Memo User Guide: Providers

Introduction

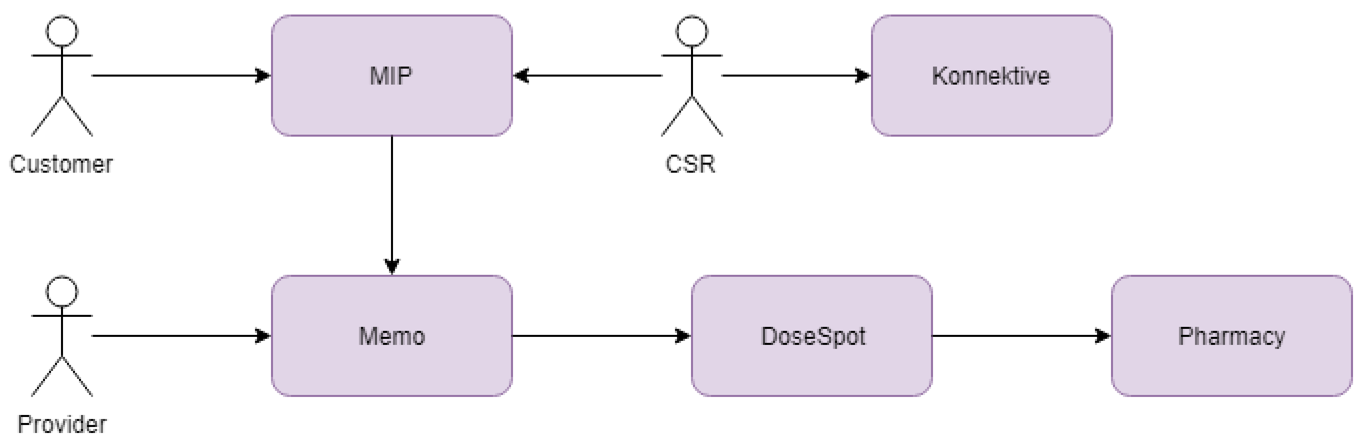
- Scope and Purpose
  - Memo connects ordering, medical history, customer service, and order approval into one convenient location.
  - In this release, the software integrates Konnektive CRM orders and MIP based medical history.
  - This guide covers the functionality and logistics of the software from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

