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

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AESTHETIC RECORD QUICK Start

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

This QuickStart Guide is designed to help you go live with Aesthetic Record in a few, easy steps. But, this is just the start! We've created a entire virtual academy, ***Core4***, to teach you everything you need to know about your new system. In addition, our Client Success Coaches will partner with you along the way via live training calls to make sure you feel confident & knowledgeable with every feature. But for now, our priority is to help you get up and running, ***All in Record Time!***

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

1 Confirm Your Access

First things first, let's make sure you have access! Bookmark & login to the web via this link: **https://app.aestheticrecord.com** then, head to the Apple Store & download the Aesthetic Record app via this direct link: **https://apps.apple.com/us/app/aesthetic-record-emr/id1228049519** Once downloaded, make sure you can login! *Please note, Aesthetic Record works best with Google Chrome, Firefox and Safari.*

2 Set Up Your Business & Your First Clinic

Once you've logged in, the first step is to complete your business information. **Click here for a quick guide.** Once that's done, the next step is to set up your clinic name. This is the name that client's will see when they book, receive communications & pay an invoice. You will find this information under your Settings wheel. **Click here for a quick walkthrough of your clinic setup.** You can follow these same steps to set up multiple clinics if needed.

3 Complete Your Admin Profile

Next up, you will want to complete your profile and designate yourself as a Provider or add other teammates who will be working with you. **To get started, click here to begin customizing your profile.**

4 Complete Your Provider Profile and/or Add Teammates

If you will be Provider of your clinic, you need to enable your user profile for Provider permissions. If your licensure requires Medical Director supervision, you will want to add your MD as soon as you can so that you can properly route your completed charts for signature. **Click here for instructions on adding teammates & adding Prescriber privileges to your profile.**

5 Create Your First Service to Start Booking Appointments

In order to book your first client appointment, you will need to set up at least one service! ***Services are appointments-*** these are what clients see when booking online. **Click here for instructions on setting up your first service for booking.** *Attaching consents, questionnaires and treatment instructions are in the steps following, you do not need to address those actions just yet!*

6 Configure Your Confirmation & Reminder Communications

Whether you book a client's appointment for them inside of AR or the client books online, you have the option to send email & SMS confirmation and reminder communications. You will configure these communications from the Appointments tab. As you are getting started, you can use our general AR inbox to send, but overtime, we recommend activating your own inbox so that you can two-way text with clients. **Click here for a step-by-step guide to setting up your email & SMS booking and reminder communications.**

7 Turn on Access to the Patient Portal

While this is not required to get started with Aesthetic Record, we always recommend activating your Patient Portal so that your clients can complete their paperwork prior to the appointment so they can access the self-service portal for booking and editing their appointments. When clients complete their consents and questionnaires in the Patient Portal, those will be available to you immediately from the client's profile. Additionally they will be attached to the treatment record so anytime you view the chart from that appointment, the paperwork is available. **To setup your Patient Portal, click here for instructions.**

8 Add Your Consents & Questionnaires to Your Services

Now we are going to finish up your service to get it ready to be sent via the Patient Portal! At this point, grab your existing consents and questionnaires or if you do not have any, you can visit the **AR Marketplace** to find consents from several of our vendor partners.

You can choose to create consents and questionnaires for each service or lump them together for similar treatments. Don't forget to include any social media releases or other general consents you want every client to sign! Let's start first with how to create your documents. **Click here for a client documentation walkthrough.**

