



Memo User Guide: Admin/CSR

Introduction

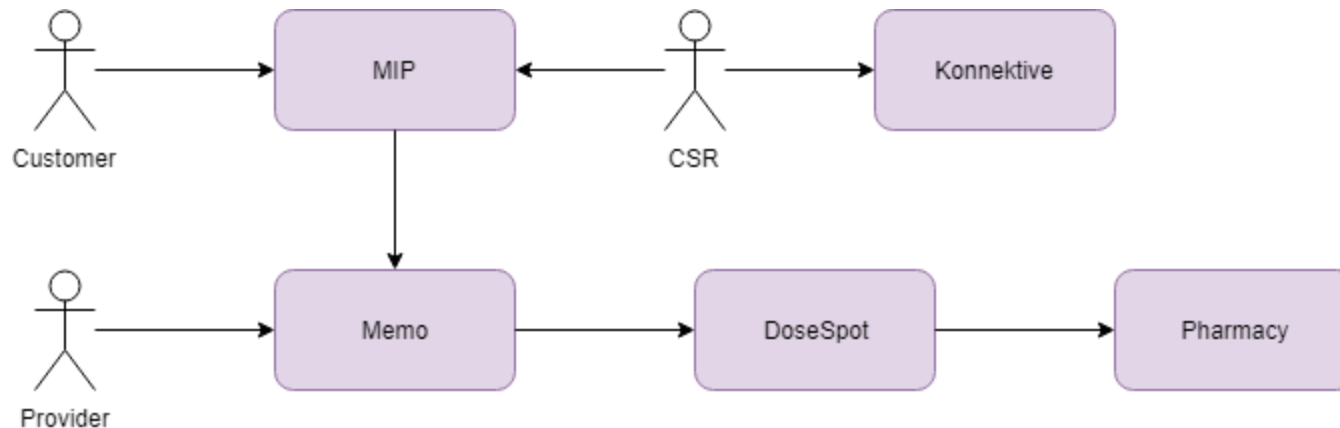
- Scope and Purpose
 - Memo connects ordering, medical history, customer service, and order approval into one convenient location.
 - In this release, the software integrates Konnektive CRM orders and MIP based medical history.
 - This guide covers the functionality and logistics of the software from the perspective of the two user types: Administrator and CSR (Customer Service Representative)

