



# Memo User Guide: Providers

# Introduction

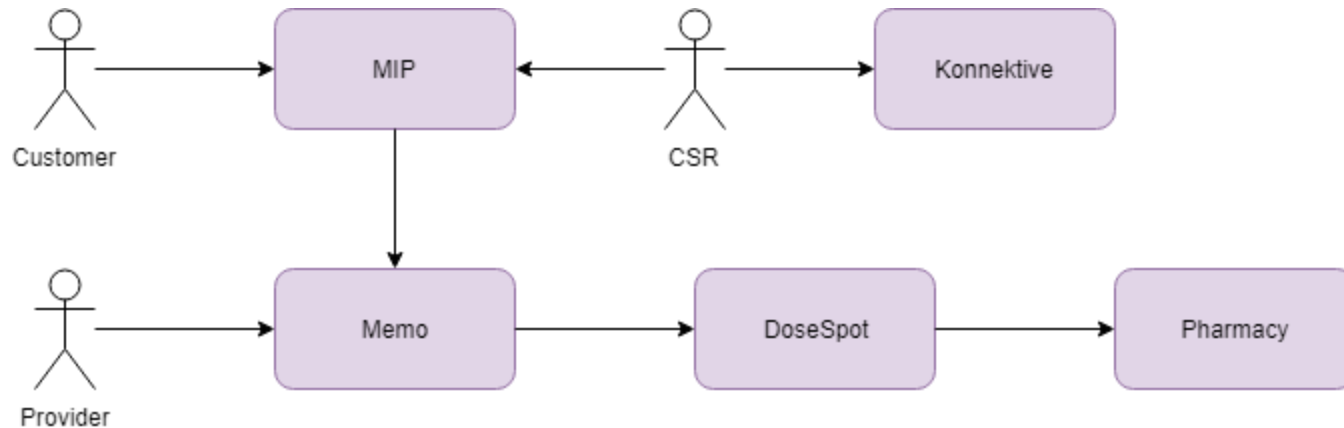
- Scope and Purpose
  - Memo connects ordering, medical history, customer service, and order approval into one convenient location.
  - In this release, the software integrates Konnektive CRM orders and MIP based medical history.
  - This guide covers the functionality and logistics of the software from the perspective of the user type: Providers

# Introduction

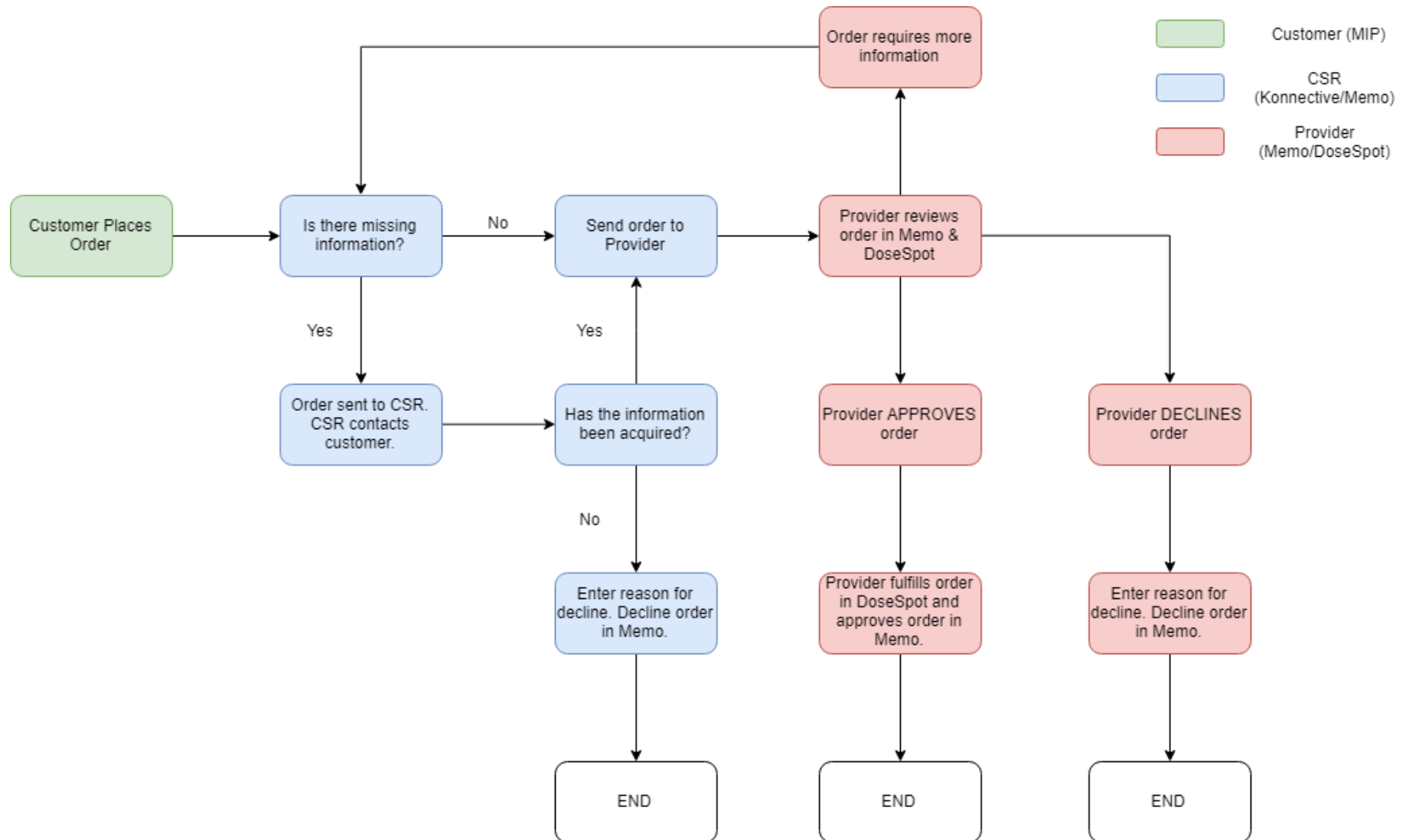
- Process Overview
  - Providers will be able to:
    - Manage/view orders, approve/decline orders, add notes to an order, and forward an order to a Customer Service Representative (CSR).

