



The #1 Hearing Care Practice Management Solution

Sycle Private Practice Managed Care Guide



MANAGED CARE - THIRD-PARTIES USER GUIDE

Sycle has a new Managed Care (also known as 3rd Party Payers) solution that will aid clinic owners to support their managed care patients. These new enhancements are designed to improve clinic productivity and promote profitability.

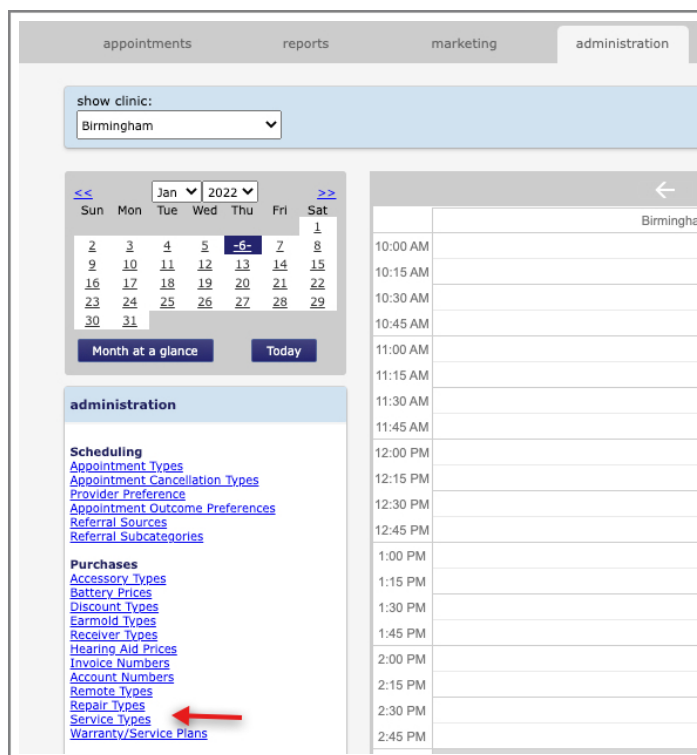
With this solution, users will be able to define the Managed Care programs that they have worked together with and quickly identify if they are dealing with a Managed Care patient, or a private pay patient, to customize their services to their patient-specific needs.

Users will be able to quickly verify if the patient has exceeded their appointment limits or if their program has expired. They can also generate a report that will accurately indicate when their Managed Care program will expire and proactively customize their services accordingly.

We also have added a custom data point so that the business owner can compare their Managed Care revenue versus their private pay revenue, and plan their next business initiative accordingly.

Administration Set-Up:

There are a few key items within Administration to set-up for proper Managed Care input. Begin by navigating to the **Administration** section of Sycle and select **Service Types** under the Purchases section.



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In here you will enter fees that the Managed Care company will pay the clinic for services that are provided to the patient.

1. Click **add another type**.
2. Enter the Service type (this should be named so that you know when looking at your reports this service was a Managed Care/Third Party service).
3. Click **Save**.
4. Once the service has been saved you will have the option to select this service as a Managed Care service.
5. Click **Save**.
6. Complete these steps to add all the Managed Care service types that you would charge.

The screenshot shows the 'Add Service Type' window in the Sytle system. The window title is 'cycle.net :: Add Service Type'. The URL is 'uat-sytle.cycle.net/freecvs/admin_new_service_type.php?admin_clinic_id=11640'. The Sytle logo is in the top left. The top right has links for 'Videos', 'Support', and 'Need Help'. The main form has three fields: 'Type' (TruHearing Fitting Fee), 'CPT Code' (empty), and 'Price' (\$350.00). A red arrow points to the 'add another type' button in the sidebar. Another red arrow points to the 'Type' field. A third red arrow points to the 'Price' field. A fourth red arrow points to the 'save' button.

