on your Activity Checklist.

1. Locate the patient's record and click the **name** hyperlink

search instructions close

jer bul search search all stores [Quick Add](#) | [Add a new customer](#) [archive search](#) | [advanced search](#)

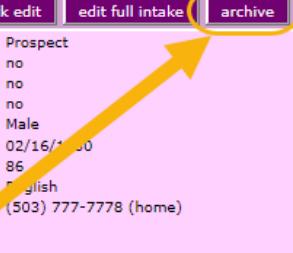
Search Result - TS000003 Amplifon Training Site 2,Active Customers

showing results 1-20 of 20 *jer bul*

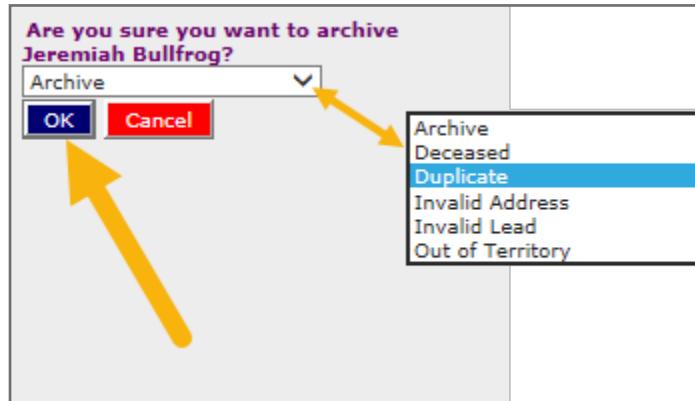
Customer Name	Address	DoB	Phone Number	L	R	Action
Jeremiah Bullfrog	79420 Lilly Pad Road Gresham, OR 97808	02/16/1930	(503) 777-7778 (home)			appt purchase repair notes callback activity

2. Click archive

Customer Summary

Customer: Jeremiah Bullfrog	patient finance	claim form	activity	purchase	new appt		
identity	quick edit edit full intake archive 						
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> Full Name: Jeremiah Bullfrog Preferred Name: Sycle Customer ID: 3848 Call Center ID: Address: 79420 Lilly Pad Road Gresham, OR 97808 Snowbird Address: </td> <td style="width: 50%;"> Customer Type: Prospect Insurance Customer: no Tinnitus: no Speech Pathology: no Gender: Male Date of Birth: 02/16/1930 Age: 86 Preferred Language: English Phone Number: (503) 777-7778 (home) Email Address: Legacy Customer ID: Created By: Justin Smith, 09/12/2013 13:03:37 EST Updated By: Justin Smith </td> </tr> </table>						Full Name: Jeremiah Bullfrog Preferred Name: Sycle Customer ID: 3848 Call Center ID: Address: 79420 Lilly Pad Road Gresham, OR 97808 Snowbird Address:	Customer Type: Prospect Insurance Customer: no Tinnitus: no Speech Pathology: no Gender: Male Date of Birth: 02/16/1930 Age: 86 Preferred Language: English Phone Number: (503) 777-7778 (home) Email Address: Legacy Customer ID: Created By: Justin Smith, 09/12/2013 13:03:37 EST Updated By: Justin Smith
Full Name: Jeremiah Bullfrog Preferred Name: Sycle Customer ID: 3848 Call Center ID: Address: 79420 Lilly Pad Road Gresham, OR 97808 Snowbird Address:	Customer Type: Prospect Insurance Customer: no Tinnitus: no Speech Pathology: no Gender: Male Date of Birth: 02/16/1930 Age: 86 Preferred Language: English Phone Number: (503) 777-7778 (home) Email Address: Legacy Customer ID: Created By: Justin Smith, 09/12/2013 13:03:37 EST Updated By: Justin Smith						
store and staff	Store: TS000003 Amplifon Training Site 2 Staff:						
referral source	Original Referral Source: Aftercare Sub Referral Source: Aftercare						
custom groups	edit						
employment and student status <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> Employment Status: Unknown Employer: Occupation: </td> <td style="width: 50%;"> Student Status: Not a Student School: </td> </tr> </table>						Employment Status: Unknown Employer: Occupation:	Student Status: Not a Student School:
Employment Status: Unknown Employer: Occupation:	Student Status: Not a Student School:						

3. Select the **Archive Reason** from the drop-down menu, then click **ok**



On the customer summary, the archive button has now become an unarchive button

Customer Summary

Customer: Jeremiah Bullfrog	patient finance	claim form	activity	purchase	new appt		
identity	quick edit edit full intake unarchive 						
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"> Full Name: Jeremiah Bullfrog Preferred Name: Sycle Customer ID: 3848 Call Center ID: Address: 79420 Lilly Pad Road Gresham, OR 97808 Snowbird Address: </td> <td style="width: 50%;"> Customer Type: Prospect Archive Reason: Duplicate Insurance Customer: no Tinnitus: no Speech Pathology: no Gender: Male Date of Birth: 02/16/1930 Age: 86 Preferred Language: English Phone Number: (503) 777-7778 (home) Email Address: Legacy Customer ID: </td> </tr> </table>						Full Name: Jeremiah Bullfrog Preferred Name: Sycle Customer ID: 3848 Call Center ID: Address: 79420 Lilly Pad Road Gresham, OR 97808 Snowbird Address:	Customer Type: Prospect Archive Reason: Duplicate Insurance Customer: no Tinnitus: no Speech Pathology: no Gender: Male Date of Birth: 02/16/1930 Age: 86 Preferred Language: English Phone Number: (503) 777-7778 (home) Email Address: Legacy Customer ID:
Full Name: Jeremiah Bullfrog Preferred Name: Sycle Customer ID: 3848 Call Center ID: Address: 79420 Lilly Pad Road Gresham, OR 97808 Snowbird Address:	Customer Type: Prospect Archive Reason: Duplicate Insurance Customer: no Tinnitus: no Speech Pathology: no Gender: Male Date of Birth: 02/16/1930 Age: 86 Preferred Language: English Phone Number: (503) 777-7778 (home) Email Address: Legacy Customer ID:						

UNARCHIVING A PATIENT - ACTIVITY 18

Sometimes a previously archived record will need to be unarchived. An archived record can be retrieved by running an archive search and then selecting that record to unarchive. Please note: you will not find an archived record using the search methods used prior to this activity.