# Integrated Platforms Diagram

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

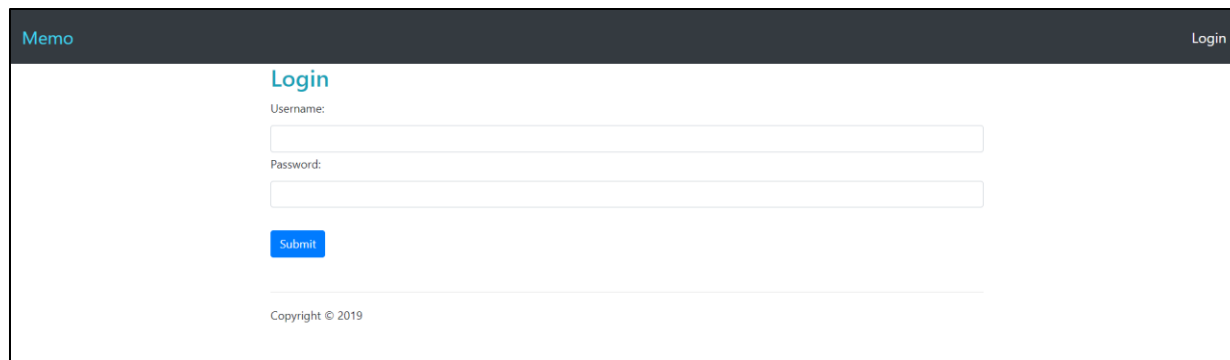


# Workflow Diagram



# Getting Started

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

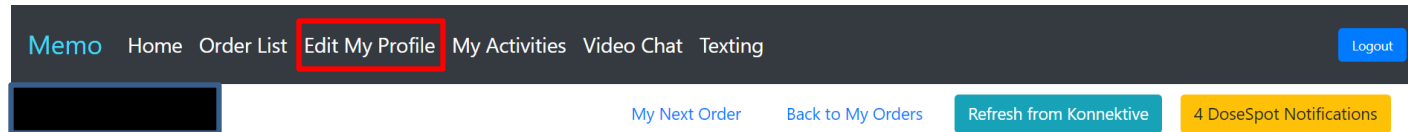


The screenshot shows a web page titled "Memo" in the top left corner and "Login" in the top right corner. The main content area is titled "Login" in blue. Below the title, there are two input fields: "Username:" and "Password:". Below the "Password:" field is a blue "Submit" button. At the bottom of the page, there is a copyright notice: "Copyright © 2019".

