to: Bill King

from: Tom Atwood

subj: details of user/clinician registration/login

date: 3/1/2012



Bill: Here's a screen shot of the current registration screen:

Register.tiff

Here is the sign-in form:

SignIn.tiff

I'd like to lay out a set of assumptions about how user and clinicians are registered/logged in, to make sure we are thinking the same thing.

**Assumptions:**

There are **two types of users**, patients/caregivers, and clinicians. Patients/caregivers are shown prices according to the schedule <schedule\_name>. Clinicians are shown prices according to the price schedule negotiated between Tru Medical and the clinic they are part of.

Note the subassumption: all clinicians are part of a clinic. If that is not the case, the registration form above would have to be modified to have a pair of radio-buttons: "affiliated with clinic" / "unaffiliated". Unaffiliated clinicians would presumably get pricing according to your lowest discount clinic schedule or something between that and the patient/caregiver schedule.

Some products can be purchased only by clinicians. They will be shown to all people, clinicians and patients/caregivers, but when the logged-in user is not a clinician, no price will be shown, and a note will be displayed that tells the user these products are available only through a liscensed clinician; contact TruMedical at <phone> for a referral to a clinician associated with a local clinic in the TruMedical network.

**The 'business flow',** at least for Release-1, is assumed to be:

1. TruMedical sales rep proactively calls clinics you want to sign up. If the clinic wants to sign up, then an administrator at TruMedical goes into the web site (through an admin interface yet to be specified) and creates an entry for the new clinic. For each new clinic they also create a list of the clinicians at that clinic. They are identified by first and last name. A default password is created for each clinician. It is "trumedical" ( or should there be a separate one for each clinic, or can the clinic administrator assign each clinician a separate password when the clinic is set up?).

2. The TruMedical administrator confirms that the setup for the clinic is correct by logging in under the name/password of each clinician in the clinic and confirming that the correct prices are being shown.

3. One the clinic has been set up on the system, clinicians associated with that clinic can log in through the website. The login will be the clinicians work email and his password. If he forgets his password, he/she can request that an email be generated with a link that he/she can click on to reset his password. Passwords are encrypted so, neither the clinic administrator, nor someone at TruMedical will be able to give a user his current password. If he loses it, he has to creeate a new one.

4. Anything the clinician orders will be shipped to the [ship to] address associated with the clinic he is a member of. The clinic administrator will have predefined a shipping option at the time the clinic is set up.

5. non-clinician patient/caregivers can also register. They can additionally supply bill-to and ship-to addresses as part of the registration process, since we don't have those from a clinic. Once they register they will automatically be signed in. On subsequent visits to the site, they log in with an email/password combination. Individual users can edit their bill-to, ship-to, [ and CC? ] information on-line. They can request a printed catelog be emailed to them.

In **Release-2** we will figure out how to make the login/registration simpler friendlier for clinicians who get to the site, but are not currently affiliated with a clinic that has signed up with TruMedical. Presumably we want to do something like:

1. contact an administrator at TruMedical immediately — either by phone, or by clicking to a live chat. The administrator will set them up with a provisional clinic registration, capturing bill to and ship to address, etc., and perhaps giving them a one-time discount for thier initial order to reward their patience in going through the registration process.

2. the TruMedical adminstrator will arrange to have a TruMedical sales rep contact the clinic and set up a price schedule, get a full list of all clinicians associated with the clinic, etc.

3. whether we want to create screens that let the clinici administrator complete the clinic registration information on line is an open question

4. how/when TruMedical validates that the clinic is real, and that it has a specific set of affiliated clinians is TBD.

5. Are there situations where a given clinician might be affiliated with more than one clinic? And might get different prices based on which clinic he is ordering through?

Open questions:

1. How do you want to handle changes to the clinic? e.g., adding/removing clinicians? If a clinician who has been ordering through the website, leaves a clinic, how 'track' him/her to his/her new clinic and get them to sign up?

2. [ ... ]