Memo User Guide: Admin/CSR

Introduction

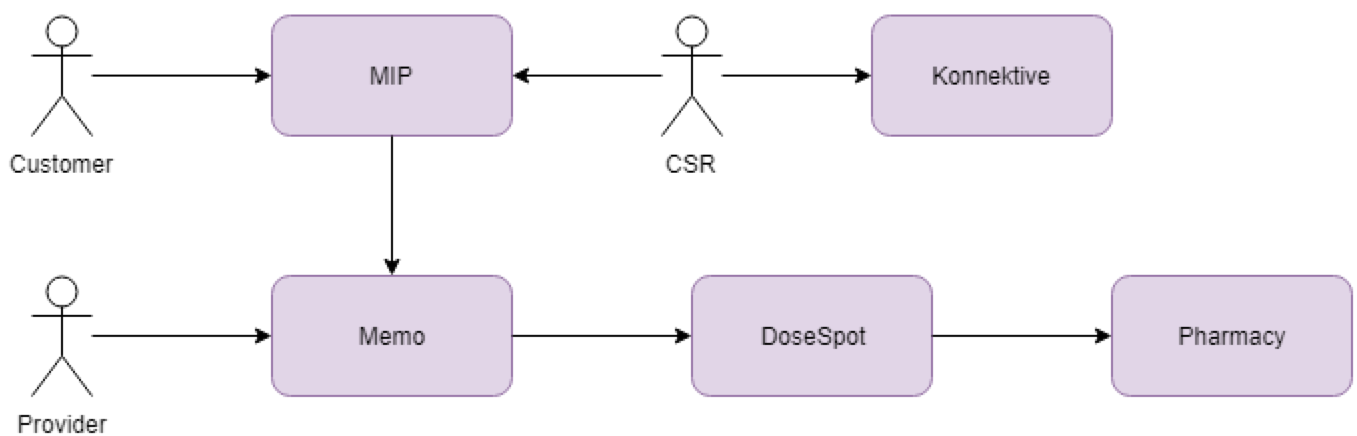
- Scope and Purpose
  - Memo connects ordering, medical history, customer service, and order approval into one convenient location.
  - In this release, the software integrates Konnektive CRM orders and MIP based medical history.
  - This guide covers the functionality and logistics of the software from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

Introduction

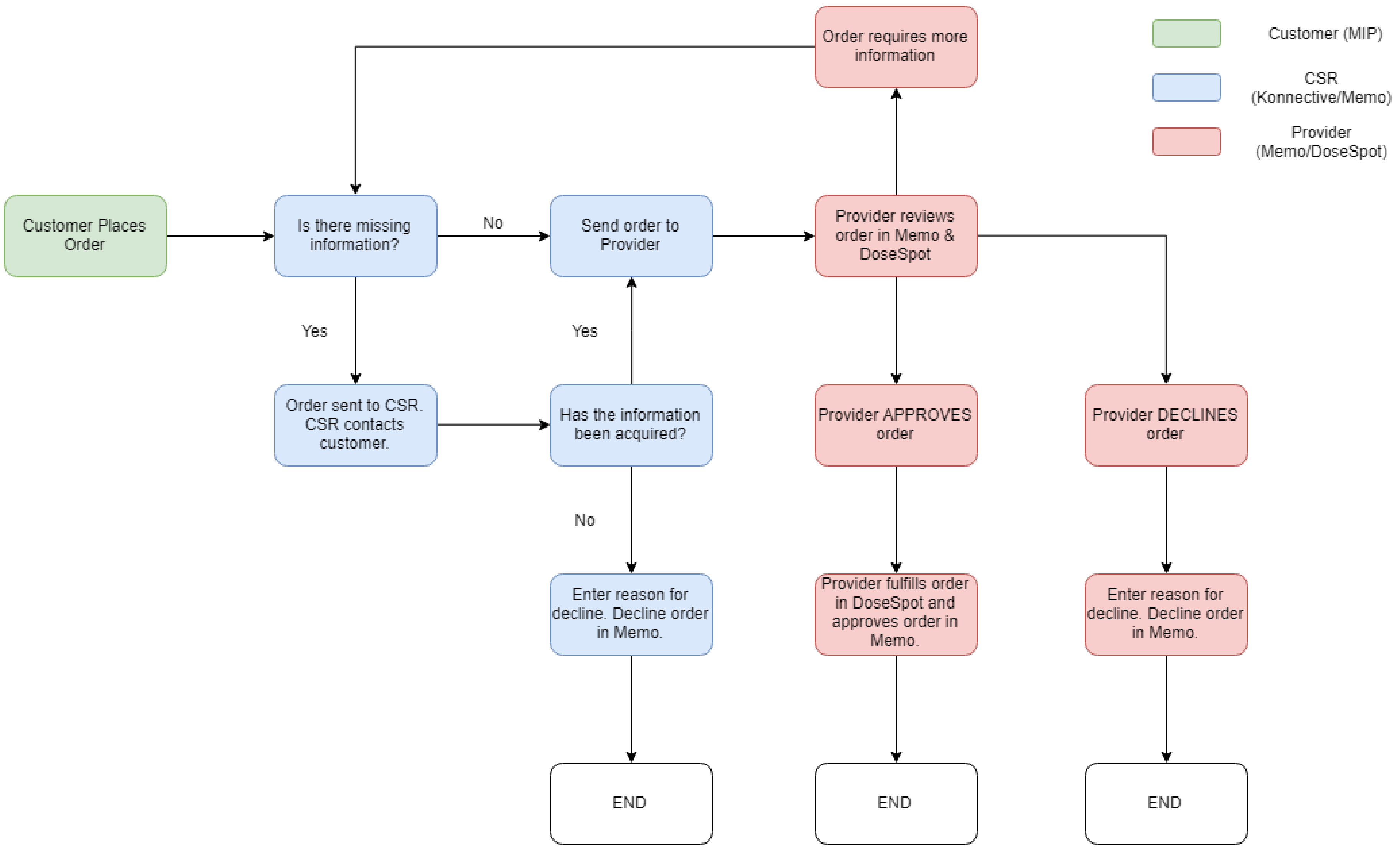
- Process Overview
  - Administrators will be able to:
    - Manage/view orders, decline orders, add notes to an order, forward an order to a provider or CSR, add/manage users, and review user activities.
  - CSRs will be able to:
    - Manage/view orders, decline orders, add notes to an order, and forward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