Introduction

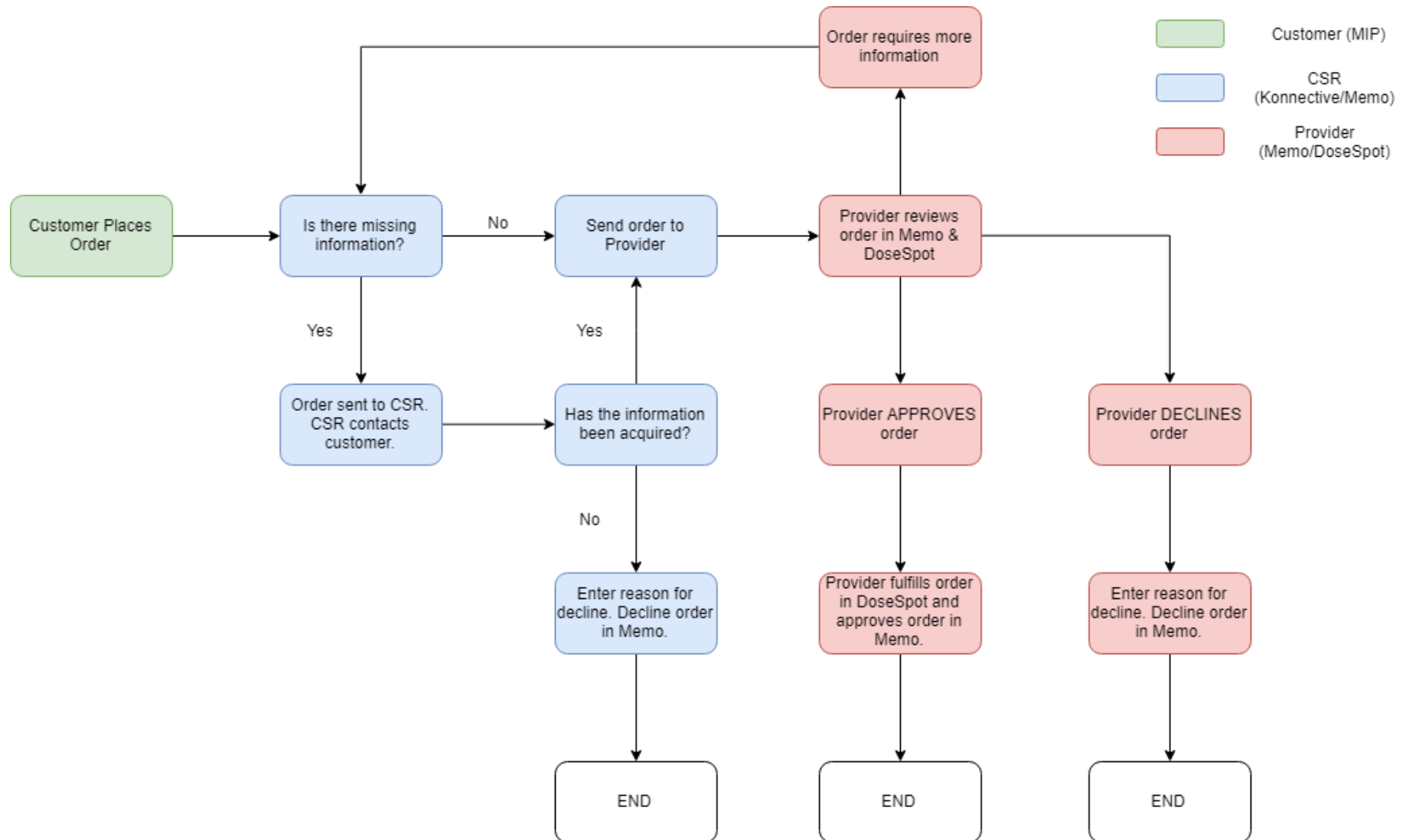
- Process Overview
 - Administrators will be able to:
 - Manage/view orders, decline orders, add notes to an order, forward an order to a provider or CSR, add/manage users, and review user activities.
 - CSRs will be able to:
 - Manage/view orders, decline orders, add notes to an order, and forward an order to a provider.

Integrated Platforms Diagram

- This diagram provides a generic outline of how each role interacts with specific platforms to complete a customer's order.

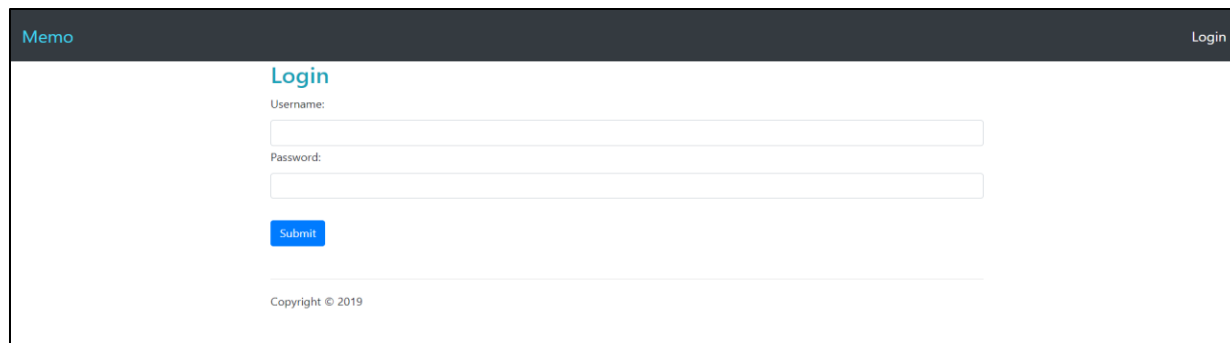


Workflow Diagram



Getting Started

- Logging in:
 - Navigate to <https://memologin.com>
 - How to log in:
 - Enter your Username, Enter your Password, Click Submit



The screenshot shows a web browser window with a dark header bar. On the left of the header is the word "Memo" in light blue, and on the right is the word "Login" in white. The main content area is white and contains a "Login" section. The "Login" section has a title "Login" in blue, followed by a "Username:" label and a text input field. Below that is a "Password:" label and another text input field. A blue "Submit" button is positioned below the password field. At the bottom of the page, there is a small copyright notice: "Copyright © 2019".