Introduction

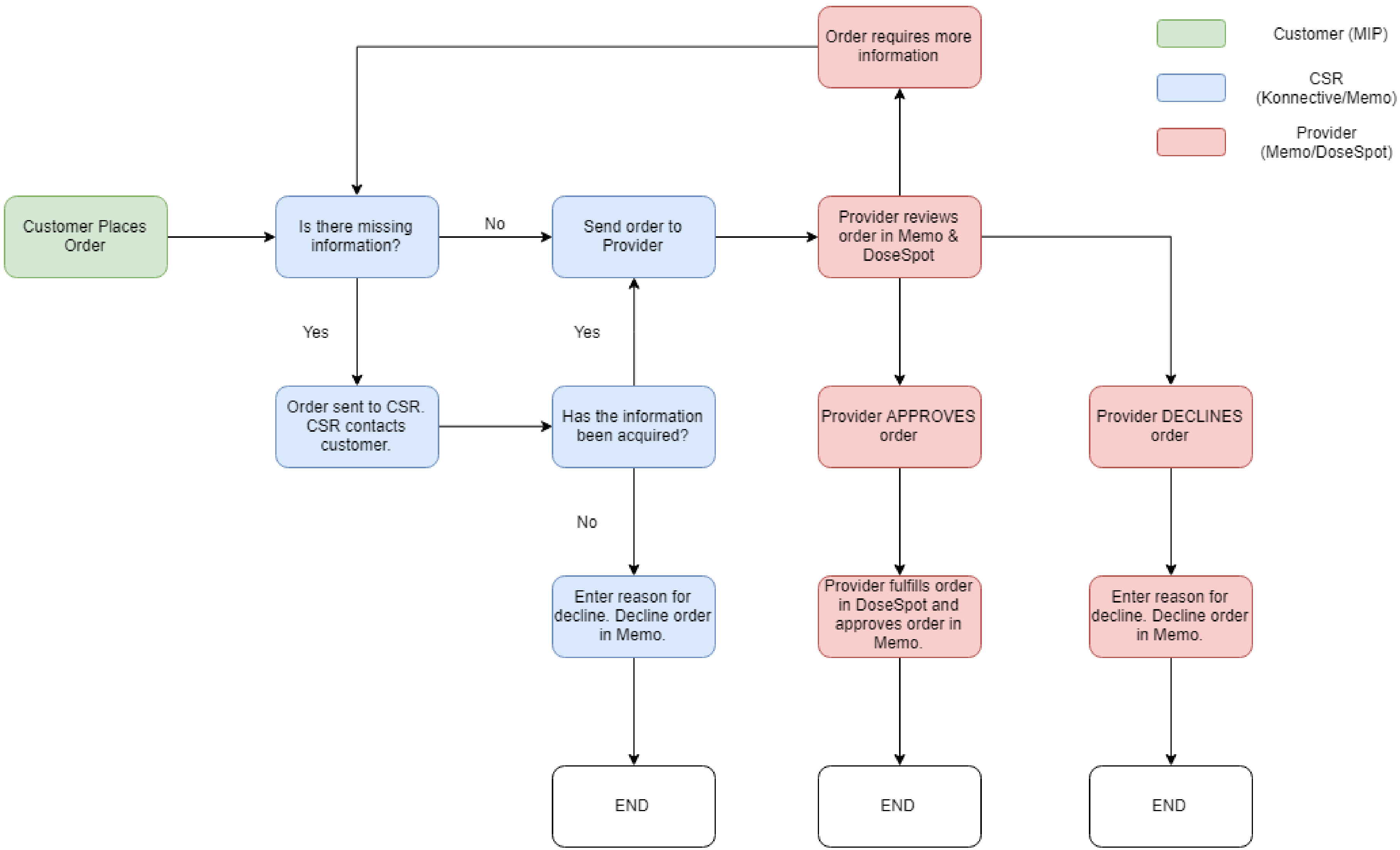
- Process Overview
  - Providers will be able to:
    - Manage/view orders, approve/decline orders, add notes to an order, and forward an order to a Customer Service Representative (CSR).