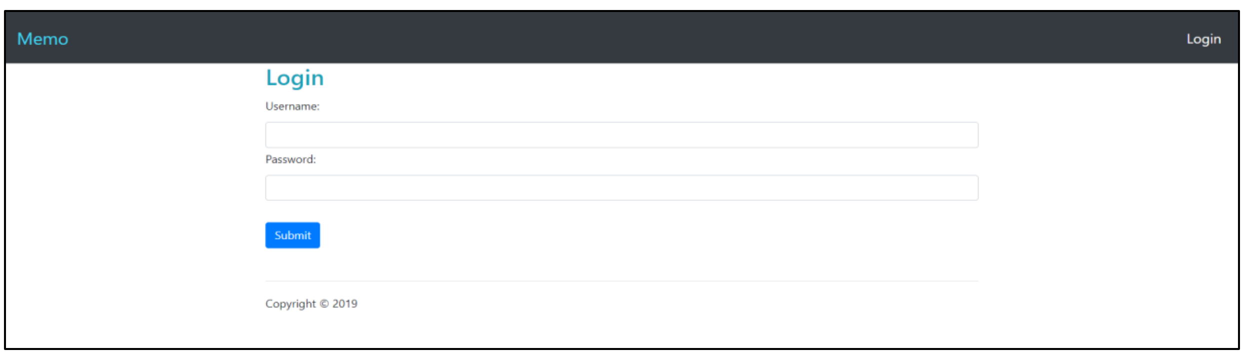


Workflow Diagram



Getting Started

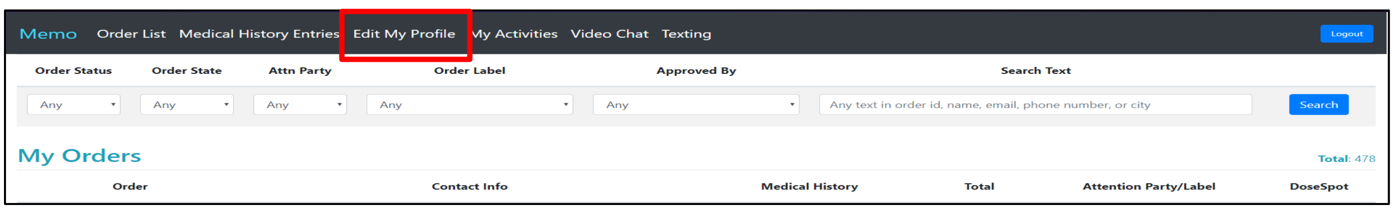
- Logging in:
  - Navigate to https://memologin.com
  - How to log in:
    - Enter your Username, Enter your Password, Click Submit

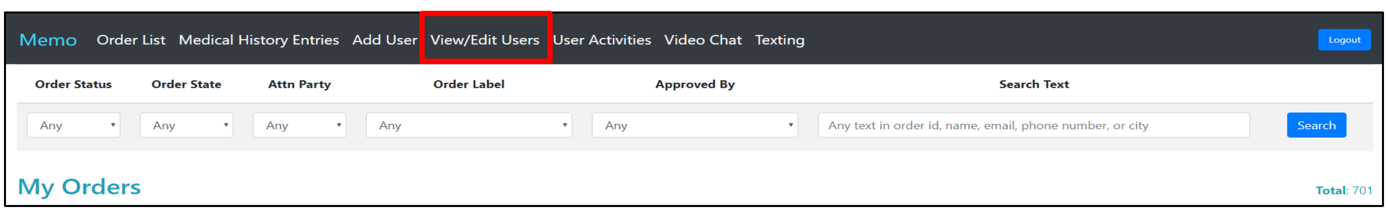


Passwords are case-sensitive

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.



