AESTHETIC RECORD

QUICK Start

Your guide to Booking, Charting, and Checking out Your First Patient...
ALL IN RECORD TIME

AESTHETIC NEXT Powered by AR

LEADAR

AESTHETIC RECORD MARKETPLACE

XCCELERATOR POWERED BY AR AESTHETIC RECORD

FOR THE RECORD

AN PRODUCTIONS

AR SYNC Powered by YEXT

AESTHETIC RECORD QUICK Start

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AESTHETIC RECORD QUICK Start

You've made a great decision to move forward with AR!

Follow These Steps to Book, Chart & Checkout Your First Patient!

1 Confirm Your Access

- Bookmark and log in to the web **here.**
- Download the mobile app (IOS only) **here.**
- Log in to the app with your AR credentials.

2 Set Up Your Business & Your First Clinic

- **Set up your Clinic Name using this guide.**
  - You can follow these same steps to set up multiple clinics if needed.
- **Complete your business information using this guide.**

3 Set Up Your Profile and Team

- **Complete your profile using this guide.**
- **Use this guide to:**
  - Enable provider permissions (If you are a provider).
  - Add your Medical Director (if required).
  - Add teammates and assign roles.

4 Create Your First Service to Start Booking Appointments

- **Follow this guide to set up your first service for booking.**

Attaching consents, questionnaires and treatment instructions will be addressed in Step 6.

5 Create your Provider Schedule

- **Create a provider schedule using this guide**

Important: Business Hours ≠ Booking Hours

- Your business hours show when your business is open.
- Your provider schedule shows when you are available for appointments.
- Clients can only book when you have a provider schedule set.
- Just setting business hours is not enough.

6 Adding consents and Questionnaires

- **Gather your existing consent and questionnaires.**
  - If you don't have any, visit the **AR Marketplace**.
- **Decide how to organize your documents**
  - You can create consents and questionnaires for each service **or** combine them for similar treatments.
- **Include all necessary forms**
  - **Don't forget to add:**
    - Social media release forms
    - General consents that every client should sign
- **Guide to Create Consents**
- **Guide to Create Multiscale Questionnaires**
- **Guide to SImple Questionnaires**

7 Set Up Email & SMS Confirmations & Reminders

- **You can send confirmations and reminders when:**
  - You book a client in AR
  - A client books online
- **Set up these messages in the appointments tab.**

TIP** Set up your own inbox to text back and forth with clients. Available with the Accelerator Plan—just enable the Two-Way Inbox feature for only $5/month.

- **Set your email & SMS confirmations using this guide.**

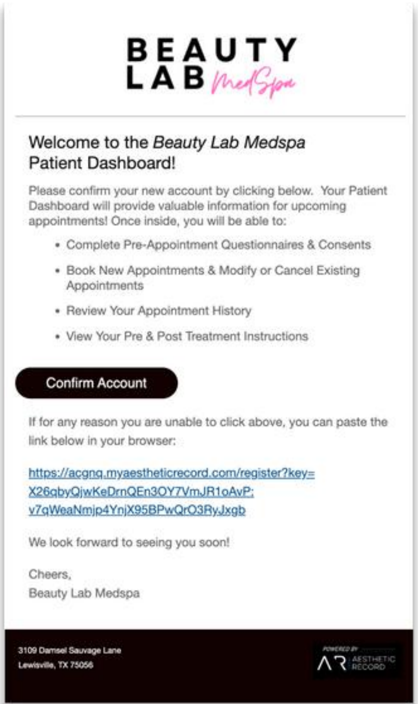
TIP** Add your Patient Portal login snippet to texts too , so patients can access their link by email or text.

8 Turn on Access to the Patient Portal

- **The Patient Portal setup is optional,** but highly recommended.
- **Benefits of activating the Patient Portal**
  - Clients can complete paperwork before their appointment.
  - Clients can book and edit appointments through the self-service portal.
- **Completed consents and questionnaires:**
  - Are instantly available in the client’s profile
  - Are automatically attached to the treatment record for easy access
- **Set up your Patient Portal using this guide.**

Example Notifications When an Appointment is Booked

Patient Portal Invite



BEAUTY LAB MedSpa

Welcome to the *Beauty Lab Medspa* Patient Dashboard!