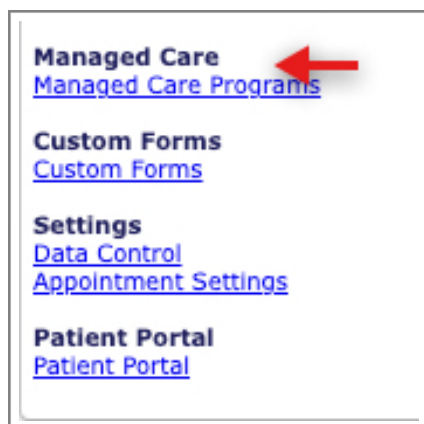
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Next, enter the Managed Care companies within the Insurance Companies section. Adding the Managed Care companies within the Insurance Companies section will allow you to reflect the amount due from the Managed Care company on the patient's invoice. *Please note the Managed Care address and phone number is not needed.*

Further down in the Administration section, click on the **Managed Care Programs link**. Within this section, enter all of the Managed Care programs the clinic accepts. This will allow the clinic to flag a patient with a specific managed care program.

1. Click **create new program**.
 - Enter the program name, description, and maximum number of appointments. (Allowing the system to keep track of the number of managed care appointments the patient has had.)
2. Click **Save**.
 - By entering a maximum number of appointments. This will keep track of how many remaining appointments the patient has with the clinic.



The image shows the 'Add Managed Care Program' form. At the top, there is a 'Managed Care Programs' header with a 'create new program' button (indicated by a red arrow). Below this is a table with columns: Program Name, Description, and Maximum Number of Appointments. The table currently shows 'No Programs Found.' Below the table is a form titled 'Add Managed Care Program' with the following fields:

- Program Name:** TruHearing (required)
- Description:** 3 Free service appointments after evaluation within 1 year, \$65 max service charge after free, L&D \$275/aid - ASH order and collect, Return Fee \$100 paid by TruHearing (required)
- Maximum number of appointments:** 3 (required). Radio buttons are present for 'Number between 1 and 99' (selected) and 'Unlimited' (indicated by a red arrow).

At the bottom right of the form are 'save' and 'close' buttons (indicated by a red arrow).

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Managed Care Programs will show:

Managed Care Programs

[create new program](#)

TruHearing saved!

Program Name	Description	Maximum Number of Appointments
TruHearing	3 Free service appointments after evaluation within 1 year, \$65 max service charge after free, L&D \$275/aid - ASH order and collect, Return Fee \$100 paid by TruHearing Fit \$325/aid	3 Edit Delete

Lastly, the Edit Staff section will allow a privilege to be set for Managed Care. Giving the access to a user will allow the user to edit the number of Managed care appointments a patient has had. They will also be able to edit the managed care status of upcoming appointments.

privileges

- ☒ View Own Appointments
- ☒ View All Providers' Appts
- ☒ View Own Reports
- ☒ View All Providers' Reports
- ☒ View Gross Margin Report
- ☒ Marketing
- ☒ Admin
- ☒ Invoice Cost Capture
- ☒ Insurance Admin
 - ☒ HCFA Billing Report
 - ☒ HCFA Status Report
 - ☒ A/R Aging Report
 - ☒ Sales Report
 - ☒ Includes Invoice Details
 - ☒ Open Invoice Report
- ☒ Text & Email Notifications
- ☐ Manage Reviews
- ☒ Edit Managed Care Appointment

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Adding a New Patient:

When adding a new Managed Care patient, you will be able to add the program on the new patient input screen.

The screenshot shows a patient input form with two main sections: 'identity' and 'managed care'. The 'identity' section includes fields for Title, First Name (Clark), Middle Initial, Last Name (Johnston), Suffix, Preferred Name, External ID, Patient Type (Lead), Insurance Patient, Speech Pathology, Tinnitus, Gender, Date of Birth (Month, Day), Preferred Language (English), and Phone Numbers (Home, Work, Cell, Other). The 'managed care' section includes a dropdown for Managed Care Program (with a dropdown menu open showing options: -- Select One --, Blue Cross Care, and TruHearing), Program Description, and Expiration Date (Month, Day).

Patient Summary:

The Managed Care program that a patient is associated with will display at the top of the Patient Summary. This will also display the expiration date for the Managed Care company, and how many appointments have been used. See Details will allow you to view the description entered for that Managed Care company.

The screenshot shows the 'Patient Summary' page. At the top, there is a header with the title 'Patient Summary' and several buttons: 'patient finance', 'chart history', 'HCFA', 'purchase', 'new appointment', and 'archive'. Below the header, the patient information is displayed: 'Patient: [redacted]', 'Managed Care Program: TruHearing (Exp.: 01/06/2023) [See details](#)', and 'Appointments Used: 0 / Unlimited'. At the bottom, there is a section titled 'identity' with two buttons: 'quick edit' and 'edit full intake'.