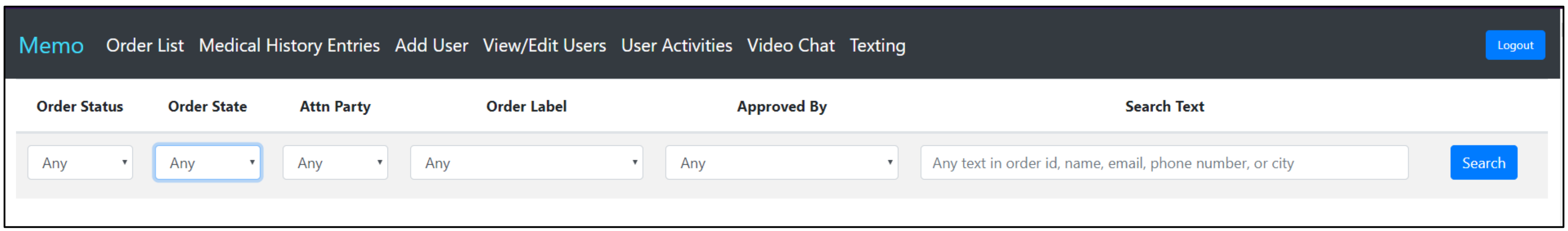


Note: the menu bar differs between Admin and CSR users, but shared functionalities work the same as long as you locate the same link.

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



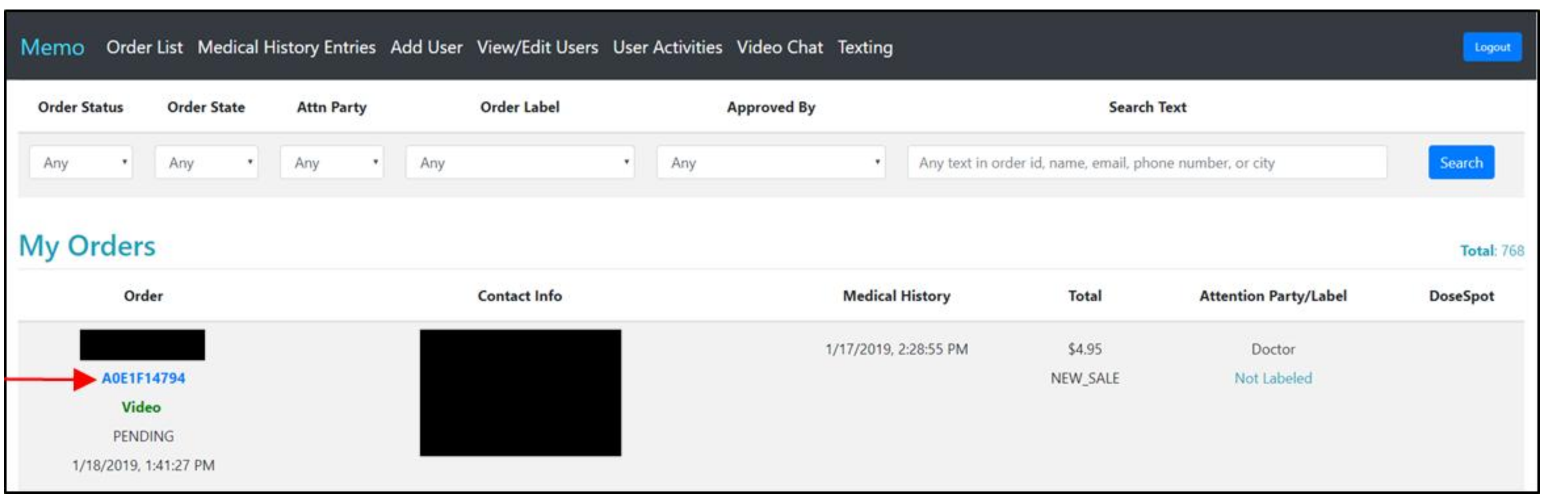
NOTE: Results are ordered by date created descending. Only the first 2,000 orders will be returned if there are more than 2,000 orders matching the search criteria.