Follow the steps below to unarchive a patient. (I will be using Jeremiah Bullfrog, but you can make up your own patient information).

Complete this process 4 more times, then record it on your Activity Checklist.

1. Search for the **patient's name**. If a patient's record is archived, it will not appear in the search results.
2. Click the **archive search** hyperlink

Justin
Shop | Help [Contact Us](#) | [Support](#)
close

search instructions
jeremiah bullfrog [search](#) [search all stores](#) [Quick Add](#) | [Add a new customer](#) [archive search](#) | [advanced search](#)

Search Result - TS000003 Amplifon Training Site 2,Active Customers

no results found for '*jeremiah bullfrog*'

Customer Name	Address	DoB	Phone Number	L	R	Action

3. Sycle will search the archive, and if it finds a corresponding patient record, it will appear in the search window.
4. Click **unarchive** to return the patient to the status of a current patient

Justin
Shop | Help [Contact Us](#) | [Support](#)
close

search instructions
jeremiah bullfrog [search](#) [search all stores](#) [Quick Add](#) | [Add a new customer](#) [customer search](#) | [advanced search](#)

Search Result - TS000003 Amplifon Training Site 2,Archived Customers

showing results 1-1 of 1 for '*jeremiah bullfrog*'

Customer Name	Address	DoB	Phone Number	Store	Action
Jeremiah Bullfrog	79420 Lilly Pad Road Gresham, OR 97808	02/16/1930	(503) 777-7778 (home)	TS000003 Amplifon Training Site 2	Unarchive

SELLING HEARING AIDS FROM STOCK - ACTIVITY 19

Depending on the equipment needed and the patient's condition, your office may have the hearing aid they wish to purchase in stock. If the hearing aid is in stock this means you do not have to submit an order from the manufacturer, it is located at your office or another office. The in stock hearing aid serial number must be selected in the inventory section prior to creating the purchase summary.

The activity below begins **after the appointment was **completed**, and the **outcome** has been entered.

*Remember that both those actions must be taken in Sycle before you can create a purchase summary for hearing aids.



Using one of your fictitious patients, schedule them an appointment, complete it, and enter the outcome (detailed in Activities 4 & 8). Follow the steps below to sell them a hearing aid from stock.

Complete this process 4 more times, then record it on your Activity Checklist.

- Once the appointment outcome has been entered and the Purchase Summary opens, click **add Hearing Aids**

Purchase Summary

Customer: [Erin Aaron](#)
1234 - 5 Avenue S.W.
Calgary, AB T2T 2T2
(780) 555-1212

Normal Sale
 Amplifon Fitting
 ME Foundation Fitting

TS000003 Amplifon Training Site 2
Sears Hearing Aid Center
8800 Vancouver Mall Dr.
Vancouver, WA 98662
(123) 456-7891

Staff: [Justin Smith](#) ▾
Secondary Consultant: --Select One-- ▾
Store: TS000003 Amplifon Tr ▾
Date: 09 ▾ 27 ▾ 2016
Tracking #:
Invoice #: 05443

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

payment **write off** **refund** **fee** **save**

appt summary

statement **hearing certificate**

add Hearing Aids ▲

add Earmolds **add Warranties** **add Repairs** **add Loan** **add LACE®**

Batteries **add**
2 **Services** **add**

1 **Accessories** **add**

1 **Remotes** **add**

Due from Insurance **add**

2. Select **In Stock** from the drop-down menu, then choose the hearing aid(s) you want to sell, then click **save**

Note: Choose each side separately; do not use the binaural button

Hearing Aid Purchase

Left Ear In Stock: MI, AC702, 10002121 Manufacturer: MIRACLE EAR Type: BTE Model: AC702 BC1 BTE Tech Level: Digital Battery Type: 10A Serial Number: 10002121 Retail Price: \$ 1777.00 Purchase Price: \$ 1777.00 Purchase Date: 9 27 2016 CPT: look up Sales Tax: <input type="checkbox"/> yes Mfr Warranty: years L&D Warranty: years Replacement Deductible: \$ 0.00 Control Options: Custom Options: <ul style="list-style-type: none"> Canal Length: --Select One-- Ear Texture: --Select One-- Venting: --Select One-- Color: --Select One-- Remote Control: --Select One-- Mfr Instructions: Spanish Manual: <input type="checkbox"/>	Right Ear binaural fit In Stock: Not From Stock Manufacturer: Select One Type: Select One Model: Select One Tech Level: Select One Battery Type: Select One Serial Number: Retail Price: Purchase Price: Purchase Date: 9 27 2016 CPT: look up Sales Tax: <input type="checkbox"/> yes Mfr Warranty: years L&D Warranty: years Replacement Deductible: \$ 0.00 Control Options: Custom Options: <ul style="list-style-type: none"> Canal Length: --Select One-- Ear Texture: --Select One-- Venting: --Select One-- Color: --Select One-- Remote Control: --Select One-- Mfr Instructions: Spanish Manual: <input type="checkbox"/>
--	---

3. Check that the **delivered date** on the Purchase Summary is correct and change if needed.
Deliver the hearing aid by clicking the **check mark** in the delivered box then click **save**.

Purchase Summary

Qty	Item	Description	Unit Price	Amount	Delivered	Action
1	Left Hearing Aid	MIRACLE EAR AC702 BC1 BTE BTE Digital (10002121)	\$1,777.00	\$1,777.00	<input checked="" type="checkbox"/>	edit delete cancel

Invoice Total: \$1777.00
Sales Tax: \$0.00
Grand Total: \$1777.00
Insurance Payments: \$0.00
Total Write-Offs: \$0.00
Customer Payments: \$0.00
Amount Due from Insurance: \$0.00
Amount Due from Customer: \$1777.00

Customer: Erin Aaron
1234 - 5 Avenue S.W.
Calgary, AB T2T 2T2
(780) 555-1212

Normal Sale
Amplifon Fitting
ME Foundation Fitting

Staff: Justin Smith
Secondary Consultant: -Select One-
Store: TS000003 Amplifon Tr
Date: 09 27 2016
Tracking #: 05443
Invoice #: 05443

payment **write off** **refund** **fee**
print **appt summary** **save**

statement
purchase agreement for --Select One--
order form
hearing certificate

ENTERING A REPAIR - ACTIVITY 20

When hearing aids break, repairs are necessary. Repairs are done on Custom, Canal and BTE hearing aids. Some repairs can be done right in your office; others will need to be sent out to be fixed.

