Provider Portal Quick Guide

Orders

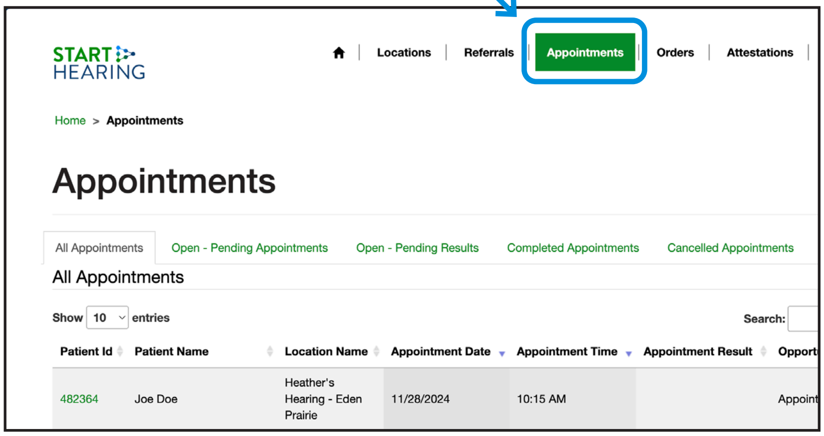
If the patient has been tested and wants to proceed with a purchase, follow these easy steps to place an order.

STEP 1: Login/Locate Patient Appointment

Log into the Start Hearing Provider Portal with the credentials provided by Start Hearing.

Click on the Appointments tab at the top of the screen.

Search for the patient record by using the search feature on the right or by using the tabs across the top:



- **All Appointments** – All Appointments in any respective status.
- **Open – Pending Appointments** – Appointments that are waiting to be scheduled or have a future-dated appointment.
- **Open – Pending Results** – Appointments that have occurred, but the status has not been reported.

STEP 2: Update the Appointment tab

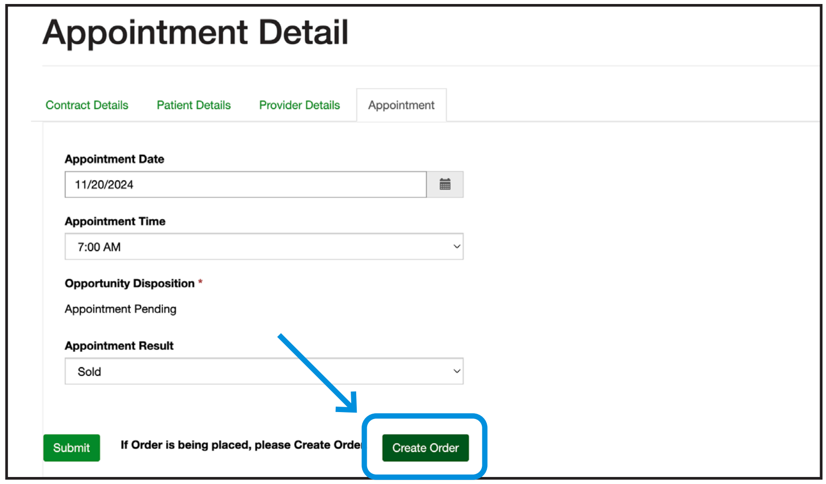
After locating the patient record, navigate to the Appointment tab within.
The Appointment Date and Appointment Time (should already be populated).

- After the appointment has occurred, you will have to select the Appointment Result in the dropdown menu and ***click Submit.***

Appointment Results:

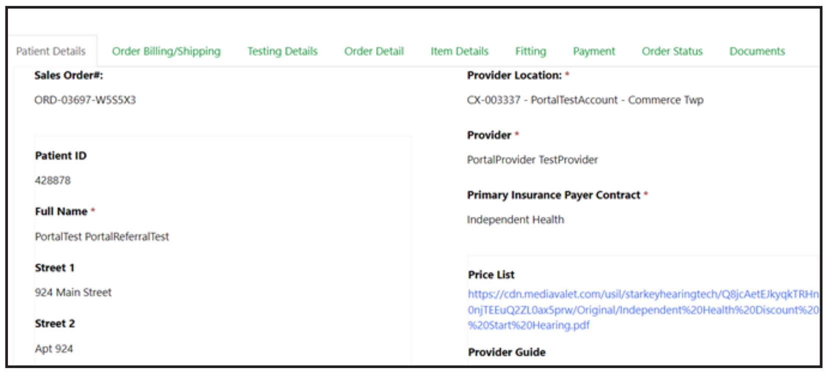
- **Sold** – The patient is interested in purchasing hearing aids.
- **Loss No sale** – The patient tested with a loss, but is not interested in purchasing hearing aids.
- **Medical Referral** – The patient tested with a loss, but it's recommended that they see a medical professional.
- **Insurance** – The patient tested with a loss, has a medical benefit, and is going to submit the claim through that benefit (only in cases where Start Hearing isn't able to bill for the medical benefits).
- **No Show** – The patient was a no show to the appointment.
- **Rescheduled** – The patient wants to reschedule but has not set the date yet. If the patient chose a date to reschedule, you'll update the date in the form.
- **Cancelled** – The patient cancelled the appointment with no rescheduled date.

If the Appointment Result was Sold, after you ***click Submit, click Create Order***.



You will see a message at the top indicating your request is being processed.

This will create an order for you to complete. You will **fill in the first 4 tabs**. Your order will be in a New (or draft) status until you hit the Submit on the Item Details tab and then it will be in a Pending (submitted to Start Hearing) status.



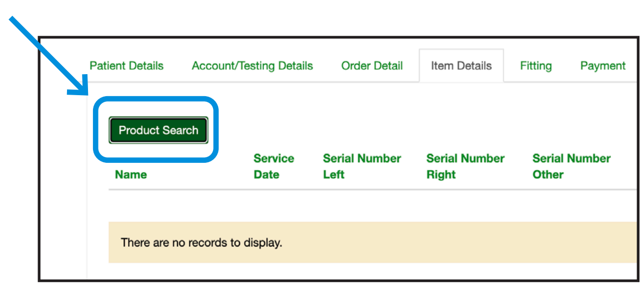
Tab 1: Patient Details - You'll see the demographic information that was entered for the referral.

Tab 2: Account/Testing Details - Select the appropriate Start Hearing Bill-To-Account and enter your office Ship-To-Account. Also select the appropriate Hearing Loss Type and Diagnosis Codes (up to 3) then ***click Submit.***

Tab 3: Order Detail - Similar to an order form, provide the appropriate information. Each field has dropdown options. You can fill in Special Instructions with any additional requests.

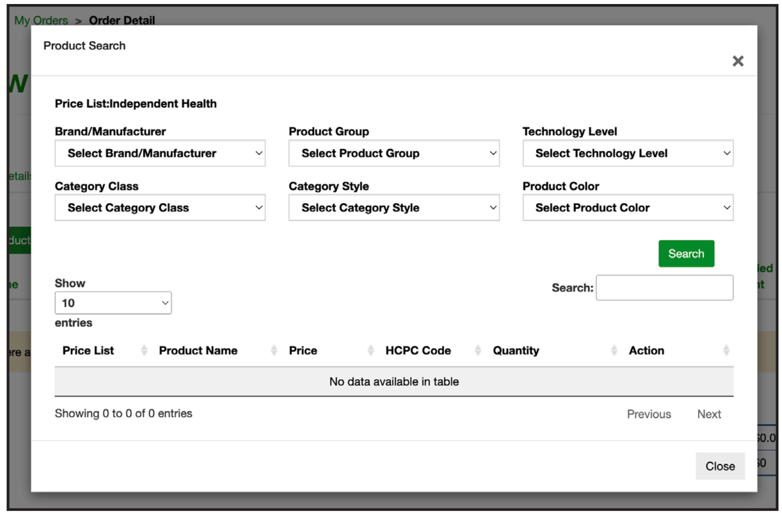
Tab 4: Item Details - This is where you will add the product, service and/or accessory line items pertaining to the patient order.

Click on Product Search. That will open the Product Search window. Use the top dropdown menus to narrow your search accordingly. Then, select your items. You have to select one item at a time. To select ***click Add*** (to the right of that item). When it's been added you'll see a



message at the top indicating "Successfully added sales product". ***Click OK*** to clear that message and add any other item desired.

Once you have added all your items ***click Close*** at the bottom right. That will close out the Product Search window and take you back to the Item Details tab with your items chosen.



If you want to remove an item, ***click the Trash Can*** at the right of that line item.