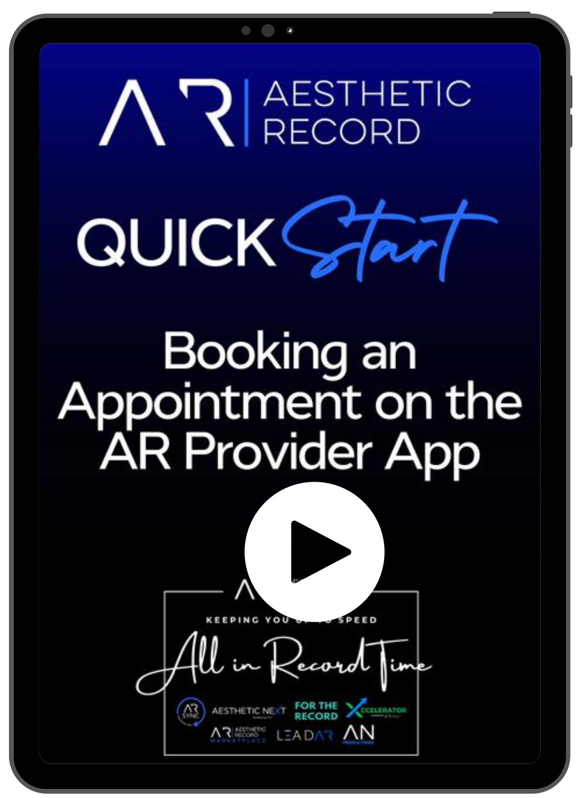
9 Create a Provider Schedule

If you are ready to start booking appointments, your next step is to create your Provider Schedule. If you do not have an available schedule, you will be unable to book clients, so this is a critical step! We can’t stress enough the benefits of prebooking a client’s next visit, and using recurring schedule templates will allow you to set a consistent schedule and allow it to repeat for any period of time. That makes it easy to set that next toxin visit 3 months out! **Click here to start building your schedule with our step-by-step guide.**

Let’s Put Everything Together So Far, and Book Your First Appointment!

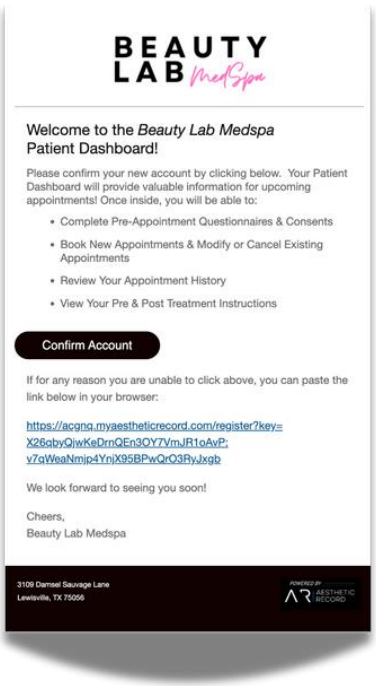
10 Book an Appointment on the Web

Now that you have all the pieces in place, it’s time to book your first appointment! Because the web and AR Provider App operate in nearly the same way, **we’ve included an instruction guide here only for the web.** Checkout the videos below to see the AR Provider App in action!

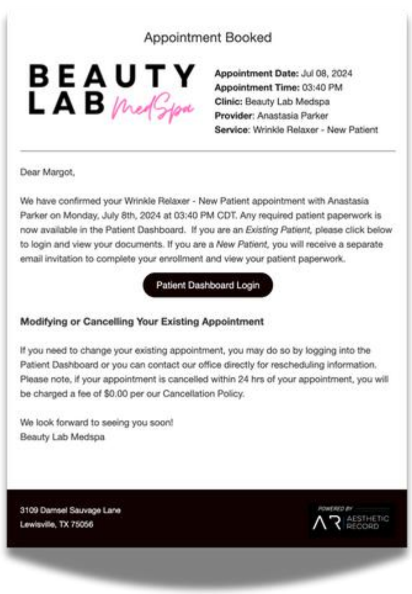


Example Notifications When an Appointment is Booked

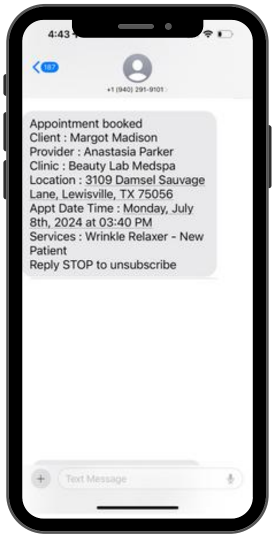
Patient Portal Invite



Appointment Confirmation



Notification of Booking Sent to the Practice



Confirmation of Booking Sent to the Patient

11 Add an Inventory Item

To start charting, you will need to add inventory items to correspond to your services. As a reminder, Services are how Clients book an appointment where inventory is how you chart them,.