Integrated Platforms Diagram

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

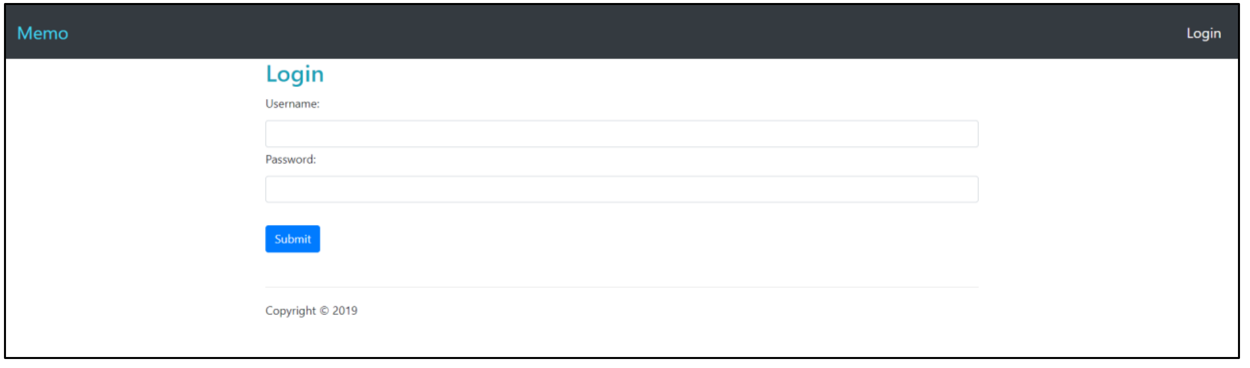


Workflow Diagram



Getting Started

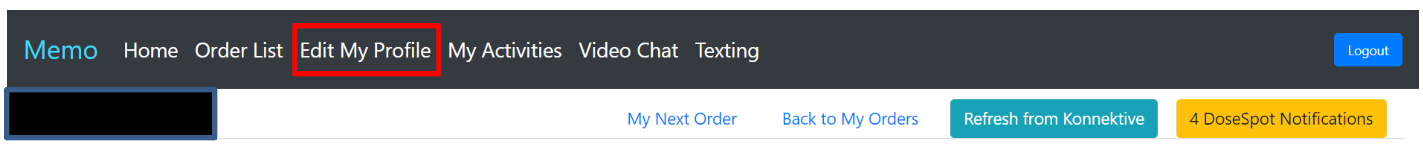
- Logging in:
  - Navigate to https://memologin.com
  - How to log in:
    - Enter your Username, Enter your Password, Click Submit



Passwords are case-sensitive

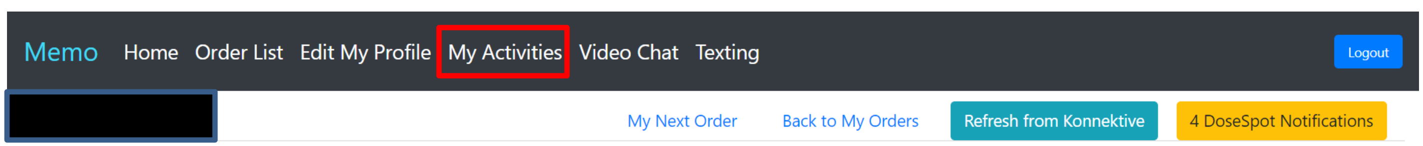
Editing Your Profile

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



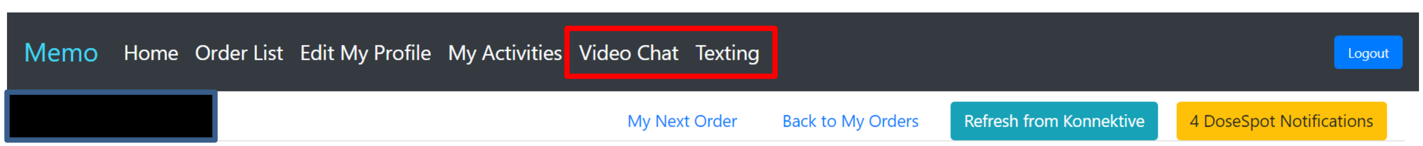
My Activities

- 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.

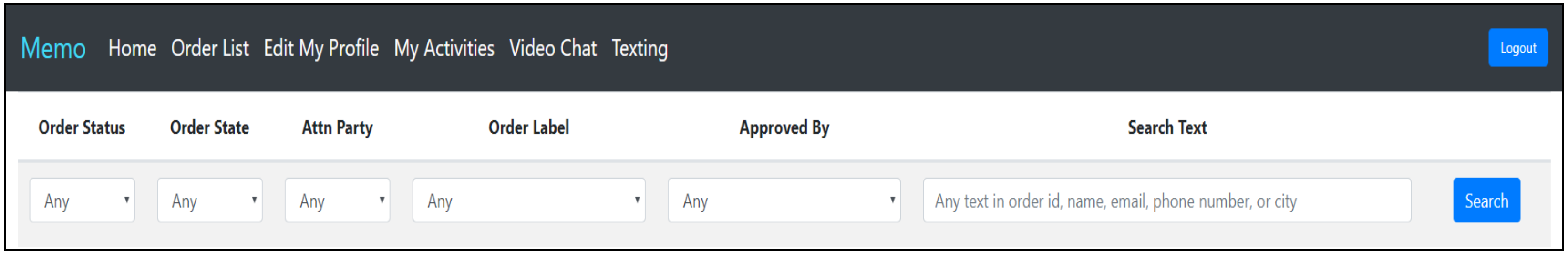


Homepage/Orders

- 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.