Once you have reviewed and are ready to submit your order to Start Hearing, ***click Submit*** at the bottom of the Item Details tab.

STEP 3: Orders

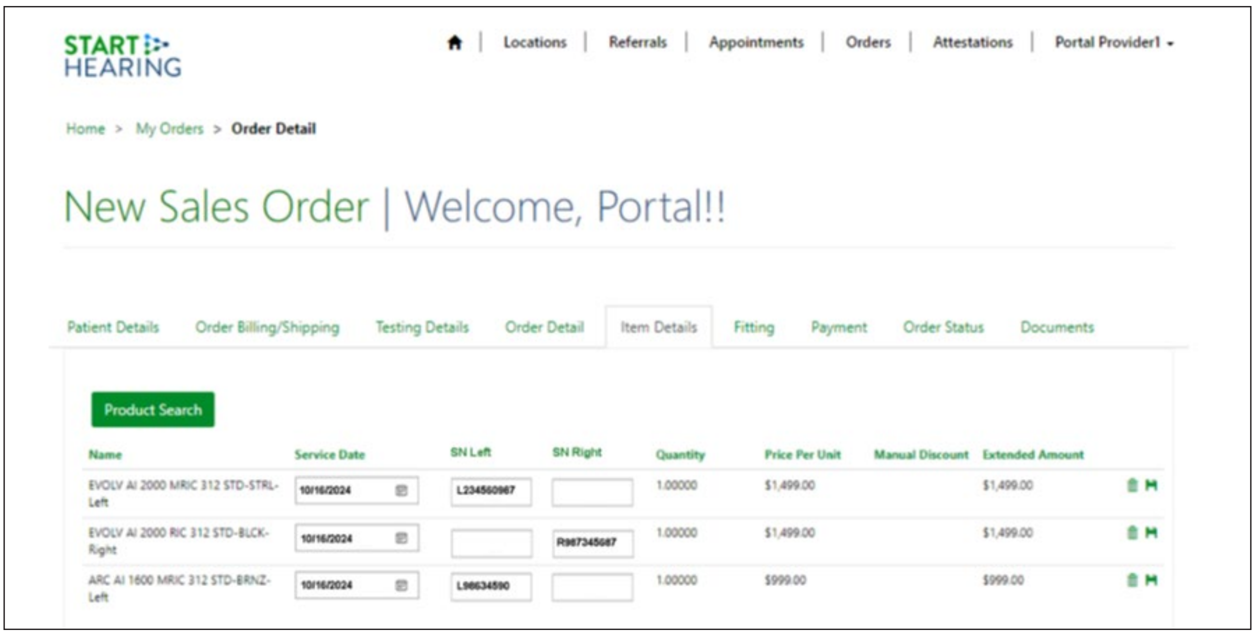
You'll find your orders by selecting Orders at the top.

- **All Orders** – All Orders in any respective status.
- **New Sales Orders** – Orders that you have not submitted and remain in a draft status.
- **Pending Sales Orders** – Orders that have been submitted but not shipped.
- **Pending Fit Documentation Orders** – Orders that have shipped and Start Hearing hasn't received the Confirmation of Delivery document from your office.
- **Completed Sales Orders** – Orders that have received the Confirmation of Delivery document and have been invoiced by Start Hearing.
- **Payments Due Sales Orders** – Orders with payments due and need to be collected at time of fitting.