\*\*\*Passwords are case-sensitive\*\*\*

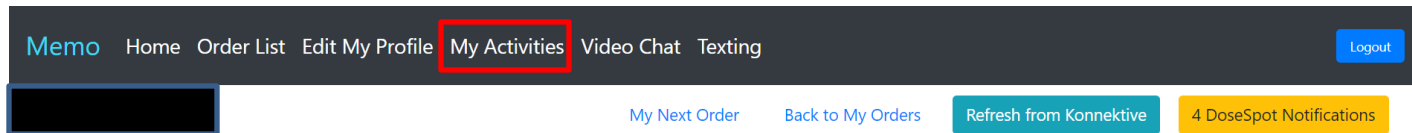
# Editing Your Profile

- Click “Edit my Profile” on the menu and edit any information necessary.



# My Activities

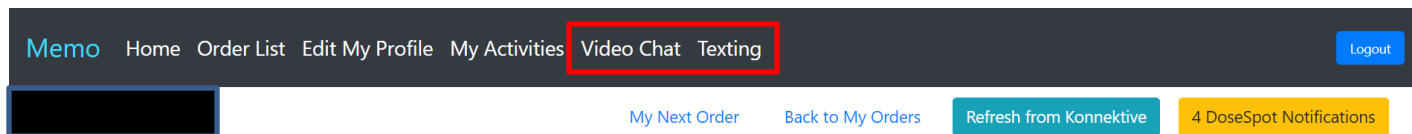
- Clicking the “My Activities” link will bring you to a page from which you can view the actions you have taken on patient orders.





# Video Chat/Texting

- Clicking either of these tabs will allow you to engage in video chatting/texting.
- Use these functionalities to contact customers if necessary for prescription fulfillment.

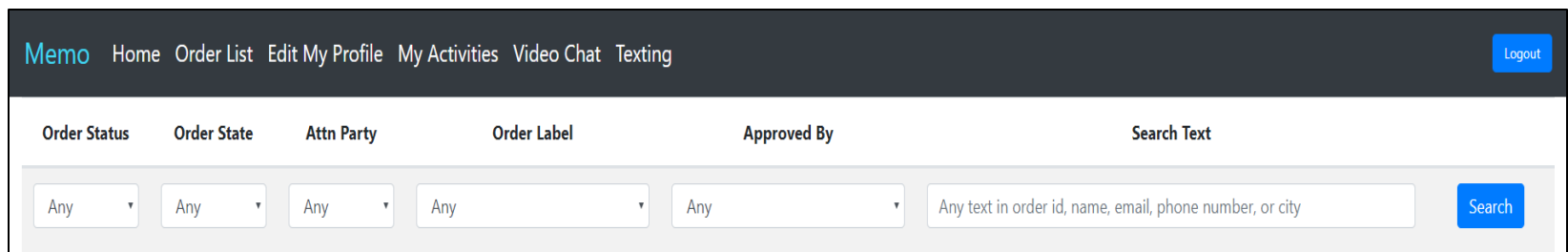


# Homepage/Orders

- Accessing Orders
  - The homepage shows a patient order ready for review. The order is shown in the individual order view (more on that in later slides).
  - For your convenience, you may work directly from the home page without accessing any other links.
  - If you wish to access the overall order list, click “Order List” on the menu bar at the top of the page.

# Order List

- In "Order List", there are 5 filter criteria that can be selected. Or, use the "Search Text" box to search using a keyword(s).
- Click the drop down box(es) of the orders that you are looking for. Selecting multiple criteria will show the orders matching any of the selected criteria.



The screenshot displays the 'Order List' interface. At the top, a dark navigation bar contains the 'Memo' logo and links to 'Home', 'Order List', 'Edit My Profile', 'My Activities', 'Video Chat', and 'Texting'. A 'Logout' button is located in the top right corner. Below the navigation bar, the main content area features a table of filter criteria. The criteria are: 'Order Status', 'Order State', 'Attn Party', 'Order Label', and 'Approved By'. Each criterion has a corresponding dropdown menu, all of which are currently set to 'Any'. To the right of these dropdowns 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 positioned to the right of the search 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

# Order List

- Note: Clicking the search button with selected criteria will show orders that you are not authorized to approve or decline.
- All orders shown on the homepage and initially on the order list page (before using "search") will be orders you are authorized to approve or decline.
- Authorized orders follow these guidelines:
  1. The order must be in the state the doctor can practice
  2. The order has a pending status
  3. The order has not been sent to CSR to collect more information

# Order List

- The "Pending" status shows orders that require a doctor's review.