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
D0F3780FFF **Video** PENDING 4/3/2019, 12:03:18 PM	[redacted]	[redacted]	2019 First Order Half Off	63160	Price: $32.35 NEW_SALE	

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
[redacted] D0F3780FFF Video PENDING 4/3/2019, 12:03:18 PM	[redacted]	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).

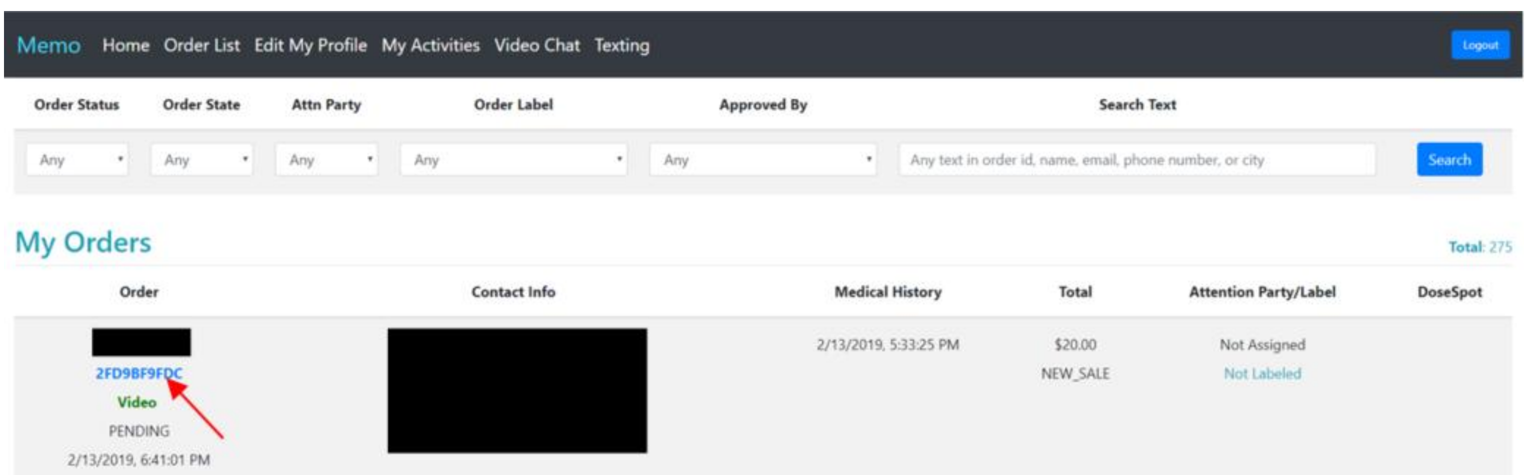
My Orders

Total: 253

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

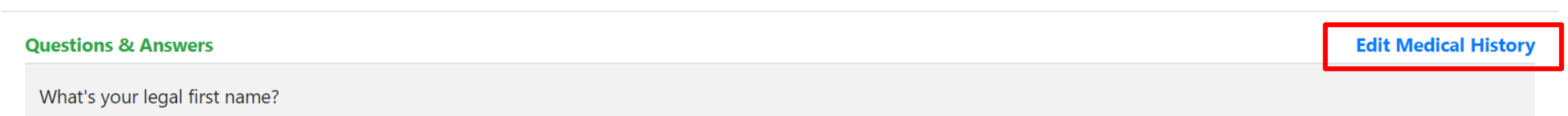
Individual Order Details

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



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.