There are several options with inventory that you will want to learn over time. For now, we are going to focus on adding a microneedling tip and a filler. Your new account already comes preloaded with a few products in your inventory, including wrinkle relaxers, so you can use those as additional examples. Take advantage of the in-depth inventory overview in Core4 once you master the basics! We strongly recommend learning about Pricing Variations if you will be doing GLP-1s or memberships in the future! **Click here for a how-to guide for adding a few common treatments to your inventory.**

Quick Walkthrough of Charting a Client Procedure

Now it's time to chart your first procedure using the Aesthetic Record app! Charting procedures is where you will create your client's chart documentation for their visit, take their procedure photos, add treatment markings and procedure notes, and add inventory for each product used. One thing to remember, we have optimized charting for the AR Provider App since it's intended to go with you from room to room, client to client, with ease. The web is not well suited for procedure that require a photo or charting template. You will want to be sure and use the app for those! You can **click this link for a step-by-step guide to charting, and feel free to view the short video below!**

12 Turn on your Point-of-Sale & Order a Card Reader

One of the biggest ways AR can help you save time & increase efficiency is with our integrated Point-of-Sale. This feature provides automations for online booking and cancellations, membership charges, patient wallet, and most important for now, our Chart-To-Cart functionality which takes your charting procedures and creates the invoice for you. Connecting the POS also helps you accurately capture reports based on the history of scheduled appointments using prepayment and cancellation charges, the usage of your inventory and services, as well as the sales metrics of services provided when charting Patient procedures. As your first step here, **refer to this guide** for turning on and setting up your point-of-sale in Aesthetic Record.

As soon as you turn on your POS, be sure to order a card reader(s) so you are ready to go for in person payments. **Click here to start your card reader order.**

Once you activate your POS, our Implementation Team will help you with additional resources to get acquainted with your POS & how to manage disputes, payouts & reconciliation, Klarna, Cherry & Text-to-Pay!

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

13 Checking Out a Client Post-Procedure

Once you finish your treatment, it's time to checkout your client via the AR Provider App, This can also be done on the web, but in both cases, you will prepare the invoice from the Provider App as you complete the treatment. When you checkout in AR, you generate key information that fuels your Business Insights reporting. And with the chart to cart functionality, it eliminates going back and forth, keying information between systems, which significantly increases your accuracy and provides an audit log so you know where and how revenue is flowing through your practice

With your point-of-sale enabled and card reader connected, you are ready to start accepting payments from your clients! . **Click here for a walkthrough of the post-procedure checkout flow.** View the video below to see our chart-to-cart functionality and checkout procedure in action!

Click Here To Connect a Card Reader to Your Account

BBPOS WisePOS Wifi Reader
$270

M2 Bluetooth Reader
$70

14 Create Your Appointment Cancellation Policy

Now that your point-of-sale is enabled, you can create your cancellation policy for scheduled appointments! The cancellation policy in Aesthetic Record is an important tool to deter last minute cancellations and no-showed visits and to help you recoup some revenue for the lost time. The good news is once a client books with you and is enrolled in the policy, if they violate one of our business rules (i.e how many days out can they cancel without a penalty), AR will automatically charge them the fee- you don't have to do anything! We will manage that process for you automatically. . **Click here for a guide to enabling your cancellation policy for appointments.** As you write your policy, remember it will show up in the online booking portal, an Clients must acknowledge it to book. Make sure it is clear and direct and explains the expectations of the client and the financial impact to a last minute cancellation. This will protect you in case a client decides to dispute a fee later on !