When a patient brings in a hearing aid for repair and your location cannot fix the hearing aid in the office, it can be sent to the manufacturer to be repaired.



Follow the steps below to enter a repair to be sent to the manufacturer for your patient. (I will be using Charlie Brown, but you can make up your own patient information.)

Complete this process 4 more times, then record it on your Activity Checklist.

There are two different types of repairs: **in-warranty** and **out-of-warranty**. In this activity, practice entering both types of repairs.

1. Locate the patient's record and click **their name**.

showing results 1-51 of 51 for 'charlie brown'

Customer Name	Address	DoB
Charlie Brown	2600 Pennsylvania Ave	
	Washington, DC 1234	

2. Scroll through the Customer Summary and locate the **current equipment** section. Click **repair**.

current equipment

Left Ear		Right Ear	
Equipment:	Other Vendor Generic Hearing Aid Historical Data Digital	Equipment:	Other Vendor Generic Hearing Aid Historical Data Digital
Serial Number:	1147852	Serial Number:	369852
Mfr Invoice #:		Mfr Invoice #:	
Purchase Date:	01/01/2000	Purchase Date:	01/01/2000
Check-in Date:		Check-in Date:	
Delivery Date:		Delivery Date:	
Battery Type:	312	Battery Type:	312
Purchase			
Purchase Price: \$ 0.00			
Mfr Warranty Exp: 01/01/2003 (expired)			
L&D Warranty Exp: none			
Ext Warranty Exp: none			
Repair Warranty Exp: none			

3. Select **Repair Type**, then complete the additional information.

4. Click **save**.

Repair Purchase

Hearing Aid:	* (left, 1147852) Other Vendor Historical Da		
Repair Type:	--Select One--		
Description:			
Price:	\$		
Purchase Price:	\$		
Purchase Date:	10	3	2016
CPT:		look up	
Sales Tax:	<input type="checkbox"/> yes		
save			

5. Collect and enter payment (detailed in Activity 9).

The screenshot shows a list of financial items on the left:

- Invoice Total
- Sales Tax
- Grand Total
- Insurance Payments
- Total Write-Offs
- Customer Payments
- Amount Due from Insurance
- Amount Due from Customer

At the bottom, there are four buttons:

- payment** (highlighted with a yellow arrow)
- write off
- refund
- fee

Below these buttons is a red **close** button.

6. Click the Purchase Order hyperlink.

Customer Purchase Summary

90000001 Test Store
CA Test Store
Birdwood Plaza 1234 W Campbell St
Campbell, CA 55333-1234
(555) 333-1234

Customer: Jane Doe 1234 Green St Anytown, AB T1R 2R5 (111) 111-1111 Bill To:	Staff: Cri Rib Sec. Consultant: --Select One-- Store: 90000001 Test Store Date: 07 29 2016 Tracking #: <input type="text"/> Invoice #: 00004 Insurance: Private Pay
<input checked="" type="radio"/> Normal Sale <input type="radio"/> ME Foundation Fitting	
Qty Item Description Unit Price Amount Delivered Reference Action	
1 Repair Repair: Repair Factory 6 MO WARR Item Repaired: MIRACLE EAR ME750 SP BTE BTE Standard Digital (5665656556) CPT: V5014 CPT code: V5014	\$150.00 \$150.00 IN000004 edit cancel 16266021293

7. Click submit.

Purchase Order

Purchase Order #:	16266021293	Store:	90000001 Test Store
Purchase Order Date:	07/29/2016	Invoice #:	00004
Vendor:	MIRACLE EAR	Customer:	Jane Doe
Reason:	New Order	Delivery Instructions:	<input type="text"/>
Status:	Entered		
First Submit Date:	--		
Last Submit Date:	--		

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
	left		Repair Factory 6 MO WARR		1	0	1	each	Entered			0			
			Order Total												

At the bottom, there are four buttons:

- save**
- submit** (highlighted with a yellow circle)
- print
- close

Receiving and Delivering a Repair

When the repair is delivered to your office from the manufacturer, you will need to schedule and complete an appointment to deliver the repaired aid to the patient. The steps below walk you through how to receive and deliver a repaired hearing aid.

To receive the hearing aid:

1. Click the purple inventory box
2. From the drop-down menu, select **Purchase Orders Submitted**, then click the **PO hyperlink**

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

order stock items receive items save

Date: Friday, July 29, 2016
Show: Purchase Orders Submitted
Location: 90000001 Test Store
Start Date: 6 29 2016 End Date: 7 29 2016 Vendor: All go

PO #	PO Date	Sales Order	Sales Order Date	Vendor	Consumer	Status
16266021293	07/29/2016	00004	07/29/2016	MIRACLE EAR	Doe Jane	Submitted

3. From the Purchase Order screen click **receive**
4. Click **ok**
5. Click **save**

Purchase Order

Purchase Order #: 16266021293	Store: 90000001 Test Store
Purchase Order Date: 07/29/2016	Invoice #: 00004
Vendor: MIRACLE EAR	Customer: Jane Doe
Reason: New Order	Delivery Instructions:
Status: Submitted	
First Submit Date: 07/29/2016	
Last Submit Date: --	

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Revd Qty	Revd Date	Unit Cost	Ext Cost
left		Repair	6 MO		1	0	1	each	Submitted			0			
	Order														

Add Invoice Number

Invoice #: 123456789 ok cancel

Receive Purchase Order Items

Invoice Numbers

54645456456	add remove
-------------	---

Serial Number 5665656556 Quantity Invoice Number Model

1 54645456456 Repair: Left - Repair save cancel

To deliver the hearing aid:

1. Click the purple inventory box

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

2. From the drop-down menu, select **Items**

To Be Delivered To Customer, then check the **Delivered to Clients** box

The screenshot shows a software application window for managing hearing aids. At the top, there are two buttons: 'order stock items' and 'receive items'. Below these are three input fields: 'Date: Friday, July 29, 2016', 'Show: Items To Be Delivered To Customer', and 'Location: 90000001 Test Store'. The main area is titled 'Jane Doe' and contains the following details:
Customer: Jane Doe
Type: Repair
Equipment: MIRACLE EAR ME750 SP BTE BTE Standard Digital (5665656556)
Description:
Purchase Date: 07/29/2016
Arrival Date: 07/29/2016
Mfr Invoice #:
Notes:
At the bottom right of this section, there is a yellow circle highlighting the 'Delivered to Clients' checkbox. Above the checkbox, the text 'Order #: 00004' is displayed. To the right of the checkbox is a date input field labeled 'Serial Warranty Exp:' with dropdown menus for month (m), day (d), and year (y). At the very bottom of the window are 'save' and 'close' buttons.

PURCHASE ORDERS FOR CUSTOM ORDERS - ACTIVITY 21

Similar to other purchases, when a patient orders a hearing aid that is not in stock a purchase order is generated and submitted.



Follow the steps below to sell your patient a custom hearing aid. (I will be using Michael Bolton, but you can make up your own patient information.)

Complete this process 4 more times, then record it on your Activity Checklist.

**Remember: to create a hearing aid purchase there must be an outcome entered (detailed in activity 8) with a completed appointment (detailed in activity 9) in Sycle. Entering an appointment and outcome is required prior to accessing the Purchase Summary where you will be able to add the hearing aid purchase.

1. After adding the hearing aid sale, a purchase order is automatically created
2. Click the **Purchase Order** hyperlink

The screenshot shows two overlapping windows from the Sycle.net software:

Purchase Summary (Left Window):

- Customer: Jane Doe, 1234 Green St, Anytown, AB T1R 2RS, (111) 111-1111, Bill To: [dropdown]
- Normal Sale is selected.
- Qty, Item, Description, Unit Price, Amount, Delivered, Reference, Action, and Purchase Order columns are present in the grid.
- Grid entries:
 - 1 Left Hearing Aid MIRACLE EAR ME4200 PX BTE BTE Standard \$2,000.00 \$2,000.00 IN000006 edit cancel 16266021294
 - 1 Right Hearing Aid MIRACLE EAR ME4200 PX BTE BTE Standard \$2,000.00 \$2,000.00 IN000006 edit cancel 16266021294
- Buttons: payment, write off, refund, fee, appt summary, statement, hearing certificate, add Hearing Aids, add Earmolds.

Customer Purchase Summary (Right Window):

- Customer: Jane Doe, 1234 Green St, Anytown, AB T1R 2RS, (111) 111-1111, Bill To: [dropdown]
- Normal Sale is selected.
- Grid entries:
 - 1 Left Hearing Aid MIRACLE EAR ME4200 PX BTE BTE Standard \$2,000.00 \$2,000.00 IN000006 edit cancel 16266021294
 - 1 Right Hearing Aid MIRACLE EAR ME4200 PX BTE BTE Standard \$2,000.00 \$2,000.00 IN000006 edit cancel 16266021294
- Buttons: save.

A large yellow arrow points from the "add Hearing Aids" button in the Purchase Summary window to the "Purchase Order" hyperlink in the Customer Purchase Summary window. A purple circle with the number "1" is over the "add Hearing Aids" button, and a purple circle with the number "2" is over the "Purchase Order" hyperlink.

3. Click **submit** to begin processing the order

Purchase Order

Purchase Order #:	16266021294	Store:	9000001 Test Store
Purchase Order Date:	08/01/2016	Invoice #:	00006
Vendor:	MIRACLE EAR	Customer:	Jane.Doe
Reason:	New Order	Delivery:	
Status:	Entered	Instructions:	
First Submit Date:	--		
Last Submit Date:	--		

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	U/M	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
left	11510053	ME4200 PX BTE			1		1	each	Entered			0			
right	11510053	ME4200 PX BTE			1	0	1	each	Entered			0			
		Order Total													
Buttons: save submit print close															



Caution: changes cannot be made after clicking submit. Ensure you have made any adjustments to the model before you click submit.

4. The purchase order's status is now Submitted. Click the **Invoice #** to return to the Purchase Summary and take a payment. (you can also click close if you do not need to add a payment)

* When a HealthiPlan payment has been taken, edits can be done only until the end of the day of the sale

Purchase Order

Purchase Order #:	16266021294	Store:	9000001 Test Store
Purchase Order Date:	08/01/2016	Invoice #:	00006
Vendor:	MIRACLE EAR	Customer:	Jane.Doe
Reason:	New Order	Delivery Instructions:	
Status:	Submitted		
First Submit Date:	08/01/2016		
Last Submit Date:	--		

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	U/M	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
left	11510053	ME4200 PX BTE			1	0	1	each	Submitted			0			
right	11510053	ME4200 PX BTE			1	0	1	each	Submitted			0			
		Order Total													
Buttons: save receive print close															

Receiving a Purchase Order

- Click the purple inventory box

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

- From the Show drop-down menu, select **Purchase Orders Submitted**, then click the **PO# hyperlink**

order stock items receive items

Date: Monday, August 1, 2016

Show: Purchase Orders Submitted

Location: Purchase Orders Entered

Start Date: 7 End Date: 1 Year: 2016 Vendor: All

Items In Stock

PO #	PO Date	Sales Order	Sales Order Date	Vendor	Consumer	Status
16266021294	08/01/2016	06	08/01/2016	MIRACLE EAR	Doe Jane	Submitted

- Click **receive**

Purchase Order

Purchase Order #: 16266021294 Store: 90000001 Test Store

Purchase Order Date: 08/01/2016 Invoice #: 00006

Vendor: MIRACLE EAR Customer: Jane Doe

Reason: New Order Delivery Instructions:

Status: Submitted

First Submit Date: 08/01/2016

Last Submit Date: --

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
left	11510053	ME4200	PX BTE		1	0	1	each	Submitted			0			
right	11510053	ME4200	PX BTE		1	0	1	each	Submitted			0			
Order Total															
save receive print close															

- Click **Add** and enter the serial numbers and the invoice # on the packing slip of the product received.
- Click **save**.
- The purchase order's status is now Received. Click **close**.