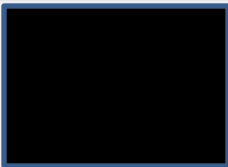
Order	Contact Info	Address	Campaign	Agent	price	Item Summary				
<div>*D0F3780FF*</div> <div>Video</div> <div>PENDING</div> <div>4/3/2019, 12:03:18 PM</div>	<div></div>	<div></div>	2019 First Order Half Off	63160	Price: \$32.35 NEW_SALE	<table><tr><th>Product Name/Description</th><th>Qty/Price</th></tr><tr><td>J - 6 Tadalafil Capsule. 6 capsules 21mg Tadalafil per month with 11 refills.</td><td>1 \$32.35</td></tr></table>	Product Name/Description	Qty/Price	J - 6 Tadalafil Capsule. 6 capsules 21mg Tadalafil per month with 11 refills.	1 \$32.35
Product Name/Description	Qty/Price									
J - 6 Tadalafil Capsule. 6 capsules 21mg Tadalafil per month with 11 refills.	1 \$32.35									

# Order List

- Medical History Submission Time (GMT -5:00)
  - Describes the latest medical history form submitted in MIP based on the customer's email address and last name.
  - The field is blank if no medical history form can be found.

## My Orders

Total: 253


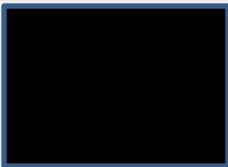
Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot
 D0F3780FFF Video PENDING 4/3/2019, 12:03:18 PM		4/3/2019, 12:05:49 PM	\$32.35 NEW_SALE	Not Assigned Not Labeled	

# Order List

- Attention Party
  - Describes 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).

## My Orders

Total: 253

Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot
 D0F3780FFF Video PENDING 4/3/2019, 12:03:18 PM		4/3/2019, 12:05:49 PM	\$32.35 NEW_SALE	Not Assigned Not Labeled	

# Individual Order Details

- Access a customer's individual order summary page by clicking on their order ID.
- From there, you may view the customer's medical history.

[Memo](#) [Home](#) [Order List](#) [Edit My Profile](#) [My 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: 275

Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot
<div><div></div><div>2FD98F9FDC</div><div>Video</div><div>PENDING</div><div>2/13/2019, 6:41:01 PM</div></div>	<div></div>	2/13/2019, 5:33:25 PM	\$20.00 NEW_SALE	Not Assigned Not Labeled	



# Individual Order Details

- 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?

# Individual Order Details

- Notes:
  - These are the notes entered when the order is "Sent to Doctor" or "Sent to CSR". They may or may not be the latest notes entered on this order.
- What are Soap Notes?
  - Soap notes provide a log of actions and notes associated with the patient such as the current prescription, assessment, and medication plan.
  - If needed, please fill in any missing information.

# Picking a Plan

- Based on the chosen plan, a default pharmacy is chosen to fulfill the order.
- NOTE: When picking a plan, please be careful to select the exact prescription desired. For example, if you wish to prescribe Tadalafil, specify whether you want Compounded or Generic Tadalafil.

# Processing an Order

1. Review the order information and medical history survey in Memo.
2. Access DoseSpot to review medication history (explained in later slides).
3. Back in Memo, decide whether to approve, decline, or forward the order to a CSR (if information needs to be updated).
  - If you choose to approve, update the soap notes and pick a plan.
  - If you decline, select a decline reason and click decline.
  - If more info is needed, send the order to CSR.