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



Order Details

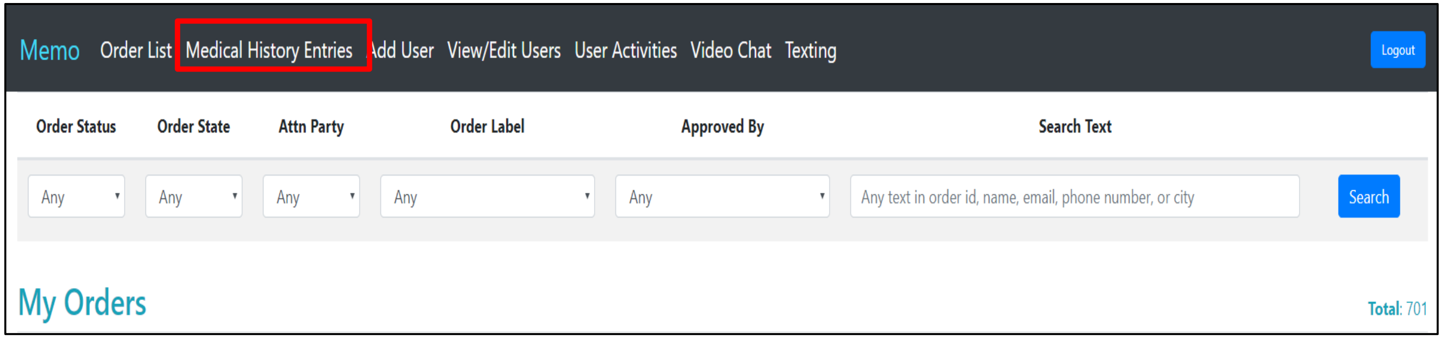
- Clicking the order number will provide quality assurance/order information for that specific customer.
- On the order details page, there is a notes section. The notes section provides a log of actions specifying who, what, when, and why an action was performed.

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.



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.)

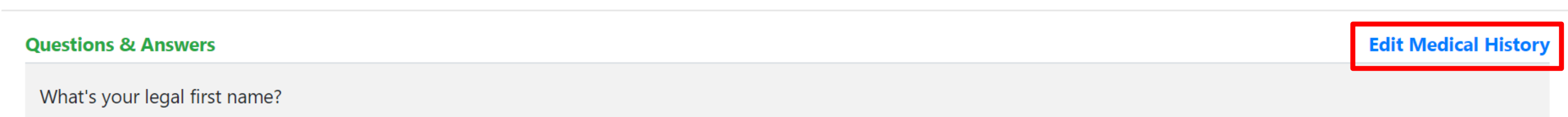
Medical History Entries

Total: 2000

Name	Contact Info	Birthday	Submitted
[redacted]	[redacted]	[redacted]	6/26/2019, 11:29:57 AM

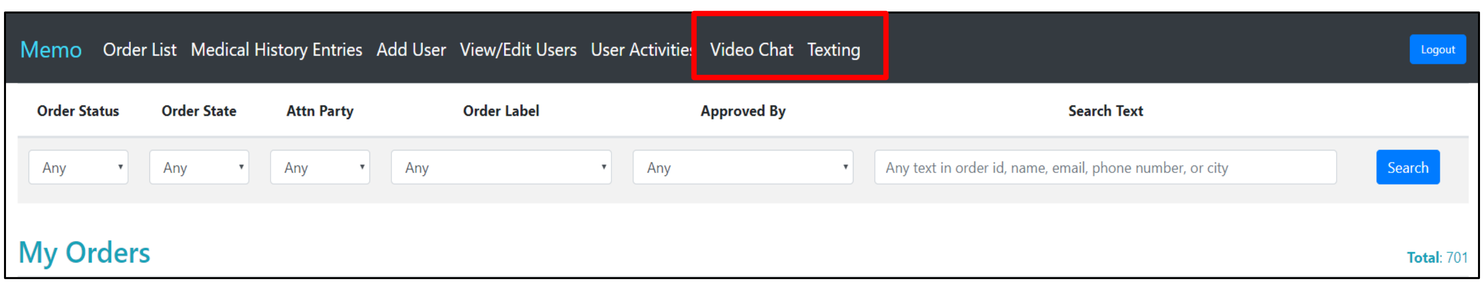
Editing Medical History

- 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.



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.