Passwords are case-sensitive

Editing Your Profile

- Editing your profile/Changing your password
 - For CSR: Click “Edit my Profile” on the menu
 - For Admin: Click “View/Edit Users” and select your name.

The image displays two screenshots of a web application interface, likely for a medical or healthcare system. Both screenshots show a top navigation bar with the following items: Memo, Order List, Medical History Entries, Edit My Profile (highlighted with a red box), My Activities, Video Chat, and Texting. A Logout button is visible in the top right corner of both screenshots.

The first screenshot shows the 'Edit My Profile' menu item highlighted. Below the navigation bar, there is a search section with filters for Order Status, Order State, Attn Party, Order Label, and Approved By, each with a dropdown menu set to 'Any'. A search text input field and a Search button are also present. Below the search section, there is a 'My Orders' section with a table header: Order, Contact Info, Medical History, Total, Attention Party/Label, and DoseSpot. The total value for the orders is 478.

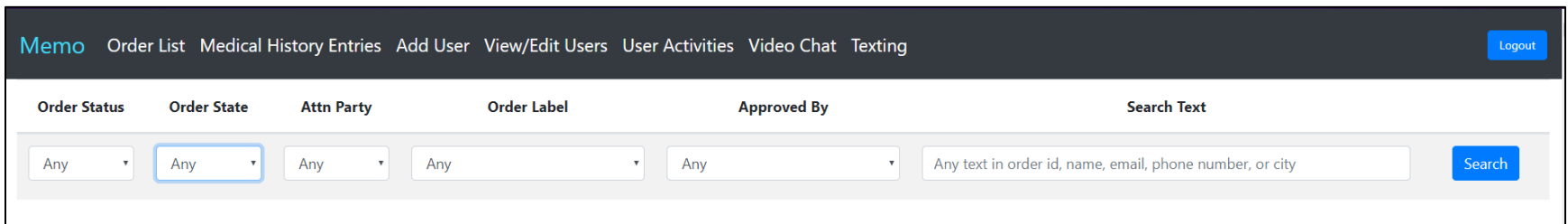
The second screenshot shows the 'View/Edit Users' menu item highlighted. The navigation bar and search section are identical to the first screenshot. The 'My Orders' section is also present, but the total value for the orders is 701.

Note: the menu bar differs between Admin and CSR users, but shared functionalities work the same as long as you locate the same link.

Homepage / Order List

- What is on the home page?
 - Signing in will bring you to the homepage which shows the order list. You can also access the order list by clicking the “Order List” link in the menu bar at the top of the page.
- How to filter order results
 - There are five search criteria boxes that can be selected. Or, use the “Search Text” box to search by keyword.
 - Selecting multiple criteria will show the orders matching any of the selected criteria being shown.

The Order List Search Bar



The screenshot shows a web application interface with a dark header bar. On the left of the header is the word "Memo" in teal, followed by a series of navigation links: "Order List", "Medical History Entries", "Add User", "View/Edit Users", "User Activities", "Video Chat", and "Texting". On the right of the header is a blue "Logout" button. Below the header is a search bar area with a light gray background. It contains six filters: "Order Status", "Order State", "Attn Party", "Order Label", and "Approved By", each with a dropdown menu showing "Any". The "Order State" dropdown is highlighted with a blue border. To the right of these filters is a text input field with the placeholder text "Any text in order id, name, email, phone number, or city". A blue "Search" button is located to the right of the text input field.

Order Status	Order State	Attn Party	Order Label	Approved By	Search Text
Any	Any	Any	Any	Any	Any text in order id, name, email, phone number, or city

NOTE: Results are ordered by date created descending. Only the first 2,000 orders will be returned if there are more than 2,000 orders matching the search criteria.