Invoice Numbers

S16Z427725

add remove

Last Submit Date: --

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
left	11510053	ME4200	PX BTE	123223	1	0	1	each	Received			1	08/01/2016		
right	11510053	ME4200	PX BTE	321211	1	0	1	each	Received			1	08/01/2016		
Order Total															
save receive print close															

DELIVERING A CUSTOM ORDER - ACTIVITY 22

After checking in (receiving) hearing aids from the manufacturer and the patient has arrived for their Delivery appointment, they need to be delivered. The delivery of the hearing aids must be documented in Sycle to keep your inventory information accurate and up to date.



Follow the steps below to sell your patient a custom hearing aid. (Use the same fictitious patients you used in the previous activity.)

Complete this process 4 more times, then record it on your Activity Checklist.

**Remember: to deliver a hearing aid there must be an outcome entered (detailed in activity 8) with a completed appointment (detailed in activity 9) in Sycle.

1. Click the purple **inventory box**

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

2. From the Show drop-down menu, select Items To Be Delivered To Customer
3. Locate the patient from the list, then check the **Delivered to Clients** box
4. Ensure the warranty end date is correct, collect any payment due, then click **save**

order stock items receive items save

Date: Monday, August 1, 2016
Show: **Items To Be Delivered To Customer**
Location: 90000001 Test Store

Jane Doe Order #: **00006**

Customer: Jane Doe	<input type="checkbox"/> Delivered to Clients
Type: Left Hearing Aid	Warranty Start from:
Equipment: MIRACLE EAR ME4200 PX BTE BTE Standard Digital (123223)	<input type="radio"/> Purchase Date
Purchase Date: 08/01/2016	<input checked="" type="radio"/> Delivery Date
Arrival Date: 08/01/2016	Warranty End Date:
Mfr Invoice #:	8 ▾ 1 ▾ 2017 ▾
Notes:	Battery: 13

Jane Doe Order #: **00007**

Customer: Jane Doe	<input checked="" type="checkbox"/> Delivered to Clients
Type: Right Hearing Aid	Warranty Start from:
Equipment: MIRACLE EAR ME4200 PX BTE BTE Standard Digital (321211)	<input type="radio"/> Purchase Date
Purchase Date: 08/01/2016	<input checked="" type="radio"/> Delivery Date
Arrival Date: 08/01/2016	Warranty End Date:
Mfr Invoice #:	8 ▾ 1 ▾ 2017 ▾
Notes:	Battery: 13

Jane Doe Order #: **00008**

Customer: Jane Doe	<input checked="" type="checkbox"/> Delivered to Clients
Type: Repair	Repair Warranty Exp:
Equipment: MIRACLE EAR ME750 SP BTE BTE Standard Digital (6778678678)	m ▾ d ▾ y ▾
Description:	
Purchase Date: 08/01/2016	
Arrival Date: 08/01/2016	
Mfr Invoice #:	
Notes:	

save close

PURCHASE ORDERS FOR RETURNS AND EXCHANGES - ACTIVITY 23

There are times when a previously purchased hearing aid is returned without making a new purchase. In the last activity we exchanged the original purchase and sold the patient another hearing aid. In this activity we are accepting a returned hearing aid and providing a refund (when applicable).



Follow the steps below to return a hearing aid. (I will be using Jane Doe, but you will make up your own patient information.)

Complete this process 4 more times, then record it on your Activity Checklist.

1. Search for the patient and locate their record. Click the **patient's name**.

search instructions close

jane search search all stores Quick Add | Add a new customer archive search | advanced search

Search Result - 90000001 Test Store, Active Customers

showing results 1-1 of 1 for 'jane'

Customer Name	Address	DoB	Phone Number	L	R	Action
Jane Doe	1234 Green St Anytown, BC T1R 2	01/01/1950	(123) 456-7890 (home)			appt purchase repair notes callback activity

2. The Customer Summary opens. Scroll to locate the **current equipment** section
3. Click **return** (if the patient is returning both aids click **return both**)

current equipment

view all return both exchange both replace both edit both

Left Ear

Equipment: MIRACLE EAR ME750 CIC CIC Digital
Serial Number:
Mfr Invoice #:
Purchase Date: 07/06/2016
Check-in Date: 07/06/2016
Delivery Date:
Battery Type: 10

Right Ear

Equipment: MIRACLE EAR ME750 CIC CIC Digital
Serial Number:
Mfr Invoice #:
Purchase Date: 07/06/2016
Check-in Date:
Delivery Date:
Battery Type: 10

4. Choose the button for **Return to Inventory** or **Return to Vendor** based on the situation, choose a **Return Reason**, then click **ok**

OK to return these items?

- MIRACLE EAR ME750 SP BTE BTE Standard Digital (6876656758) Mfr Warranty Expires: 08/01/2017 Delivered 08/01/2016
 - return 6876656758 to inventory stock
 - return 6876656758 to vendor
- MIRACLE EAR ME750 SP BTE BTE Standard Digital (7897897876) Mfr Warranty Expires: 08/01/2017 Delivered 08/01/2016
 - return 7897897876 to inventory stock
 - return 7897897876 to vendor