Fitting

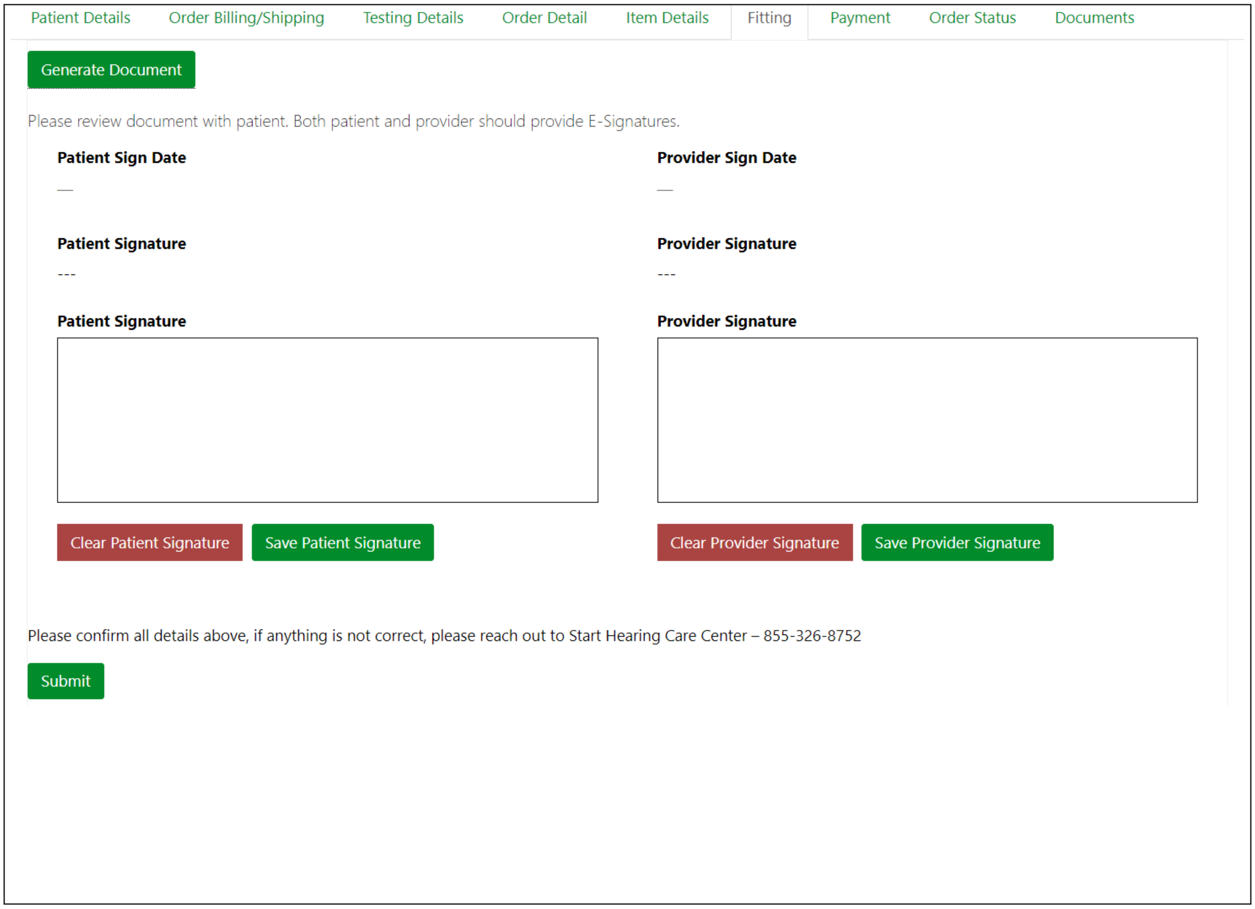
When you have received your shipment of the product, it is time to do your fitting. Go into the portal and open that patient's order.

- ***Click Sales Order Number*** link to get to the Order.
- ***Click Item Details*** tab and enter today's date (date of fitting) for each line item. After each line ***click Save*** to the right of each line (appears as a disk icon).
- The Serial Numbers will populate based on how Start Hearing has entered them into our system. The smaller serial number right and larger number left. Please confirm that you are fitting based off serial number.



Delivery Document

Click Fitting tab and then ***click Generate Document.***



- This will open the **Confirmation of Delivery** form. All information will be filled in, including the Service Date, Serial Numbers and Warranty information, based on the information that has been entered. ***This is an important step, please verify all the information prior to generating the Confirmation of Delivery document.***
- Once the document is generated, you can use the document to review the information with the patient during the fitting.
  - Product fitting and associated pricing
  - Warranty information
  - Trial Period (verbiage included at the bottom of the document)
  - Confirm if any patient out of pocket is due, and review payment with the patient
- ***Click*** back into the ***Order,*** if there is an out-of-pocket payment due, ***click Payments*** tab.

Patient Payment

Click Make Payment which will open up the Payment window. Complete the patient's payment information.

- ***Click*** back to the ***Fitting tab.*** Have the patient electronically sign in the appropriate box and ***click Save Patient Signature.*** Have the provider electronically sign in the appropriate box and ***click Save Provider Signature*** then ***click Submit.*** This will automatically send the Confirmation of Delivery form to the Start Hearing Claims Team with portal signature information.