Order List

- What is shown on the Order List?
 - Medical History (GMT -5:00)
 - This shows the latest medical history form submission through MIP based on the email address and last name of the order.
 - One customer may have many medical history forms submitted in MIP. Here, it will only display the newest one.
 - No medical history form can be found if field is blank.
 - Attention Party
 - Shows which type of users this order is currently assigned to. It can be Doctor, CSR, or blank (which is the default after the order is retrieved from Konnektive).

Order Details

- How to view order details
 - Click the order number in the “Order” column

Memo Order List Medical History Entries Add User View/Edit Users User Activities Video Chat Texting Logout						
Order Status	Order State	Attn Party	Order Label	Approved By	Search Text	
Any ▾	Any ▾	Any ▾	Any ▾	Any ▾	Any text in order id, name, email, phone number, or city	
						Search
My Orders						Total: 768
Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot	
<div><div></div><div>A0E1F14794</div><div>Video</div><div>PENDING</div><div>1/18/2019, 1:41:27 PM</div></div>	<div></div>	1/17/2019, 2:28:55 PM	\$4.95 NEW_SALE	Doctor Not Labeled		

Order Details

- Clicking the order number will provide quality assurance/order information for that specific customer.
- On the order details page, there is a notes section. The notes section provides a log of actions specifying who, what, when, and why an action was performed.

Order Details

- Adding notes/Sending orders
 - At the bottom of the page, you will find a bar with several choices.
 - Use the dropdown boxes, “Reason to decline” and/or “Label to set” to select pre-generated notes explaining the action you are choosing. Setting a label simply adds a new note.
 - You may click “Save Notes” to save without committing to an action.
 - Otherwise, choose whether to send the order to the next appropriate party or decline the order.
 - For admins, you may need to enter DoseSpot to complete other order details (more on that in later slides)




Medical History Entries

- To access Medical History Entries, select the link on the menu bar at the top of the page.

The screenshot displays a web application interface. At the top, a dark grey navigation bar contains several menu items: 'Memo', 'Order List', 'Medical History Entries' (highlighted with a red rectangular box), 'Add User', 'View/Edit Users', 'User Activities', 'Video Chat', and 'Texting'. A blue 'Logout' button is positioned on the right side of this bar. Below the navigation bar is a search and filter section with labels for 'Order Status', 'Order State', 'Attn Party', 'Order Label', 'Approved By', and 'Search Text'. Each label is followed by a corresponding input field: five dropdown menus with 'Any' selected, and a text input field with the placeholder 'Any text in order id, name, email, phone number, or city'. A blue 'Search' button is located to the right of the text input field. At the bottom left of the interface, the text 'My Orders' is visible, and at the bottom right, it says 'Total: 701'.

Medical History Entries

- Accessing “Medical History Entries” will bring you to a list of customers. To view a specific customer’s medical history information, click the customer’s name.
- From there, you can access the medical history survey. (Note, only answered questions will be shown.)

Medical History Entries				Total: 2000
Name	Contact Info	Birthday	Submitted	
			6/26/2019, 11:29:57 AM	

Editing Medical History

- If you wish to edit a patient's medical history, click the link "Edit Medical History" located at the top right above Questions and Answers.

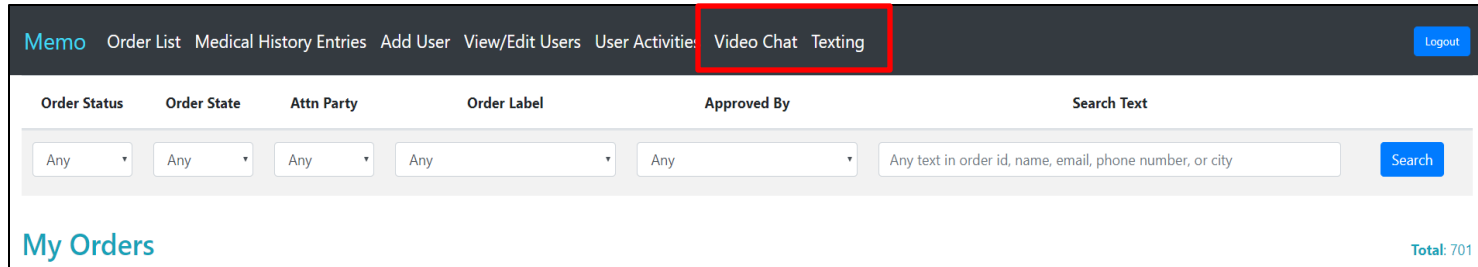
Questions & Answers

[Edit Medical History](#)

What's your legal first name?