Return Reason*: 007 - Decided to wait

Return Date: 08 01 2016

ok cancel

5. Click **OK**

OK. Hearing Aid returned.
Current Equipment
None
OK

6. Click **refund**, then click **save**

		Invoice #: 000010		Insurance: Private Pay	
<input checked="" type="radio"/> Normal Sale	<input type="radio"/> HI Foundation Fitting				
Qty	Item	Description	Unit Price	Amount	Delivered
1	Left Hearing Aid	MIRACLE EAR ME750 SP BTE BTE Standard Digital (6876656758) Mfr Warranty Expires: 08/01/2017 Delivered 08/01/2016 CPT code: V3257	\$1,500.00	\$1,500.00	<input checked="" type="checkbox"/> 8 ▾ 1 ▾ 2016
1	Left Hearing Aid	MIRACLE EAR ME750 SP BTE BTE Standard Digital (6876656758) Mfr Warranty Expires: 08/01/2017 Delivered 08/01/2016 CPT code: V3257		(\$1,500.00)	CR000010
1	Right Hearing Aid	MIRACLE EAR ME750 SP BTE BTE Standard Digital (7897897876) Mfr Warranty Expires: 08/01/2017 Delivered 08/01/2016 CPT code: V3257	\$1,500.00	\$1,500.00	<input checked="" type="checkbox"/> 8 ▾ 1 ▾ 2016
1	Right Hearing Aid	MIRACLE EAR ME750 SP BTE BTE Standard Digital (7897897876) Mfr Warranty Expires: 08/01/2017 Delivered 08/01/2016 CPT code: V3257		(\$1,500.00)	CR000010
Returned 08/01/2016					
Payment Cash 08/01/2016		(\$3,000.00)		PY000010 edit adjust	
Invoice Total					
\$0.00					
Sales Tax					
\$0.00					
Grand Total					
\$0.00					
Insurance Payments					
\$0.00					
Total Write-Offs					
\$0.00					
Customer Payments					
\$3000.00					
Amount Due From Insurance					
\$0.00					
Amount Owed to Customer					
(\$3000.00)					
<input checked="" type="checkbox"/> refund				<input type="button" value="save"/>	
<input type="button" value="statement"/>				<input type="button" value="save"/>	
<input type="button" value="purchase agreement"/>		for Canada			

7. Choose the following:

- Refund Type
- Refund Reason
- Description
- Transaction

Add Refund

Refund Type:	Visa
Refund Reason:	Return
Amount:	\$ 8000.00
Description:	
Date:	10 ▾ 9 ▾ 2009
Transcation #:	
<input type="button" value="save"/>	

8. The item is now returned to stock

Purchase Order Detail															
Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
		11513649	ME3300 RIC BTE	21EP35335	-1	0	0	each	Returned			-1	08/08/2016		
		Order Total													

9. If the item needs to be returned for credit from the factory click on the **inventory** section and locate the item from stock then click **Return for Credit**

Inventory Detail

equipment inventory		add item	
item			
Serial Number:	21AN01795	Status:	In Stock
Mfr Inv #:		Initial Check In:	01/28/2016
Item Type:	Hearing Aid	Last Loan Date:	--
Ear:	Either	Due Date:	N/A
Manufacturer:	MIRACLE EAR	Item Notes:	
Type:	BTE RITC		
Model:	ME5300 RIC BTE		

STOCK HEARING AIDS AND REMOTES - ACTIVITY 24

Frequently, you will need to enter hearing aids into your stock and receive the hearing aids.

This activity is particularly helpful when a location is hosting an Open House or special event and would like some stock hearing aids on hand. Both offices who use Purchase Orders and those who do not, will be covered in this section.



Follow the steps below to enter hearing aids into your stock.

Complete this process 4 more times, then record it on your Activity Checklist.

1. Click the purple **inventory box**

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

- ## 2. Select Order Stock Items

order stock items **receive items** **save**

Date: Monday, August 1, 2016

Show: Purchase Orders Entered

Location: 90000001 Test Store

Start Date: End Date: Vendor:

7 2 2016 8 1 2016 All go

Purchase Orders Entered							
PO #	PO Date	Sales Order	Sales Order Date	Vendor	Consumer	Status	

3. Choose the vendor and click **add**

Purchase Order

Purchase Order #: --
 Purchase Order Date: 08/01/2016
 Vendor: MIRACLE EAR
 Reason: Inventory
 Status: Not Saved
 First Submit Date: --
 Last Submit Date: --

Store: 90000001 Test Store
 Invoice #: --
 Customer: --
 Delivery Instructions:



Purchase Order Detail															
Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
Add															
			Order Total												

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

4. Choose the **item** you are adding to stock

Add Purchase Order Line

Item Type:	<input style="width: 150px; height: 25px; border: 1px solid black;" type="text" value="Hearing Aid"/> <div style="position: absolute; top: -10px; right: -10px; width: 10px; height: 10px; background-color: #ccc; border-radius: 50%;"></div> <div style="position: absolute; top: 0px; right: 0px; width: 15px; height: 25px; background-color: #ccc; border-right: 1px solid black; border-bottom: 1px solid black; border-bottom-left-radius: 5px; border-bottom-right-radius: 5px;"></div>
--Select One-- Hearing Aid Accessory Remote	

5. Enter **Quantity**, **Side**, **Item**, and **Options**, then click **OK**

Add Purchase Order Line

Item Type:	Hearing Aid
Qty:	2
Side:	none
Item:	11508962
Options:	
<input type="button" value="ok"/> <input type="button" value="cancel"/>	

6. Click **save**

Purchase Order

Purchase Order #:	--	Store:	90000001 Test Store																																															
Purchase Order Date:	08/01/2016	Invoice #:	--																																															
Vendor:	MIRACLE EAR	Customer:	--																																															
Reason:	Inventory	Delivery																																																
Status:	Not Saved	Instructions:																																																
First Submit Date:	--																																																	
Last Submit Date:	--																																																	
You have unsaved changes - click save to commit. undo changes																																																		
Purchase Order Detail <table border="1"> <thead> <tr> <th>Action</th> <th>Side</th> <th>Item #</th> <th>Desc</th> <th>S/N</th> <th>Qty</th> <th>Cancel Qty</th> <th>Net Qty</th> <th>UM</th> <th>Status</th> <th>Rqst Date</th> <th>Ship Date</th> <th>Recv'd Qty</th> <th>Recv'd Date</th> <th>Unit Cost</th> <th>Ext Cost</th> </tr> </thead> <tbody> <tr> <td>Edit</td> <td></td> <td>11508962</td> <td>ME4200 OP BTE</td> <td></td> <td>2</td> <td>0</td> <td>2</td> <td></td> <td></td> <td></td> <td></td> <td>0</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Add</td> <td></td> <td></td> <td>Order Total</td> <td></td> </tr> </tbody> </table>				Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost	Edit		11508962	ME4200 OP BTE		2	0	2					0				Add			Order Total											
Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost																																			
Edit		11508962	ME4200 OP BTE		2	0	2					0																																						
Add			Order Total																																															
<input type="button" value="save"/> <input type="button" value="print"/> <input type="button" value="close"/>																																																		