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

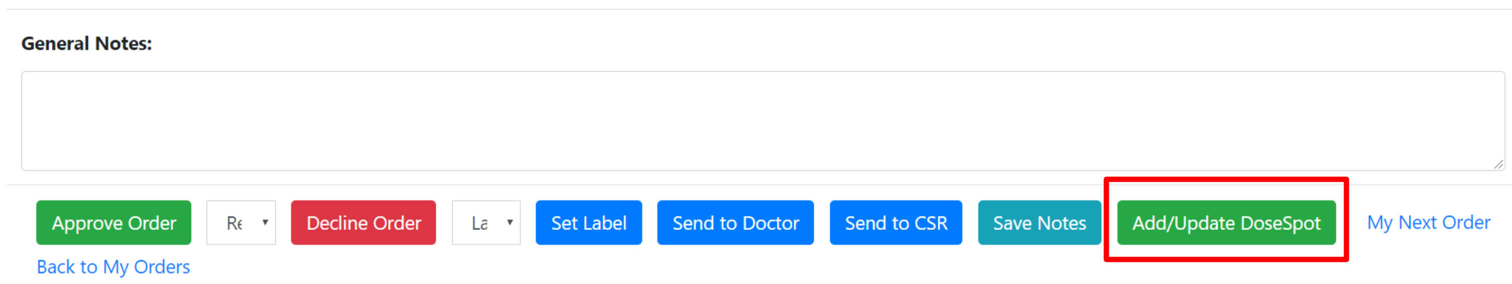
- Based on the chosen plan, a default pharmacy is chosen to fulfill the order.
- NOTE: When picking a plan, please be careful to select the exact prescription desired. For example, if you wish to prescribe Tadalafil, specify whether you want Compounded or Generic Tadalafil.

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.

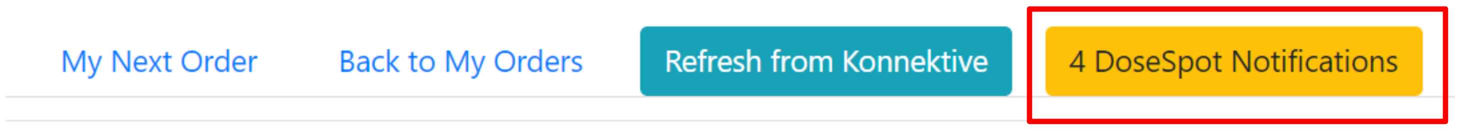
Processing an Order

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

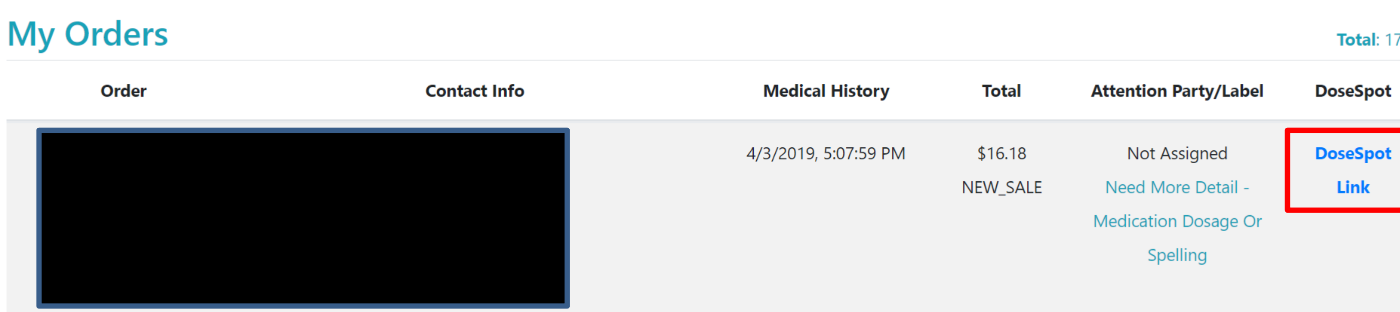


Navigating DoseSpot

- 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.