Video Chat/Texting

- Access either the "Video Chat" or "Texting" link on the menu bar at the top of the page to do the respective action.
- These functionalities can be used to connect with customers if necessary.



The screenshot displays a web application interface. At the top, a dark grey menu bar contains several links: "Memo", "Order List", "Medical History Entries", "Add User", "View/Edit Users", "User Activities", "Video Chat", and "Texting". The "Video Chat" and "Texting" links are highlighted with a red rectangular box. To the right of the menu bar is a blue "Logout" button. Below the menu bar is a search and filter section with the following labels: "Order Status", "Order State", "Attn Party", "Order Label", "Approved By", and "Search Text". Each label is followed by a dropdown menu or a text input field. The dropdown menus for "Order Status", "Order State", "Attn Party", and "Approved By" all show "Any" as the selected option. The "Order Label" dropdown shows "Any". The "Search Text" field contains the placeholder text "Any text in order id, name, email, phone number, or city". A blue "Search" button is located to the right of the search text field. At the bottom left of the interface is a link labeled "My Orders". At the bottom right is a label "Total: 701".

Role Specific Instructions

- The following few slides contain CSR/Admin specific instructions. Follow the labels in the slide title to study the proper slides for your role.
 - Table of Contents
 - Slide 19: My Activities (CSR only)
 - Slide 20 – 22: Managing Users (Admin only)
 - Slides 23 – 27: Navigating DoseSpot (Admin/Provider Proxies only)

My Activities (CSR only)

- Access the link “My Activities” on the menu bar at the top of the page.
- From there, you can see all actions taken on your account.

The screenshot displays a web application interface with a dark grey top navigation bar. The bar contains several menu items: 'Memo', 'Order List', 'Medical History Entries', 'Edit My Profile', 'My Activities' (highlighted with a red box), 'Video Chat', and 'Texting'. A 'Logout' button is located on the far right of this bar. Below the navigation bar is a search and filter section with labels for 'Order Status', 'Order State', 'Attn Party', 'Order Label', and 'Approved By'. Each label is followed by a dropdown menu currently set to 'Any'. To the right of these is a 'Search Text' input field with placeholder text 'Any text in order id, name, email, phone number, or city' and a blue 'Search' button. Below this section, the heading 'My Orders' is visible on the left, and 'Total: 478' is on the right. At the bottom, a table header is partially visible with columns: 'Order', 'Contact Info', 'Medical History', 'Total', 'Attention Party/Label', and 'DoseSpot'.

Managing Users (Admin only)

- How to add a user
 - Access the “Add User” link on the menu bar at the top of the page.
 - From there, enter the new user’s information and click submit.

Memo Order List Medical History Entries **Add User** View/Edit Users User Activities Video Chat Texting Logout

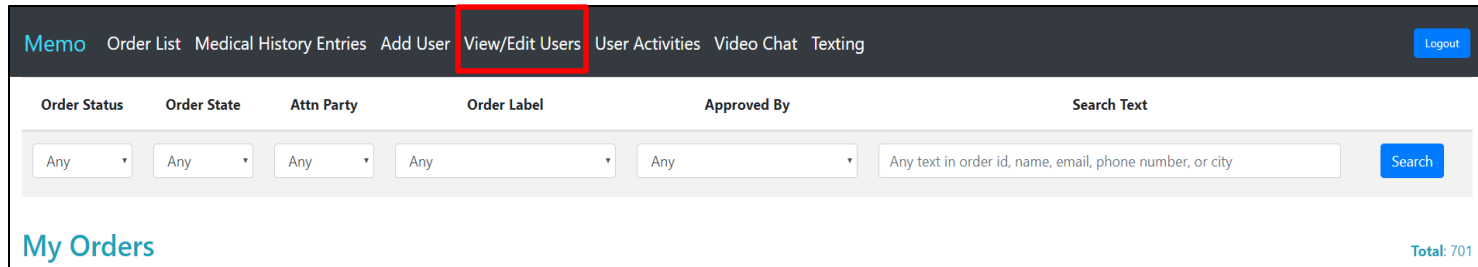
Order Status Order State Attn Party Order Label Approved By Search Text