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If you need to add a Managed Care program to an existing patient, within the Patient Summary locate the Managed Care section toward the bottom of the screen.

mailings edit

Mail Status: Send Mail
Sycle Templates: Confirmation Letter, Warranty Letter, Thank You Letter, Test No Sale, Repair Rebate Letter, Annual Hearing Letter, Clean and Check Letter, Birthday Letter
Custom Templates: Cancellation Follow Up Letter, Happy Birthday, Cancellation Follow Up Letter(2), Warranty Expiration Letter, Test Letter, HA Birthday Letter, HA Warranty Letter 2, HA Warranty Letter, Birthday Letter, Warranty Expiration Letter - Test UK, Intake Template, Warranty Letter - PA, Copy: one off 1234, Copy: Appointment - one off, Copy: Appointment - one off(1), Appointment Date - Past, Appointment Date - Future, Intake, HA Sale, HA Return, TNS, Hearing Test Entered, Mfr - Warranty Expiration, LD - Warranty Expiration, Extended - Warranty Expiration, HA - Delivery dtae, Appointment Type - Before, Appointment Status, Holiday - After, holiday - before, Appointment/Purchase date, Birthday Letter - FGCHC, ESCO Coverage Letter 1, ESCO Coverage Letter 2, SYC-11976 Test, SYC-12168, SYC-12168 2, Bluewing Test, SYCLE BW Test

mail history

Date Sent	Mail Code	Title	Description
12/11/2016	NEWCRM.77	Thank You Letter	This letter thanks the patient for their decision to seek better hearing through hearing aids. It is used to reinforce their decision and should be sent out the day after the purchase.
12/11/2016	NEWCRM.446	HA Sale	
02/22/2017	NEWCRM.77	Thank You Letter	This letter thanks the patient for their decision to seek better hearing through hearing aids. It is used to reinforce their decision and should be sent out the day after the purchase.
02/22/2017	NEWCRM.443	Appointment Date - Past	
02/22/2017	NEWCRM.446	HA Sale	
02/22/2017	NEWCRM.449	Hearing Test Entered	
02/22/2017	NEWCRM.455	Appointment Status	
02/22/2017	NEWCRM.458	Appointment/Purchase date	
02/23/2017	NEWCRM.450	Mfr - Warranty Expiration	
02/23/2017	NEWCRM.451	LD - Warranty Expiration	
12/21/2017	NEWCRM.457	holiday - before	

managed care view past program add

This patient has no Managed Care Program.

Here you will be able to add a Managed Care program to the patient and enter an expiration date.

Add Managed Care Program ✕

Managed Care Program ✓ -- Select One --
Program Description Blue Cross Care
TruHearing

Expiration Date: Month Day

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Chart History:

When looking at the appointment information in the chart history a new section has been added to show the Managed Care program.

Scheduling an Appointment:

When scheduling an appointment for a managed care patient, you will have a new Managed Care section at the bottom of the New Appointment screen. This will show that the appointment is a Managed Care appointment and which Managed Care program the patient is with.

New Appointment

Patient: Phil J. Dunphey
Orig Ref Src: Newspaper
Orig Sub Ref Src: Chicago Tribune
Managed Care Program: TruHearing (Exp.: 01/06/2023) [See details](#)
Appointments Used: 0 / Unlimited

identity

Address: Patient Type: Current
Phone Number: (798) 678-6786 (home)
E-mail Address:

appointment

Clinic: Dallas TX Date: 01/06/2022
Provider: Joe Healer Time: 11:30 AM
Type: Length: minutes
Referral Source: Status:
Referral Subcategory: Prior Auth. #:
Description: Prior Auth Exp:
Referring Phys:
Notes:
Recurrence: Repeat this appointment:
Repeat: times (not including this one)
OR Until:

appointment companion

Will be accompanied on this appointment:
Relation: Other Description:
First name:
Middle Initial:
Last name:

sytle telehealth

Add/confirm the provider and patient email addresses and click the save/continue button below to create your online telehealth appointment. Your patient will receive an email 30 minutes before their appointment with the link to join.
Will this be a Telehealth appointment:
Provider Email: Patient Email:

managed care

Is Managed Care Program Appointment?: Yes
Managed Care Program: TruHearing

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Depending on the staff permission set within Administration, you may have the capability of changing the Managed Care appointment setting at the bottom of the New Appointment screen.

managed care

Is Managed Care Program Appointment?: ☒ **Yes** ☐ **No**

Managed Care Program: TruHearing

continue

Now that an appointment is scheduled for a patient with Managed Care, the Managed Care information will display in the New Appointment page.