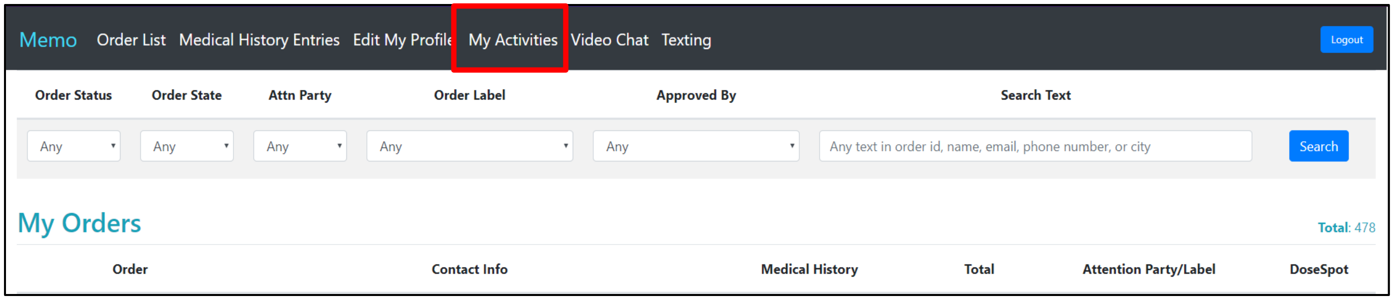


Role Specific Instructions

- 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)

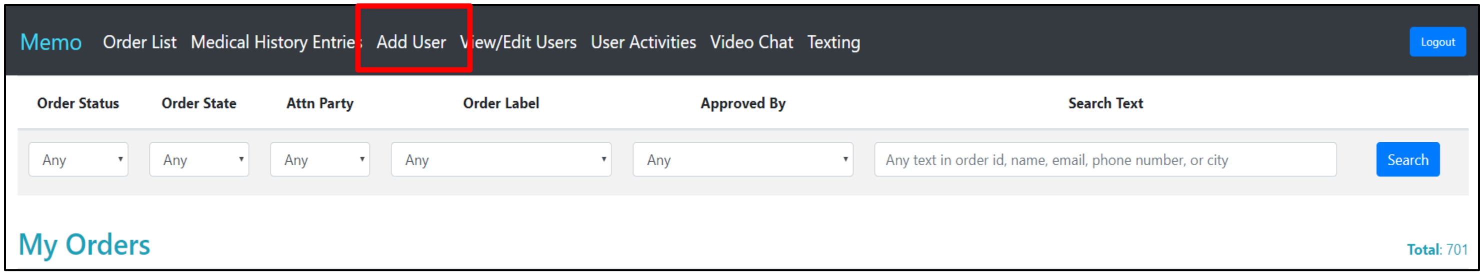
My Activities (CSR only)

- 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.



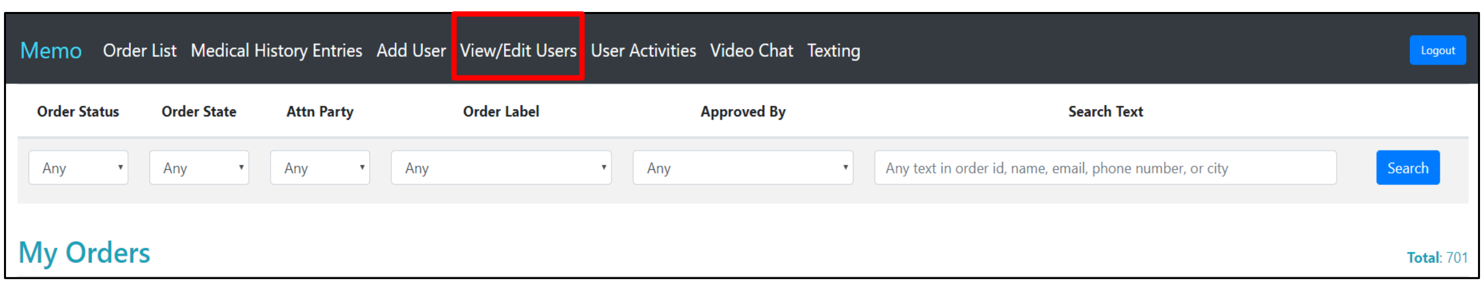
Managing Users (Admin only)

- 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.



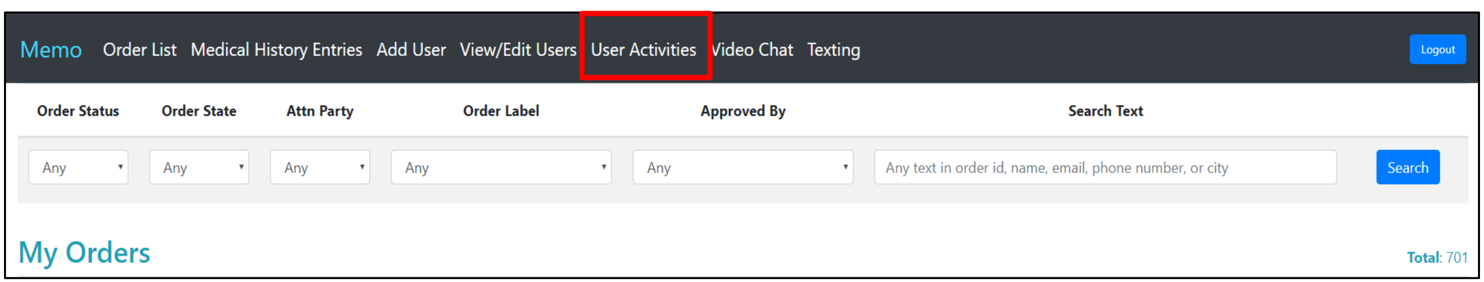
Managing Users (Admin only)

- 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.