Any Any Any Any Any Any text in order id, name, email, phone number, or city Search

My Orders Total: 701

Managing Users (Admin only)

- How to view/edit users
 - Access the “View/Edit Users” link on the menu bar at the top of the page.
 - From there, click on the name of the sought user.
 - Change any necessary information and click submit.



The screenshot shows the top navigation bar of the application. The navigation bar is dark gray with white text. The links are: Memo, Order List, Medical History Entries, Add User, View/Edit Users (highlighted with a red rectangle), User Activities, Video Chat, and Texting. A blue Logout button is on the right. Below the navigation bar is a search section with a light gray background. It contains several dropdown menus for filtering: Order Status, Order State, Attn Party, Order Label, and Approved By. Each dropdown has 'Any' selected. To the right of these is a search text input field with the placeholder text 'Any text in order id, name, email, phone number, or city'. A blue Search button is to the right of the input field. At the bottom left of the search section is the text 'My Orders' and at the bottom right is 'Total: 701'.

Managing Users (Admin only)

- How to view user activity
 - Access the link “User Activities” on the menu bar at the top of the page.
 - This page will display a log of all users and their activity. (Note, only 2,000 activities will be displayed).

Memo Order List Medical History Entries Add User View/Edit Users **User Activities** Video Chat Texting Logout

Order Status	Order State	Attn Party	Order Label	Approved By	Search Text
Any ▾	Any ▾	Any ▾	Any ▾	Any ▾	Any text in order id, name, email, phone number, or city

Search

My Orders Total: 701

Navigating DoseSpot (Admin/Provider Proxy)

- Access DoseSpot either at the top of the individual order detail page, the bottom via the "Add/Update DoseSpot" button, or via the "DoseSpot Link" on the Order List.

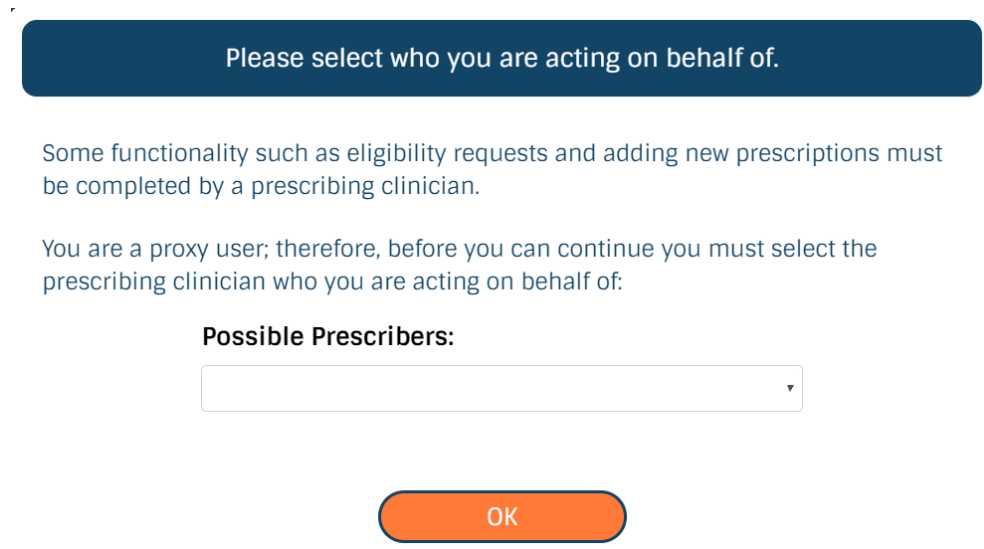
The screenshot displays the DoseSpot Admin/Provider Proxy interface. At the top, there are navigation links: "My Next Order", "Back to My Orders", "Refresh from Konnektive", and a yellow button labeled "4 DoseSpot Notifications" which is highlighted with a red box. Below this is a "General Notes" section with a text area. Underneath the notes is a row of action buttons: "Approve Order", "Re" (with a dropdown arrow), "Decline Order", "La" (with a dropdown arrow), "Set Label", "Send to Doctor", "Send to CSR", "Save Notes", and "Add/Update DoseSpot" (highlighted with a red box). To the right of these buttons is a link "My Next Order". Below the action buttons is a link "Back to My Orders".