7. Click **submit** to complete the order

Purchase Order

Purchase Order #:	16266021297	Store:	90000001 Test Store																																															
Purchase Order Date:	08/01/2016	Invoice #:	--																																															
Vendor:	MIRACLE EAR	Customer:	--																																															
Reason:	Inventory	Delivery																																																
Status:	Entered	Instructions:																																																
First Submit Date:	--																																																	
Last Submit Date:	--																																																	
Purchase Order Detail <table border="1"> <thead> <tr> <th>Action</th> <th>Side</th> <th>Item #</th> <th>Desc</th> <th>S/N</th> <th>Qty</th> <th>Cancel Qty</th> <th>Net Qty</th> <th>UM</th> <th>Status</th> <th>Rqst Date</th> <th>Ship Date</th> <th>Recv'd Qty</th> <th>Recv'd Date</th> <th>Unit Cost</th> <th>Ext Cost</th> </tr> </thead> <tbody> <tr> <td>Edit</td> <td></td> <td>11508962</td> <td>ME4200 OP BTE</td> <td></td> <td>2</td> <td>0</td> <td>2</td> <td>each</td> <td>Entered</td> <td></td> <td></td> <td>0</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Add</td> <td></td> <td></td> <td>Order Total</td> <td></td> </tr> </tbody> </table>				Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost	Edit		11508962	ME4200 OP BTE		2	0	2	each	Entered			0				Add			Order Total											
Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost																																			
Edit		11508962	ME4200 OP BTE		2	0	2	each	Entered			0																																						
Add			Order Total																																															
<input type="button" value="save"/> <input type="button" value="submit"/> <input type="button" value="print"/> <input type="button" value="close"/>																																																		

Receiving Stock Orders

1. Click the purple inventory box

Hearing Aids	
Inventory	Qty.
Out to Manufacturer	517
In from Manufacturer	84
Show all/Check In or Out...	

2. Select **Purchase Orders Submitted**, then click the PO# hyperlink

order stock items receive items save

Date: Monday, August 1, 2016
Show: Purchase Orders Submitted
Location: 90000001 Test Store
Start Date: End Date: Vendor:
7 2 2016 1 2016 All go

Purchase Orders Submitted							
PO #	Prod. No.	Sales Order	Sales Order Date	Vendor	Consumer	Status	
16266021296		00008	08/01/2016	MIRACLE EAR	Doe Jane	Submitted	
16266021297		00000		MIRACLE EAR	Inventory	Submitted	

3. Click **receive**

Purchase Order

Purchase Order #:	16266021297	Store:	90000001 Test Store
Purchase Order Date:	08/01/2016	Invoice #:	--
Vendor:	MIRACLE EAR	Customer:	--
Reason:	Inventory	Delivery Instructions:	
Status:	Submitted		
First Submit Date:	08/01/2016		
Last Submit Date:	--		

Purchase Order Detail

Action	Side	Item #	Desc	S/N	Qty	Cancel Qty	Net Qty	UM	Status	Rqst Date	Ship Date	Recv'd Qty	Recv'd Date	Unit Cost	Ext Cost
		11508962	ME4200 OP BTE		2	0	2	each	Submitted			0			

 save receive print close

4. Click **add**, then add the invoice number, serial number, and click **save**

Receive Purchase Order Items

Invoice Numbers

1001	 add
------	---

Serial Number

10101000	Quantity	Invoice Number	Model
10101001	1	1001	ME4200 OP BTE
	1	1001	ME4200 OP BTE

 save cancel

5. Return to **inventory**
6. From the **Show** drop-down menu, select **Items in Stock**
7. All the items currently in stock will be displayed

order stock items receive items save

Date: Monday, August 1, 2016

Show: Items In Stock

Location: 90000001 Test Store

Hearing Aids In Stock									
Mfr:	All	Model:	All	S/N:		go	Technology	Options	Check-In Date
Serial #	Mfr Inv #	Item Type	Mfr	Type	Model				
10101000	1001	Hearing Aid	MIRACLE EAR	BTE Open Fit	ME4200 OP BTE	Digital			08/01/2016
10101001	1001	Hearing Aid	MIRACLE EAR	BTE Open Fit	ME4200 OP BTE	Digital			08/01/2016
123223	12345	Left Hearing Aid	MIRACLE EAR	BTE Standard	ME4200 PX BTE	Digital			08/01/2016
321211	12345	Right Hearing Aid	MIRACLE EAR	BTE Standard	ME4200 PX BTE	Digital			08/01/2016
6876656758	5687568568	Hearing Aid	MIRACLE EAR	BTE Standard	ME750 SP BTE	Digital			07/29/2016
7687686868	5687568568	Left Hearing Aid	MIRACLE EAR	BTE Standard	ME750 SP BTE	Digital			07/29/2016
7896789967	5687568568	Left Hearing Aid	MIRACLE EAR	BTE Standard	ME750 SP BTE	Digital			07/29/2016
7897897876	5687568568	Hearing Aid	MIRACLE EAR	BTE Standard	ME750 SP BTE	Digital			07/29/2016

COMPLETE LIST OF APPOINTMENT TYPES AND SUB TYPES

Appointment Type: Screening

Sub-Type	Objections	Outcomes	Definition	Customer Type
Screen/ Test	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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)

Sub-Type	Objections	Outcomes	Definition	Customer Type
Call - Follow Up	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech Pathology • Tinnitus • Medical Referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Contacted and discussed • Hasn't purchased yet • Left message • Purchased elsewhere 	Call to prospect that was tested/ had loss/ but did not purchase	Prospect
Prospect Annual Retest		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Demo new technology • Lease • Needs further evaluation • Referral program patient • Trial • Test completed • Purchase made 	Comprehensive Hearing Evaluation for the purpose of selling a hearing aid for previously tested prospect/ competitive	Prospect, Comp User

Appointment Type: Impressions Order

Sub-Type	Objections	Outcomes	Definition	Customer Type
Ear mold impression	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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