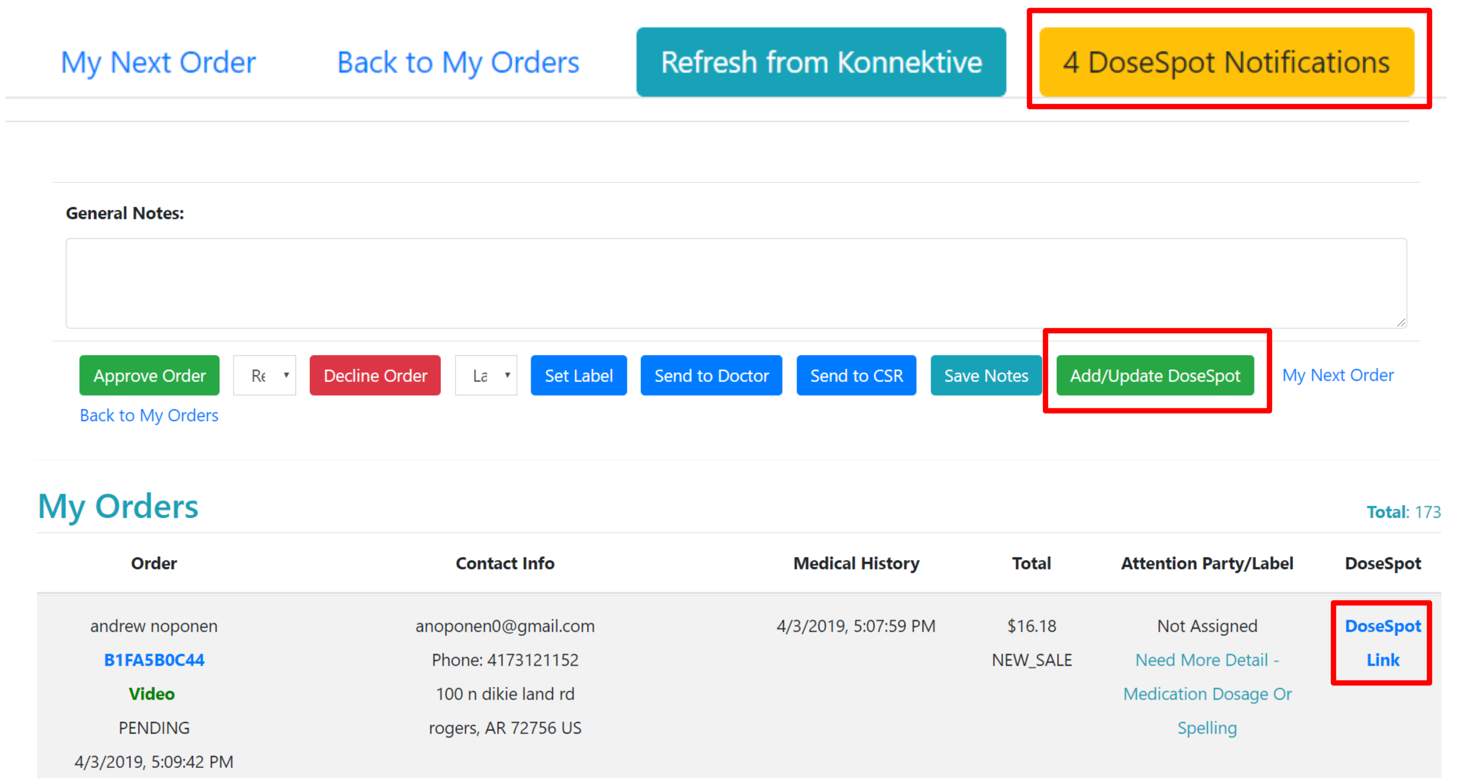
Managing Users (Admin only)

- 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).