Please confirm your new account by clicking below. Your Patient Dashboard will provide valuable information for upcoming appointments! Once inside, you will be able to:

- Complete Pre-Appointment Questionnaires & Consents
- Book New Appointments & Modify or Cancel Existing Appointments
- Review Your Appointment History
- View Your Pre & Post Treatment Instructions

Confirm Account

If for any reason you are unable to click above, you can paste the link below in your browser:

https://acgnq.myaestheticrecord.com/register?key=X26qbyQjwKeDrnQEn3OY7VmJR1oAvP;v7qWeaNmjp4YnjX95BPwQrO3RyJxgb

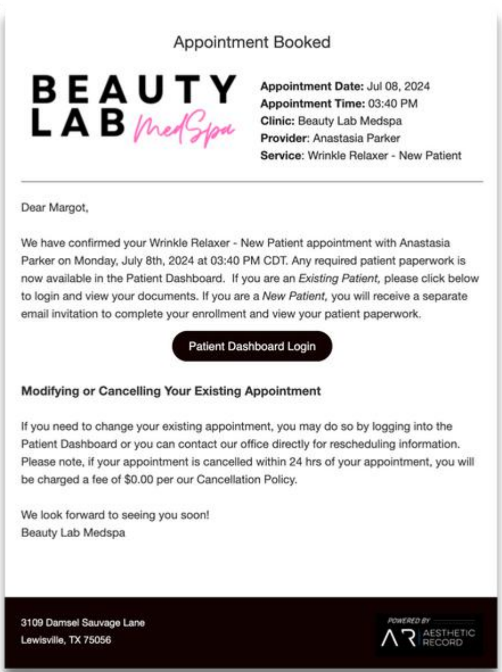
We look forward to seeing you soon!

Cheers,
Beauty Lab Medspa

3109 Damsel Sauvage Lane
Lewisville, TX 75056

POWERED BY AESTHETIC RECORD

Appointment Confirmation



Appointment Booked

BEAUTY LAB MedSpa

Appointment Date: Jul 08, 2024
Appointment Time: 03:40 PM
Clinic: Beauty Lab Medspa
Provider: Anastasia Parker
Service: Wrinkle Relaxer - New Patient

Dear Margot,

We have confirmed your Wrinkle Relaxer - New Patient appointment with Anastasia Parker on Monday, July 8th, 2024 at 03:40 PM CDT. Any required patient paperwork is now available in the Patient Dashboard. If you are an *Existing Patient*, please click below to login and view your documents. If you are a *New Patient*, you will receive a separate email invitation to complete your enrollment and view your patient paperwork.

Patient Dashboard Login

Modifying or Cancelling Your Existing Appointment

If you need to change your existing appointment, you may do so by logging into the Patient Dashboard or you can contact our office directly for rescheduling information. Please note, if your appointment is cancelled within 24 hrs of your appointment, you will be charged a fee of $0.00 per our Cancellation Policy.

We look forward to seeing you soon!
Beauty Lab Medspa

3109 Damsel Sauvage Lane
Lewisville, TX 75056

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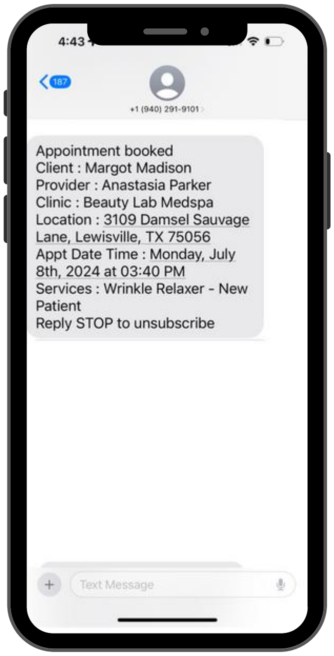
Notification of Booking Sent to the Practice



Confirmation of Booking Sent to the Patient

Let's Put Everything Together, and Book Your First Appointment!!