Below the action buttons is a section titled "My Orders" with a "Total: 173" indicator. This section contains a table with the following columns: "Order", "Contact Info", "Medical History", "Total", "Attention Party/Label", and "DoseSpot".

Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot
andrew noponen B1FA5B0C44 Video PENDING 4/3/2019, 5:09:42 PM	anoponen0@gmail.com Phone: 4173121152 100 n dikie land rd rogers, AR 72756 US	4/3/2019, 5:07:59 PM	\$16.18 NEW_SALE	Not Assigned Need More Detail - Medication Dosage Or Spelling	DoseSpot Link (highlighted with a red box)

Navigating DoseSpot (Admin/Provider Proxy)

- Before you get access to DoseSpot, you will be asked to choose the provider you are acting on behalf of. Select the correct name and click ok.



Please select who you are acting on behalf of.

Some functionality such as eligibility requests and adding new prescriptions must be completed by a prescribing clinician.

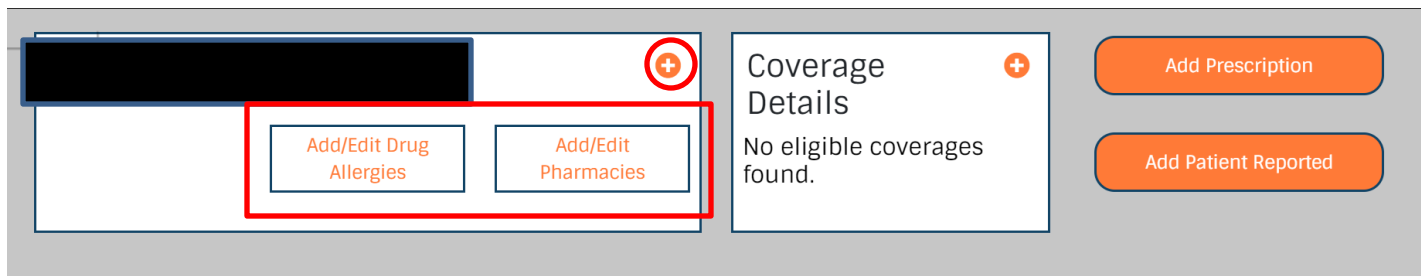
You are a proxy user; therefore, before you can continue you must select the prescribing clinician who you are acting on behalf of:

Possible Prescribers:

OK

Navigating DoseSpot (Admin/Provider Proxy)

- Once in DoseSpot, you will be presented with a patient's prescription page OR a list of pending patient orders. (Differs based on how you accessed DoseSpot)
- From here, you may view patient info.
- To view/edit a patient's info, click the plus sign or "Add/Edit" boxes in the top left box.



Navigating DoseSpot (Admin Only)

- View coverage details in the "Coverage Details" box.
- Add prescriptions/new patient reported medication via the corresponding box.