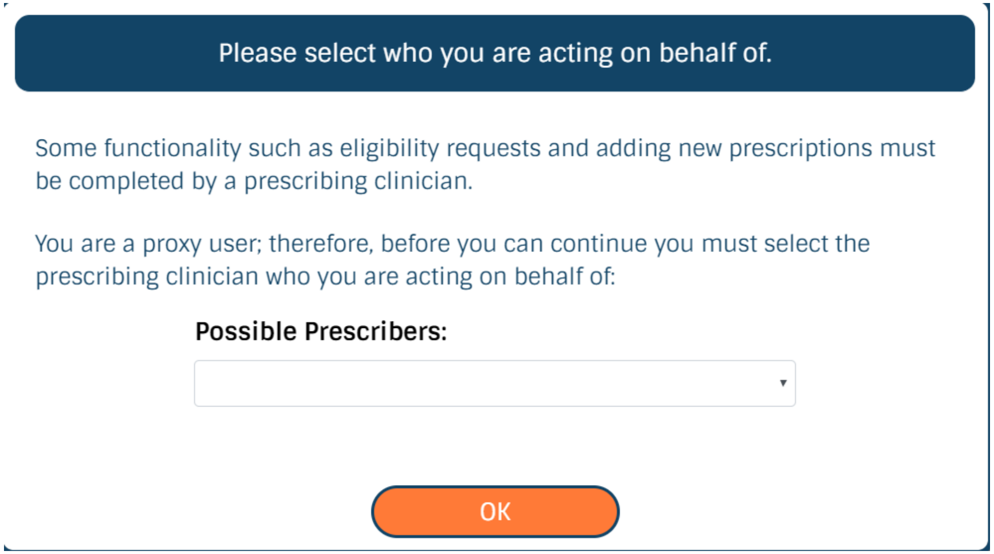
Navigating DoseSpot (Admin/Provider Proxy)

- 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.



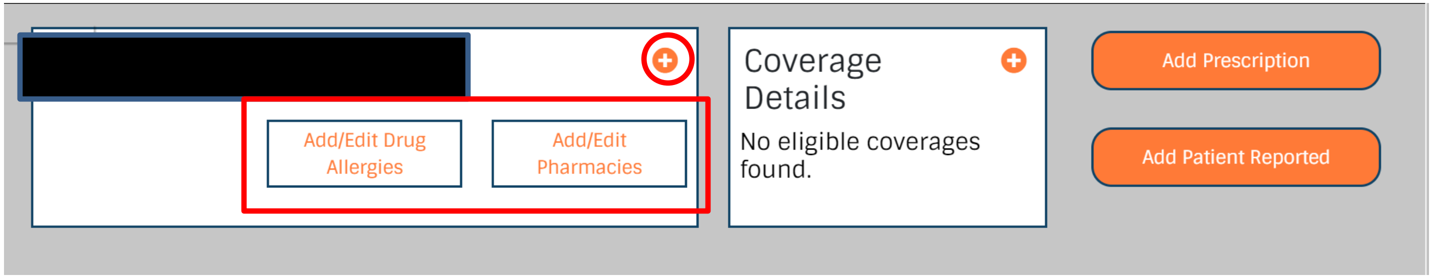
Navigating DoseSpot (Admin/Provider Proxy)

- 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.



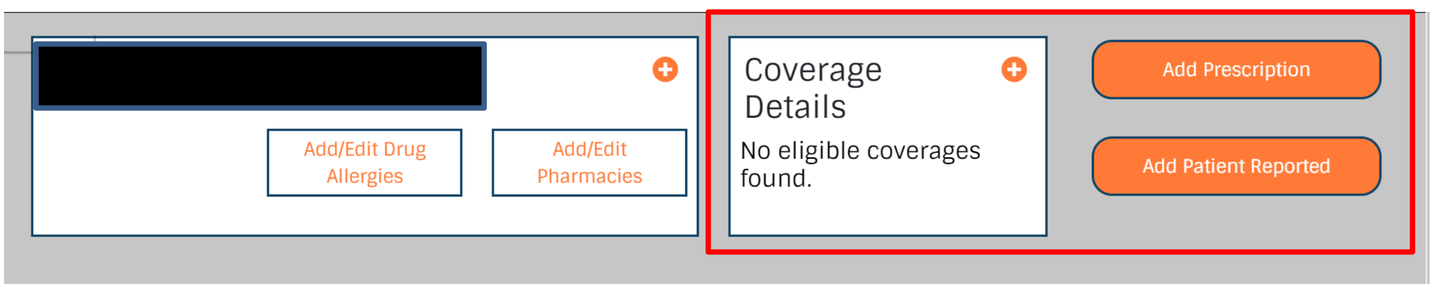
Navigating DoseSpot (Admin/Provider Proxy)

- 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.