9 Book an Appointment

- The web and AR Provider App work almost the same.
- Use this **guide** to learn how to book an appointment.
- Watch the videos below to see how it works in the AR Provider App.
-

10 Add an Inventory Item

To start charting, link inventory items to your services:

- **Services =** What clients book
- **Inventory =** What you chart

Start with:

- Add a microneedling tip and a filler.
- Use preloaded items (like wrinkle relaxers) as examples.
- Learn more in the Core4 Inventory Overview.
- Planning to offer GLP-1s or memberships? Learn about Pricing Variations **here**.
- **Use this guide** to add common treatments to your inventory.

Quick Walkthrough of Charting a Client Procedure

11 Chart a Procedure

- **Use the Aesthetic Record Provider App to:**
  - Create chart documentation.
  - Take procedure photos.
  - Add treatment markings and notes.
  - Log inventory for products used.
- **Important:**
  - Use the AR App — it's optimized for room-to-room use.
  - The web version isn't ideal for photos or charting templates.
- **Use this step-by-step charting guide.**

12 Enable AR Pay

- **Benefits of AR Pay:**
  - **Automates:**
    - Cancellation Fees
    - Membership charges
    - Patient wallet management
  - **Chart-To-Cart feature:**
    - Converts charting procedures directly into invoices
  - **Accurate reporting on:**
    - Prepayment & cancellation fees
    - Inventory & service usage
    - Sales metrics from patient procedures
- **Getting Started:**
  - **Step 1:** Turn on AR Pay/POS using this **guide**.
  - **Step 2:** Order your card reader **here**.

13 Create Your Appointment Cancellation Policy

- **Why it matters:**
  - Deters no-shows and last-minute cancellations
  - Helps recover lost revenue
  - AR will automatically charge clients who violate the terms of your cancellation policy, saving you time.
- **How it works:**
  - Set your business rules (e.g., cancellation timeframe)
  - Once a client agrees to your policy during booking, AR handles enforcement and charges the applicable fee if terms are broken
- **Important tips:**
  - Enable your cancellation policy using this **guide**
  - **Make sure your policy is:**
    - Clear and easy to understand
    - Displayed during online booking
    - Acknowledged by clients before booking is confirmed
    - A strong, visible policy protects your business in case of disputes

Let's Explore More Point-of-Sale Features!

14 Checking Out a Client Post-Procedure

- **Checkout Process After a Treatment**
  - Use the AR Provider App (or web) to check out clients right after the treatment.
  - Prepare the invoice directly from the app as you complete the procedure.
  - Checkout triggers key data for Business Insights reporting.
- **Chart-to-Cart functionality**:
  - Converts charted procedures into invoice items automatically
  - Reduces manual entry and errors
  - Creates a clear audit log for revenue tracking
- **Accepting Payments**
  - With your Point-of-Sale enabled and card reader connected, you're ready to take payments. **Waiting on your card reader to arrive?** Use **Text to Pay** and/or **Tap to Pay** on iPhone to start taking payments while you wait for it to arrive.
  - Click **here** for a full walkthrough of the post-treatment checkout process.
  - Watch the video below to see Chart-to-Cart and checkout in action.

Click Here To Connect a Card Reader to Your Account

BBPOS WisePOS Wifi Reader
$249

M2 Bluetooth Reader
$59

S700 WiFi Reader
$349

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View your First Sale

Here's what you've accomplished:

- Booked and created your first patient appointment
- Documented the visit using AR's seamless Chart-to-Cart workflow
- Completed a full client flow from start to finish

Next Steps:

- Check out your **Business Insights** to see how this impacts your bottom line
- Get familiar with reports to help you:
  - Make informed business decisions
  - Assess performance
  - Track key metrics

Click here for a guide on viewing sales and client encounter report

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View & Sign your First Client Chart Through the Provider's Room