15 Now it's Time to View your First Sale!

Way to go! You have successfully finished your first client encounter from start to finish with Aesthetic Record! From creating and booking your first patient appointment, to documenting the visit through AR's seamless Chart-to-Cart client flow, the next best thing is to see how this translates to your bottom line via Business Insights. We recommend taking the time to get familiar with viewing reports in your account so you can leverage these metrics to make decisions, assess performance, and more. **Click this link for a guide on viewing your sales and other helpful reports related to client encounters.**

16 Last Task! View & Sign your First Client Chart Through the Provider's Room

The last step to finish the entire book-chart-checkout process is to finalize and sign the chart. You can do this in your designated Provider Room. Here you can audit what you have documented during the appointment and make sure that all paperwork, notes and traceability tasks are complete. **Click here to take a tour of the Provider's Room and learn how to use it!**

If you need to send your chart to your Medical Director after signing, you will need to add your MD as a new user in the system. Refer back to #4 for information on adding a Medical Director as a User.

Congrats! You're Off to a Quick Start

You've taken a giant leap toward making Aesthetic Record an operational asset to your Practice! The steps listed in this guide are key to getting started, but they barely scratch the surface of what AR can provide as you grow and scale your Practice.

Core4 Onboarding

Your next steps are to begin your **Core4 Onboarding**. Core4 will provide guidance on how to best use AR from A-Z. In addition to 4 on-demand modules packed with helpful tips and how-to guides, you will have access to live, virtual workshops, as well as 2 45-minute meetings with your Client Success Coach, to help you bring it all together!

Sign up for Core4 here

For Core4 related questions, also feel free to reach out to clientsuccess@aestheticrecord.com

Live Chat Support

For those times when you need a little extra help, our Client Support Agents are standing by to help! Look for the chat bubble on the lower right hand of your screen when you are logged into the web or by clicking **Support** on your Provider App menu to connect to a live agent!

You can connect with a live agent during the following times:

Monday-Friday 8:00 AM-10:00 PM EST
Saturday & Sunday 9:30 AM-9:30 PM EST

If you need help outside of these hours, feel free to leave us a note, and we will reach out as soon as we're back online.

Ticketing

If an issue requires more assistance than we can provide via chat, we will create a ticket for you so that you can track our progress as we resolve it. We may also escalate your issue to another team who can get your problem solved faster. In either case, we will communicate with you throughout the process **so you are always informed of what's happening.**

Let's Look at a Recap of Your Onboarding Resources with our Client Success Coaches

CORE4 Offer & Signup: Click the link HERE to signup

CORE4 Portal Login: Click the link HERE to login
- We recommend bookmarking this tab, so that you can access and login to your Core 4 easily.

Live Virtual Workshops with Client Success Coaches:
View the schedule HERE
- Offered weekly and for anyone to join!

Office Hours hosted daily by our Client Success Coaches:
Click the link HERE to view and schedule
- Looking for personalized guidance? Join our office hours for a 10-minute session with a coach. Get answers to your questions, discuss your goals, and receive tailored advice.
- Sessions are *first-come, first-served* based on when you join the meeting so please anticipate a waiting period.
- At the time of your scheduled Office Hours, you will be placed into breakout rooms within the Zoom Meeting, where you can have a quick 10 minute meeting for questions and assistance as needed.
- **Office Hours Schedule**
  - M-W-F: 10:30-11:30 AM CST and 2:30-3:30 PM CST
  - T-TH: 9:30-10:30 AM CST and 3:30-4:30 PM CST

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

1. *Before logging in for the day*
2. Open the App Store on your iPad.
3. Tap on your profile picture at the top right.
4. 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 & Staying Up-to-Date with Announcements from Us

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

- Give your card reader a full charge before using it for the first time.
- We recommend charging your card reader each night, like you would an iPhone!
- Once a card reader is paired to an iPad, it *can't* be used to checkout on a different device. If you have multiple card readers being used at the same clinic location, identify which card reader and iPad are paired by a color or number indicator!
- Should you need to troubleshoot or disconnect and reconnect a card reader, keep **this troubleshooting guide** handy!

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

- Give your card reader a full charge before using it for the first time.
- Even when it's not in use, leave the BBPOS WisePOS E *plugged in and powered on* to receive automatic software updates.
- Since this reader connects to your local network, keep this in mind if you ever change networks or are facing WiFi issues.
- Should you need to troubleshoot or disconnect and reconnect a card reader, keep **this troubleshooting guide** handy!

Stay in the Know With Helpful Announcements and Updates

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

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.