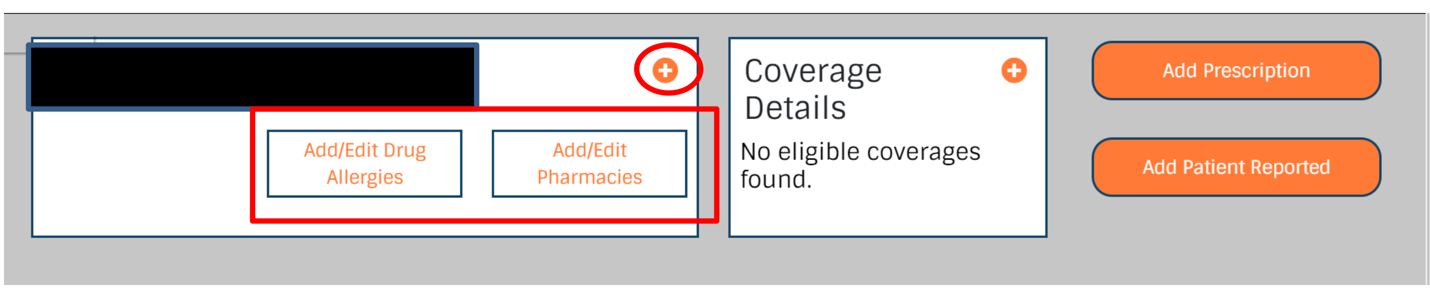
My Orders

Total: 173

Order	Contact Info	Medical History	Total	Attention Party/Label	DoseSpot
[redacted]		4/3/2019, 5:07:59 PM	$16.18 NEW_SALE	Not Assigned Need More Detail - Medication Dosage Or Spelling	DoseSpot Link

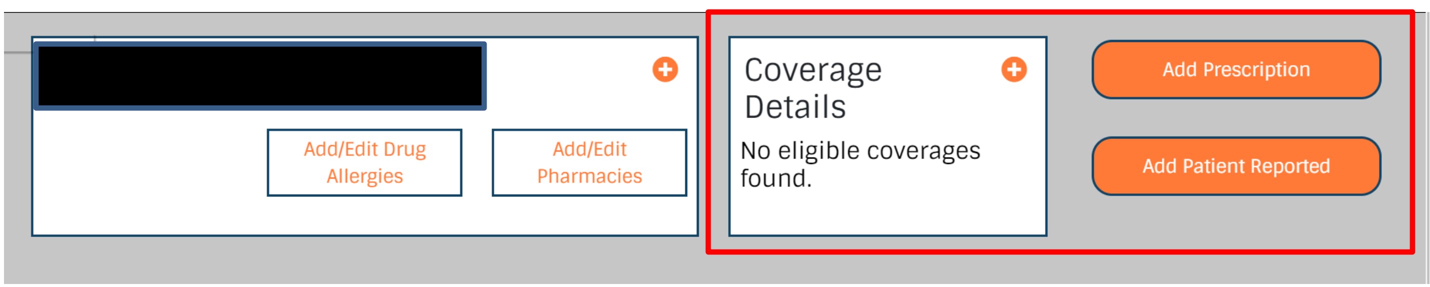
Navigating DoseSpot

- 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.