# Processing an Order

5. If you chose to approve the order, add any necessary labels/notes and then click "Approve Order"
6. The next step is to fulfill the prescription through DoseSpot. Click the "Add/Update DoseSpot" button.
7. Navigate DoseSpot to fulfill the prescription

General Notes:

Approve Order

Re ▾

Decline Order

La ▾

Set Label

Send to Doctor

Send to CSR

Save Notes

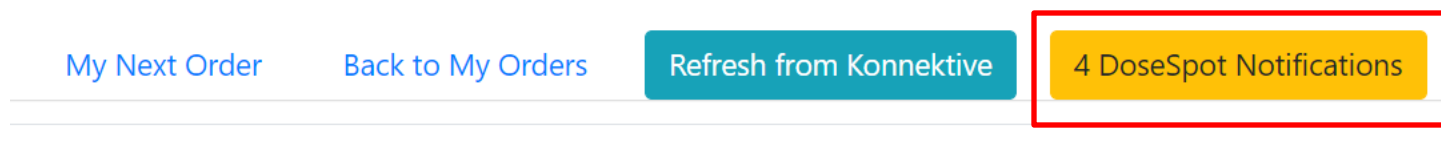
Add/Update DoseSpot

[My Next Order](#)

[Back to My Orders](#)


# Navigating DoseSpot

- You may also access DoseSpot via a button at the top of the individual order page. This will bring you to a list of all orders needing your attention.



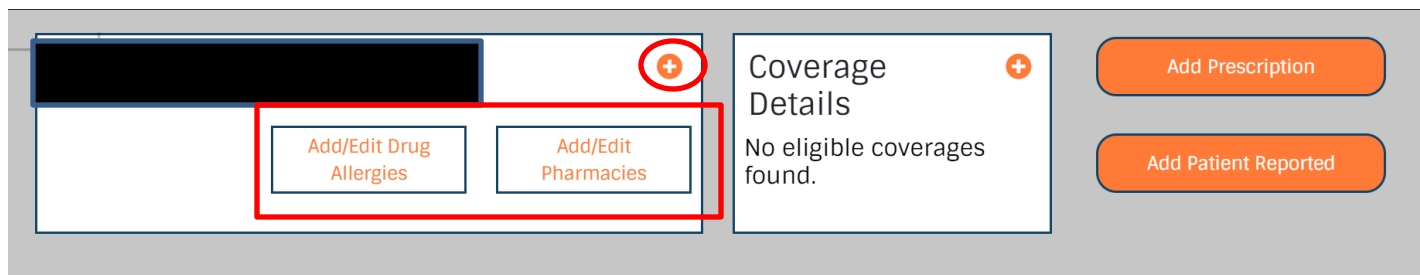
- Or, access DoseSpot via the Order List by clicking the “DoseSpot Link” in an order box.

My Orders Total: 173

Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot
		4/3/2019, 5:07:59 PM	\$16.18 NEW_SALE	Not Assigned Need More Detail - Medication Dosage Or Spelling	<a href="#">DoseSpot Link</a>

# Navigating DoseSpot

- Once in DoseSpot, you will be presented with the patient's prescription page.
- From here, you may view patient info, and approve prescriptions.
- To view/edit a patient's info, click the plus sign or "Add/Edit" boxes in the top left box.



# Navigating DoseSpot

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

The screenshot displays the DoseSpot user interface. On the left, there is a search bar (represented by a black rectangle) 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

- View/send any pending medications by checking the box on the left and then click “Approve and Send”.
- If you wish to print, click “Approve and Print”
- You can change the pharmacy via the “Change Pharmacy” button

### Pending Medications

☐ Select All

Search:

	Medication <small>↑↓</small>	Dispense <small>↑↓</small>	Date <small>↑↓</small>	Refills <small>↑↓</small>	Prescriber [Agent] <small>↑↓</small>	Pharmacy <small>↑↓</small>	
<input type="checkbox"/>	Tadalafil 20 mg tablet Substitutions Allowed Sig: Po	1 Tablet	Jul 3, 2019	1	Kelley Wyant	VA Pharmacy Store 10.6	Actions ▾

Showing 1 to 1 of 1 entries

Change Pharmacy

PIN: 

Set PIN

Approve and Send

Approve and Print

# Navigating DoseSpot

- 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 (done before order approval/decline).
- 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. <a href="#">View Pharmacy</a> <a href="#">View Prescriber</a>	30 Capsules	Jul 8, 2019	12	✓	<a href="#">Actions</a>

# Finishing Up

- Now that you have finished reviewing an order, return to Memo to view your next order.
  - Click “My Next Order” to view the next order in queue
  - Click “Order List” or “Back to My Orders” to view the order list.

General Notes:

Approve Order

Re ▾

Decline Order

La ▾

Set Label

Send to Doctor

Send to CSR

Save Notes

Add/Update DoseSpot

My Next Order

Back to My Orders

# Provider Workflow Summary