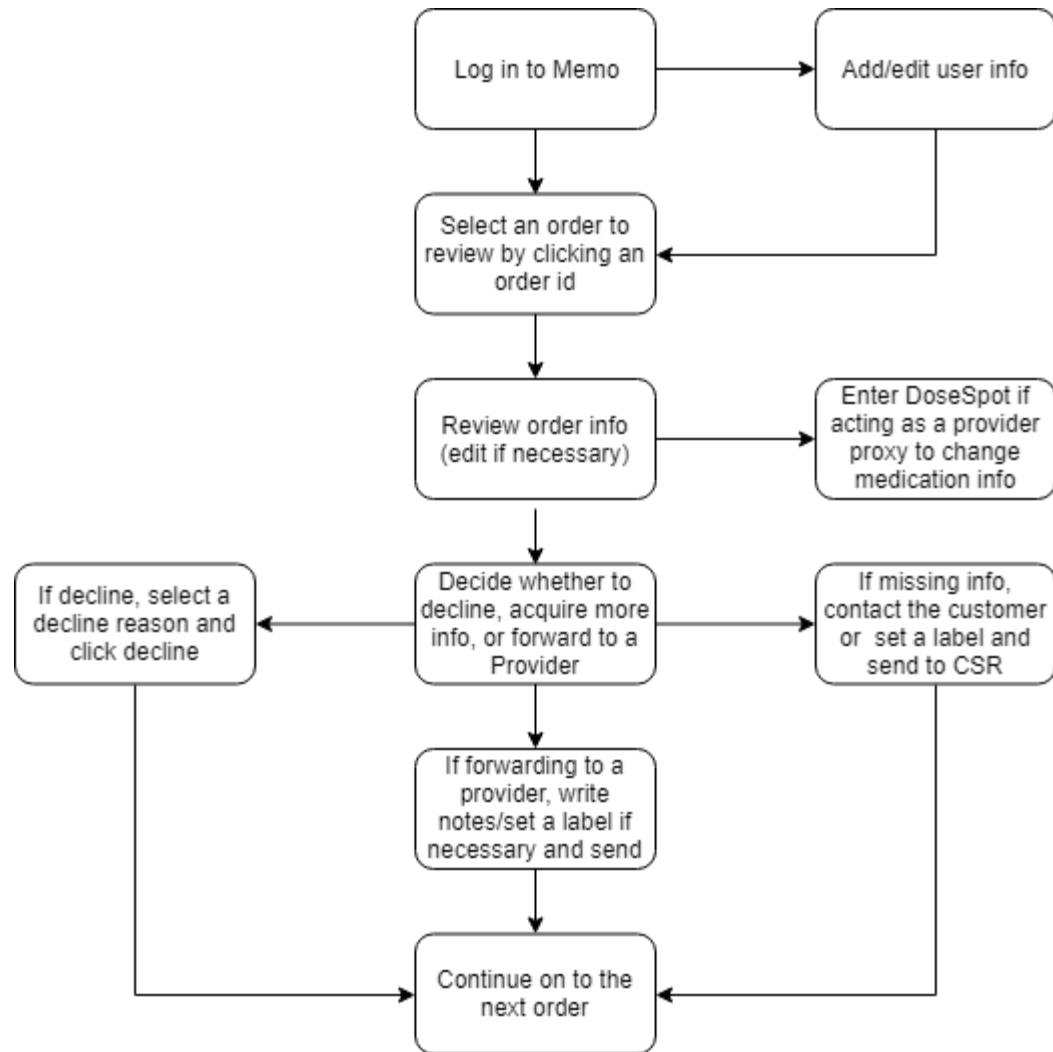
The screenshot displays the DoseSpot Admin interface. On the left, there is a search bar (redacted with a black box) and two buttons: "Add/Edit Drug Allergies" and "Add/Edit Pharmacies". In the center, the "Coverage Details" box is highlighted with a red border; it contains the text "Coverage Details" and "No eligible coverages found." To the right of this box are two orange buttons: "Add Prescription" and "Add Patient Reported".

Navigating DoseSpot (Admin/Provider Proxy)

- View active/inactive prescriptions in the box at the bottom of the page. Click the appropriate tab at the top of the box.
- You may also view patient medication history.
- Under “Active Medications”, you will see a list of current prescriptions. A check mark under status means the prescription has been sent.

Active Medications Inactive Medications Medication History					
Simple Detailed					
Show 10 entries			Search:		
Medication	Dispense	Date	Dispensings	Status	
Tadalafil 6mg/ Arginine 250mg* Sig: Take 1 capsule by mouth daily, without regard to timing of sexual activity, with or without food. View Pharmacy View Prescriber	30 Capsules	Jul 8, 2019	12	✓	Actions

Admin Workflow Summary



CSR Workflow Summary