- **Final Step: Sign & Finalize the Chart**
  - Head to your Provider Room to complete the process
  - Review and finalize everything documented during the appointment
  - Ensure all notes, paperwork, and traceability tasks are complete
  - Sign the chart to finish the book–chart–checkout workflow
- **Click here to take a quick tour of the Provider Room**
- **Need to send the chart to your Medical Director?**
  - Add your MD as a user in the system
  - Refer back to Step #3 for instructions on adding a Medical Director

Congrats! You're Off to a Quick Start

Next Steps

- **Bookmark and share this LINK with your team for booking OFFICE HOURS for 1:1 assistance from our Client Success Coaches and accessing ALL Client Resources (Core4, Learning Lab and Workshops)**

- **Schedule your Welcome Call with your Onboarding Specialist**

- **Start your Core4 Training Videos -Sign up HERE**

- **Sign up for our LIVE Virtual Workshops HERE or find our ON DEMAND Workshops HERE**

- **Subscribe to our What's New page HERE to receive announcements and email notifications of new feature releases and updates!**

- **Live Chat Support**
  - **Found in the lower right-hand corner of your screen when logged onto the web or by clicking SUPPORT on your PROVIDER APP.**
  - **Monday-Friday 8:00 AM- 10:00 PM EST**
  - **Saturday & Sunday 9:30 AM- 9:30 PM EST**

You will be asked a series of automated questions. Continue until the screen says "Connecting you with a LIVE agent."

QUICK Tips & Tricks for Using Your AR iOS App

Downloading the Aesthetic Record App

1. Open the App Store on your iPad or laptop (if you have an Apple laptop with M2 chip or newer).

Link: **https://apps.apple.com/us/app/aesthetic-record-emr/id1228049519**

- Download the app & test your login!

Keeping your Device Software Updated

1. Go to Settings on your iPad and tap on General.
2. Select Software Update.
3. If an update is available, tap Download and Install. Make sure your iPad is connected to Wi-Fi and plugged in if the battery is low.

⭐ ***Set your device to automatic updates to avoid this step!***

Keeping the Aesthetic Record App Updated

Before logging in for the day

1. Open the App Store on your iPad.
2. Tap on your profile picture at the top right.
3. Scroll down to see if any updates are available for the AR app and if so, tap Update next to it.

⭐ ***Set your app to automatic updates to avoid this step!***

Daily Morning Routine Before Logging In

- Make sure your iPad & your card readers are charged & ready.
- Logout and login back into your app just in case any updates have occurred overnight and haven't been automatically downloaded.
- If you are not using automatic downloads, head to the app store and make sure you are using the most up-to-date version of AR.

QUICK Tips & Tricks for Card Readers

Handling and Caring for Your Stripe M2 (Bluetooth) Card Readers

- **Before you start:**
  - Fully charge your card reader before first use.
- **Daily tip:**
  - Charge your card reader overnight—just like your phone!
- **Pairing reminder:**
  - Each card reader can only be paired with one iPad. If you have more than one at your clinic, use colors or numbers to keep track of which reader goes with which iPad.
- **Troubleshooting:**
  - If you need to fix or re-pair a reader, keep this troubleshooting **guide** nearby!

Handling and Caring for Your Stripe BBPOS WisePOS-E (WiFi) Card Readers

- **Getting Started:**
  - Charge your card reader fully before first use.
- **Ongoing Use:**
  - Keep the BBPOS WisePOS E plugged in and powered on—even when not in use—so it gets automatic software updates.
- **Network Reminder:**
  - This reader uses your local WiFi. If you change networks or have connection issues, that could affect it.
- **Need Help?**
  - Keep the troubleshooting **guide** nearby in case you need to reconnect or fix the reader.