Appointment Summary

Patient: (798) 678-6786

Preferred Name:

Time Since Last Purchase: **2.5 years**

Managed Care Program: TruHearing (Exp.: 01/06/2023) [See details](#)

Appointments Used: 1 / Unlimited

Completing an Appointment:

You will now be able to complete your Managed Care appointment the same way you do for private pay, by entering the hearing loss level and appointment outcome notes. Then make sure yes is selected for purchases and click **save**.

Note: The Managed Care section will show at the bottom of the appointment outcome also. Now that the appointment outcome has been saved a pop up will appear asking if you want to create a Managed Care Purchase.

Managed Care Purchase

Do you want to create Managed Care Purchase?

Yes No

Purchase Summary:

When **Yes** is selected, the system will create a Managed Care purchase summary that will allow you to see what Managed Care program the patient belongs to. The Managed Care purchase summary will also suppress the pricing information for Hearing Aids only and keep the Hearing Aids added to this purchase summary from being calculated in your sales report as a zero-dollar item. Hearing Aids added will show as being covered by Managed Care and now allow you to check these devices in and deliver them through your normal Inventory delivery process.

Purchase Summary

Patient: [REDACTED]

(798) 678-6786

Managed Care Program: TruHearing (Exp.: 01/06/2023) [See details](#)

Appointments Used: 1 / 3

Presets +
Close

Dallas TX
 Alameda West Audiology
 123 Main Street
 Dallas, TX 12345
 USA
 (401) 737-1320

Staff: Joe Healer

Clinic: Dallas TX

Date: 1 / 6 / 2022

Tracking #: [REDACTED]

Invoice #: 04099

Managed Care: Yes

Qty	Item	Description	Unit Price	Amount	Order Tracking (Delivered)	Action
1	Left Hearing Aid	Resound Canta 470 D BTE Digital Mfr Warranty Expires: 01/06/2024 Plan:Default <i>Covered by Managed Care</i>			Check In	edit delete return
1	Right Hearing Aid	Resound Canta 470 D BTE Digital Mfr Warranty Expires: 01/06/2024 Plan:Default <i>Covered by Managed Care</i>			Check In	edit delete return
1	Earmold	Left Earmold: Hearing Aid Earmold	\$50.00	\$50.00	Check In	edit delete return
1	Earmold	Right Earmold: Hearing Aid Earmold	\$50.00	\$50.00	Check In	edit delete return
2	Service	Service: : Truhearing Fitting	\$600.00	\$1,200.00		edit delete return

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You will also want to add the services to this invoice that the clinic will receive payment for.

Service Purchase

Left Column:

- Service: **Truhearing Fitting** (checked)
- Description: **Truhearing Regular**
- Price Per Item: \$600.00
- Quantity: 2
- Total Price: \$1,200.00
- Purchase Price: \$1,200.00
- Purchase Date: 1/6/2022
- CPT: [look up](#)
- Sales Tax: ☐ yes

Right Column:

- Service: **Truhearing Fitting**
- Description:
- Price Per Item: \$0.00
- Quantity: 1
- Total Price: \$0.00
- Purchase Price: \$0.00
- Purchase Date: 1/6/2022
- CPT: [look up](#)
- Sales Tax: ☐ yes

Note: The only services that will appear in the drop down are the ones that were selected as Managed Care service types in Administration.

Reports:

A new report has been created for Managed Care. This report will allow any user with access to the Marketing reports section to pull a list of all Managed Care patients within the clinic. This report will show the Managed Care program, program expiration date and covered appointments along with the standard marketing criteria.

Sytle

Navigation: appointments | reports | marketing | administration

Sales Reports:

- Quick Business
- Sales Summary
- Sales
- Hearing Aid Sales
- Total Sales
- Open Invoices
- HCFA Status
- HCFA Billing
- Aging
- Inventory

Marketing Reports:

- Referrals
- Marketing** (highlighted with a red arrow)
- Appointments
- Appointment Status
- Appointment Result
- Appointment Detail
- Intake
- Provider Availability
- Clinic Availability

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Marketing Lists

Report Type: Managed Care

Patient Type: ☒ Prospect ☒ Current ☐ Lead ☐ Archived

Parent Company: Test Company

Clinics: Dallas TX

Exclude: ☐ Do Not Mail ☐ Do Not Call

Managed Care: Choose patient types from the list above

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

The Sales Report has been updated with a filter to include Managed Care Sales.