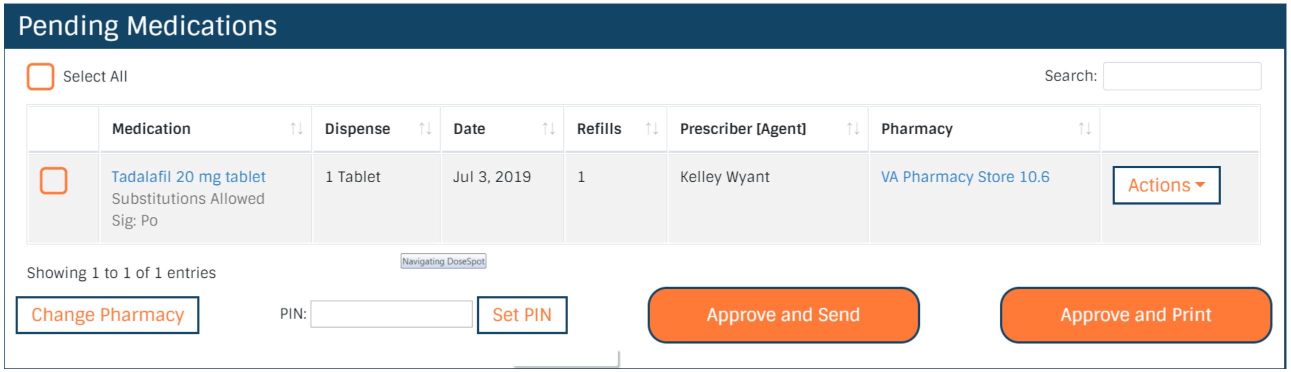
Navigating DoseSpot

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



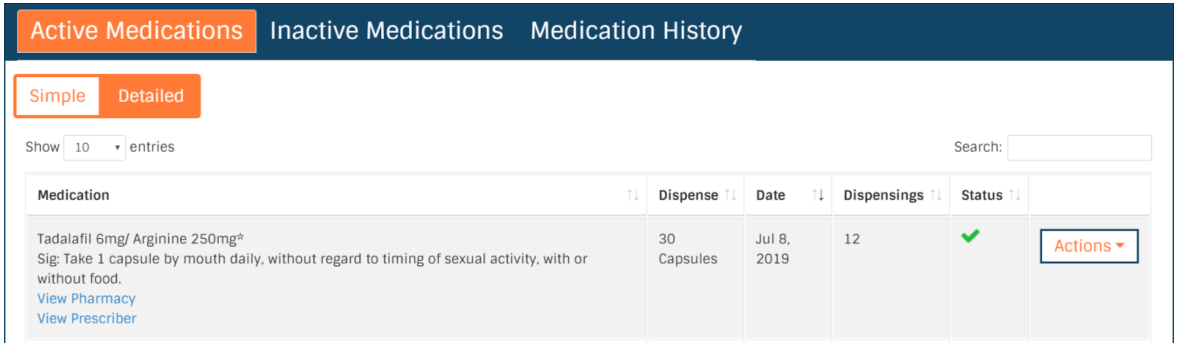
Navigating DoseSpot

- 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



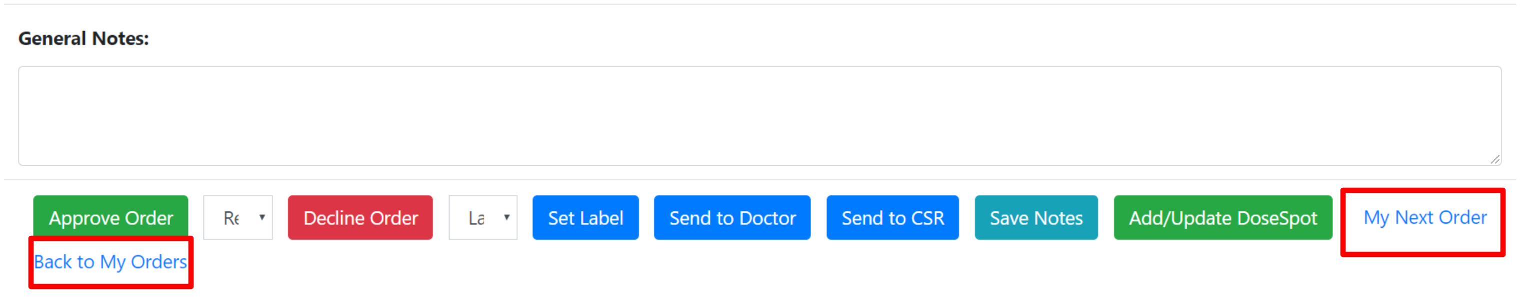
Navigating DoseSpot

- 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.



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.



Provider Workflow Summary