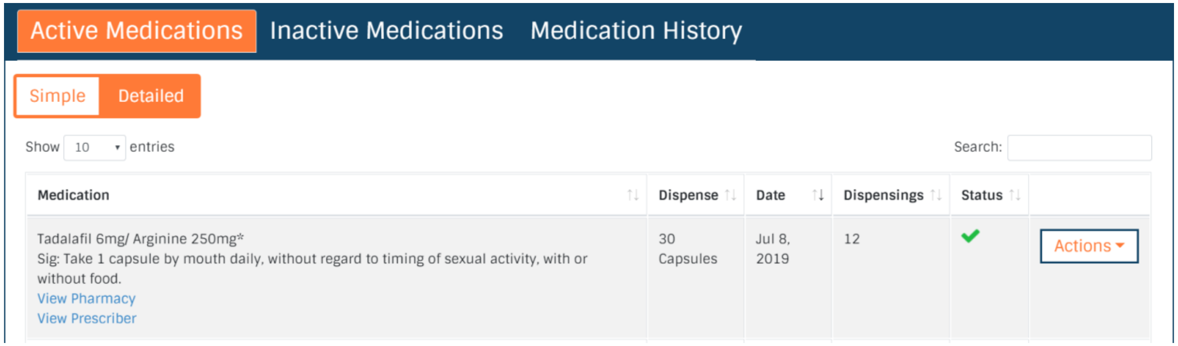
Navigating DoseSpot (Admin Only)

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

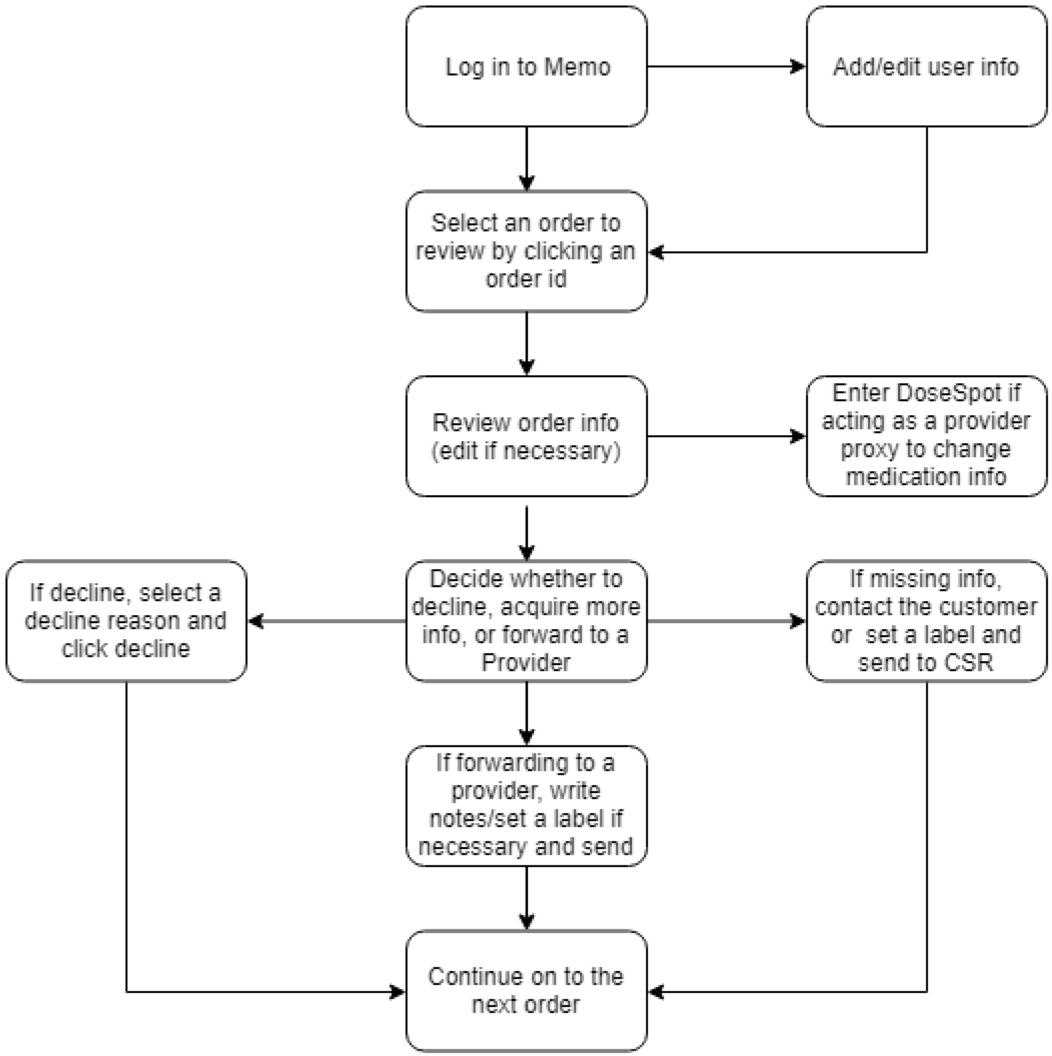


Navigating DoseSpot (Admin/Provider Proxy)

- 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.



Admin Workflow Summary



CSR Workflow Summary