Sales Report

Purchase or Return Date

Dallas TX

Clinic Stats

Period: Month

[View Report](#)

View by: Work Week (sun-sat)

Month: Jan 2022

Include Managed Care Sales: ☒ Yes ☐ No

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The Zip Code Sales report will now include Managed Care Service purchases. This has been updated to the Gross Revenue and the Net Revenue columns.

Sales by Zip/Postal Code

Choose
Jan
2022

report by

Dallas TX X

All Providers

Selected Month Only

View Report

Dallas TX

DOWNLOAD

Store	Zip/Postal Code	Gross Revenue	Return Revenue	Exchange Revenue (net)	Cancellation Revenue	Net Revenue	Net Units
Dallas TX		\$1,300.00	\$0.00	\$0.00	\$0.00	\$1,300.00	\$0.00
TOTAL		\$1,300.00	\$0.00	\$0.00	\$0.00	\$1,300.00	\$0.00

Totals: 01/01/2022 - 01/31/2022

Store	Zip/Postal Code	Gross Revenue	Return Revenue	Exchange Revenue (net)	Cancellation Revenue	Net Revenue	Net Units
Dallas TX		\$1,300.00	\$0.00	\$0.00	\$0.00	\$1,300.00	\$0.00
GRAND TOTAL		\$1,300.00	\$0.00	\$0.00	\$0.00	\$1,300.00	\$0.00

The Total Sales report now includes Managed Care Services and Managed Care hearing aid totals. Along with a new column to show if the sale was part of Managed Care.

Total Sales Report

Purchase or Return Date
Start: Jan 1 2022
End: Jan 31 2022

report by

Dallas TX X

All Providers

View Report

Dallas TX

DOWNLOAD

Sale Date	Delivery Date	Return Date	Staff	Patient	Patient ID	Patient Zip	Office	Referral Source	Subcategory	Subcategory Description	Unit/Qty	Type	Product	Description	S/N	Notes	CPT Code	Price Table	Gross Price	Discount	Net Price	Sales Tax	Total Price	Receipt Paid	Managed Care
01/06/2022			Joe Healer	Phil Dunphey	516920	Dallas TX	Web				1	Left Hearing Aid	Resound Canta 470 D	BTE Digital				Default	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N	Y
01/06/2022			Joe Healer	Phil Dunphey	516920	Dallas TX	Web				1	Right Hearing Aid	Resound Canta 470 D	BTE Digital				Default	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N	Y
01/06/2022			Joe Healer	Phil Dunphey	516920	Dallas TX	Web				1	Left Earmold	Hearing Aid Earmold						\$50.00	\$0.00	\$50.00	\$0.00	\$50.00	N	N
01/06/2022			Joe Healer	Phil Dunphey	516920	Dallas TX	Web				1	Right Earmold	Hearing Aid Earmold						\$50.00	\$0.00	\$50.00	\$0.00	\$50.00	N	N
01/06/2022			Joe Healer	Phil Dunphey	516920	Dallas TX	Web				2	Service	Truhearing Fitting						\$1,200.00	\$0.00	\$1,200.00	\$0.00	\$1,200.00	N	Y

SYCLE PRIVATE PRACTICE MANAGED CARE GUIDE

The Sales Summary report has been updated to include Managed Care services but will exclude Managed Care hearing aid purchases.

Within the Quick Business report, the following sections will now include Managed Care services:

- Gross Revenue
- Net Revenues

The following sections will exclude Managed Care hearing aids:

- Gross Units Sold
- Units Returned
- Units Exchanged
- Units Canceled
- Net Units Sold
- Average Sales Price
- Binaural Rate
- Return Rate
- Product Mix by Type
- Product Mix by Technology

The following sections will include Managed Care hearing aids, and Appointments:

- Close Rate
- Close Rate

Lastly, based on the permission type of the staff member, if you have visibility to your Dashboard on the Appointments tab, there is now a new section called Managed Care Services Revenue.