Inventory Glossary

Product Name	While this may seem obvious, there are few key things to know about your product naming convention. Your inventory items should reflect the inventory names that you buy from the manufacturer. Names should match the physical product on the shelf- that. means all settings also match the physical product. You can use pricing variations and packages to create name/price combinations later on, but for your foundational inventory items, use the product name and unit of measure that matches how you order and purchase from the manufacturer. (i.e. Dysport is the inventory item, and Crows Feet or VIP Dysport are considered pricing variations. Set your inventory to Dysport, then you will add it as the building block of your variations or packages)d
Inventory Type	This is a pre-set dropdown. You have three choices: retail, service or medical supplies. You can only add lot # traceability under services, so be sure to classify things you need to trace as a service. For retail and medical supplies you can add units per clinic for accurate counting, just not lot numbers.
Product Category	Categories are helpful for grouping products together based on similarities of of your choosing. For example, you may choose to group products based on supplier or based on type. Category sales are reportable, and they can be used to set similar tax rules. Additionally, they can be used when creating discounts and promotions. For example, grouping all wrinkle relaxers together will help you monitor overall category sales across all included products or create a discount on all wrinkle relaxers. Conversely, if you group all Galderma products together, it is helpful to see sales across a manufacturer, instead.
Product Type	This pre-defined list of product types helps group things together based on how they are charted. Once you select a product type, it will pre-populate the unit type settings. Don't worry if something doesn't match exactly as long a your charting options are correct.
Cost to Company	Set your CTC as your wholesale invoice amount. This is easy for items that are sold by increments of 1 such as a syringe of filler or microneedling tip. Remember, if a product is sold in batches or multiple units come in a single container, you'll want to set the CTC per unit. A great example of this is toxin.You purchase a vial for $600 which has 100 units. Your CTC is $6 since there are 100 single units within that vial. If you set your CTC based on the vial instead, it will mean for every $6 unit you sell, it costs you $600 in your reporting.
Aspire Product	Aesthetic Record is fully integrated with Galderma ASPIRE Rewards. Once you turn on the integration, you will have an option to map products from your inventory to ASPIRE products for proper reward redemption. If you want to remap at any point or you add a new product that is eligible for rewards, you can use the dropdown here to accomplish this.
Link to Jeuveau	Aesthetic Record offers you a QuickConnect option with Evolus Rewards where you can move back and forth from the AR Patient Wallet and the Evolus Rewards login to redeem and apply rewards. To make this function work properly, you will need to link your Jeuveau inventory item by toggling this one. Once that is done, the Evolus reward can be applied with the QuickConnect funtion.

Inventory Glossary

Description	Add any information you'd like regarding the product. In more common products, we may have this information pre-populated in our Master Directory.For items unique to your practice, you will want to add a brief description.
Unit Type	Based on the product type you selected, a pre-defined set of unit measurements will appear. Consider the unit type as the unit of measure for charting. For example, if you want to chart filler, you would select ML vs. wrinkle relaxer would be per unit.
Injectable Type	If the product and unit type are for an injection, only then will injection type appear. There is a pre-set list to choose from. This list is not exhaustive, but it should include a general categorization of all injectable products.
Count By	This field is linked to how you will chart. If you want to chart by 0.1mL for filler, you'll count units by 0.1. You'd want to count toxin by 1, and you may want to count GLP-1s by .01 or .001.
Start At	This is where you will being counting once you chart. If you want to start a treatment at 0.5mL, you can start there and still count up by 0.1mL. For toxin, you'd want to start at 1 and count by 1.
Product Ratio	This isn't applicable to most products, but if you see it in the AR system and you are curious, here's an overview.This is a great option if you are doing Dysport and Botox/Juveau/Xeomin. You can set your ratio to 1:3 which means you can chart in "Botox" units, and the system will automatically convert them to Dysport units for you and deduct the right amount of inventory.
Bill for the Whole Unit	When toggled on, this will result in any treatment with a partial unit still being charged for a whole unit. As an example, if a client receives 0.75mL of filler, it would still charge them for a full syringe. If this is not toggled on, the price displayed in the cart will equal the percentage of the product.
Product Price	Under the pricing tab, you can set the price by clinic, and you can also set a member price. This is the price that is patient facing prior to any discounts or promotional offerings.
Traceability	For service items with lot numbers, you can use traceability to assign which inventory batches were used for a particular procedure. You will add lot numbers & batches in for each clinic, and you can set up notifications to alert you to low stock or no stock issues.
Custom Tax Rule	You can set tax rates for categories which will be applied to every product included in that category. However, you can set a custom tax rule for a specific product that will override that category tax rate.