Sub-Type	Objections	Outcomes	Definition	Customer Type
HA - Initial Fitting	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Delivery complete • Delivery incomplete • Aural Rehab Recommended • Modified HA • Product Issue • Referral Program patient 	Initial delivery appointment of a hearing aid	Current
HA - Initial Redelivery		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Delivery complete • Delivery incomplete • Loss And Damage Delivery • New Product Received • Patient Not Satisfied • Patient Satisfied • Repair Delivery 	Follow up delivery of hearing aid from initial fitting	Current

Appointment Type: Delivery (continued)

Sub-Type	Objections	Outcomes	Definition	Customer Type
HA - Repair/Service	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Delivery complete • Delivery incomplete • Loss And Damage Delivery • 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		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Price objection • Shopping around • Thinking it over • Doubt test results/denial • Ins benefit too low or N/A • Questions brand/product 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Contacted and discussed • Left message 	Follow up phone call to patient after delivery of hearing aid, aftercare appt, service issue	Current
< 1 Month	<ul style="list-style-type: none"> • Financing declined • To discuss with companion • Have veteran's benefits • Not enough time • Not ready 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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

Appointment Type: Aftercare

Sub-Type	Objections	Outcomes	Definition	Customer Type
Clean and Check	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Demo New Technology • Modified HA • Needs Further Evaluation • Needs Model Exchange • Programming Adjustment • Cleaned HA • Test Completed • Purchase Made 	Follow-up aftercare every 4-6 months for cleaning, REM verification, programming	Current, Comp User
Rehab		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Patient Not Adapting to Aids • Reviewed Results 	Follow up aftercare for auditory training programs such as LACE	Current

Appointment Type: Online Aftercare

Sub-Type	Objections	Outcomes	Definition	Customer Type
Aftercare booked online	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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

Appointment Type: Model Change

Sub-Type	Objections	Outcomes	Definition	Customer Type
Exchange HA	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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+		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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

Appointment Type: HA Service

Sub-Type	Objections	Outcomes	Definition	Customer Type
Loss and Damage	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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

Sub-Type	Objections	Outcomes	Definition	Customer Type
Potential Return	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Product returned • product not returned • Demo New Technology • Model Exchanged • Needs Further Evaluation • Patient Not Satisfied • Patient Satisfied • Test Completed • Purchase Made 	Appointment for patients requesting to return hearing aids	Current
Lease Return		<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • Demo New Technology • Lease End Returned • New lease • Purchase leased HA • Purchase new HA 	Appointment for patients at the end of their lease period	Prospect, Current

Appointment Type: Walk In

Sub-Type	Objections	Outcomes	Definition	Customer Type
Miscellaneous purchases	<ul style="list-style-type: none"> • 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 	<p>Standard Options</p> <ul style="list-style-type: none"> • Companion present yes/no • Speech pathology • Tinnitus • Medical referral <p>Additional Checkboxes</p> <ul style="list-style-type: none"> • 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 REFERENCE SHEET

Miracle-Ear Appointment Types and Sub Types with Description

Appointment Type	Appointment Sub-Type	Description
Screening	Screen/Test	Diagnostic screening with the purpose of evaluating a prospects hearing for insurance, government or a corporation inside or outside of the office
	No or Partial Test	Appointment to screen patient for hearing loss, inside or outside the office ie; Health Fair, VO screening
HAE/Consultation	Complete HAE	Comprehensive Hearing Evaluation for the purpose of selling a hearing aid
	Follow-Up	Additional consultation or to complete the hearing aid evaluation needed for the purpose of selling a hearing aid
	Med Ref Follow-Up	Additional consultation or to complete the hearing aid evaluation needed for the purpose of selling a hearing aid for a medical referral
	Call - Follow up	Call to prospect that was tested/ had loss/ but did not purchase
	Prospect Annual Retest	Comprehensive Hearing Evaluation for the purpose of selling a hearing aid for previously tested prospect/ competitive
Online HAE	HAE Booked Online	Comprehensive Hearing Evaluation for the purpose of selling a hearing aid booked by the patient online
Impressions Order	Ear mold impression	Appointment for the sole purpose of taking an impression for hearing aids or earmolds
Delivery	HA - Initial Fitting	Initial delivery appointment of a hearing aid
	HA - Initial Redelivery	Follow up delivery of hearing aid from Initial fitting
	HA - Repair/Service	Follow up delivery of hearing aid for remake, repaired or L& D or exchanged hearing aids
	Accessory/Ear Mold	Appt to deliver accessories or ear molds to patient
Adjustment Follow Up	Phone Call	Follow up phone call to patient after delivery of hearing aid, aftercare appt, service issue
	< 1 Month	Follow up aftercare appt in initial period after delivery of a hearing aid (less than 1 month after delivery)
	< 3 Months	Follow up aftercare appt in initial period after delivery of hearing aid (2-3 months after delivery)



Miracle-Ear Appointment Types and Sub Types with Description

Appointment Type	Appointment Sub-Type	Description
Aftercare	Clean and Check	Follow up Aftercare every 4-6 months for cleaning, REM verification, programming,
	Rehab	Follow up Aftercare for auditory training programs such as LACE
Online Aftercare	Booked online	Follow up Aftercare every 4-6 months for cleaning, REM verification, programming,
Model Change	Exchange HA	Appointment specifically to exchange or upgrade the model of a previously delivered hearing aid
Annual Retest	Years 1-3	Comprehensive annual follow up evaluation for patient currently wearing a Miracle-Ear hearing aid for 1-3 years (use when HAs are in warranty)
	Call - Trade up	Call to current patient to schedule annual retest for purpose of demonstrating new technology and presenting the Trade Up program
	Years 3+	Comprehensive annual follow up evaluation for patient currently wearing a Miracle-Ear hearing aid for over 3 years (use when HAs are out of warranty)
HA Service	Loss & Damage	Appointment for patients that have lost/damaged hearing aids in /out warranty
	Trouble with HA	Appointment for patient experiencing issues or needing repair with a hearing aid in or out of warranty
Return	Potential Return	Appointment for patients requesting to return hearing aids
	Lease Return	Appointment for patients at the end of their lease period
Walk In	Misc Purchases	Miscellaneous appt created for walk ins or other situations to purchase accessories or batteries

