



# SYNERGY WELLNESS & NATURAL MEDICINES

Synergy Wellness New Store Onboarding Process Document

Synergy Wellness



## Synergy Wellness Comprehensive Store and Patient Training Manual

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### 1. Introduction

This manual outlines the comprehensive processes for onboarding new Synergy Wellness stores and training staff, along with the step-by-step guide for patient onboarding and consultation workflows. These processes are designed to ensure seamless operations, regulatory compliance, and high-quality service delivery under the SAHPRA Section 21 guidelines.

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### 2. New Store Onboarding Process

#### 2.1 Objectives

To standardize the onboarding of new stores, ensuring timely delivery of essential documentation and effective training for store staff to maintain operational efficiency and compliance.

#### 2.2 Onboarding Documentation

Upon successful onboarding, the following documentation is provided:

##### 1. Store Certificate Poster (A4):

- Contains a QR code linked to the store approval letter.
- To be displayed in a secure area accessible only to the store manager.

##### 2. Application Poster (A3):

- Includes a QR code for patients to access the onboarding application.
- Should be placed in a visible and easily accessible location for patients.

##### 3. Guidance Manual:

- A comprehensive guide detailing processes and procedures for Section 21 compliance.
- Contains the SAHPRA Section 21 store approval letter and its corresponding QR code on the back cover.

##### 4. Additional Documents:

- Application Onboarding Process Document: Explains how to onboard patients via the app.





- Voucher Management System Document: Details procedures for managing voucher-based payments.

These documents are couriered via First Freight or collected directly from Synergy Wellness offices.

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## 3. Store Training Process

### 3.1 Scheduling Training

Training is scheduled after the delivery of the documentation. Sessions can be conducted online or in person, depending on store requirements.

### 3.2 Training Objectives

The training sessions cover the following:

#### 1. Onboarding Application Usage:

- How to onboard patients using the application.
- Guiding patients through the app installation process via the QR code on the A3 poster.
- Explaining the patient onboarding process from app registration to receiving a patient card.

#### 2. Doctor Consultation Booking Process:

- Step-by-step guidance on booking online consultations.
- Payment methods: Online payment or voucher redemption.

#### 3. Poster Placement:

- Application Poster (A3): Display in a visible, accessible location.
- Store Certificate Poster (A4): Display in a secure area for the store manager.
- Take the spare Section 21 sticker included in the documentation pack you received and affix it to the entrance doorway of your store.

#### 4. Prescription/Approval Letter Details:

- Validity of the patient's prescription/approval letter.
- Legal limits for possession of medically prescribed cannabis.

#### 5. Inventory App Access and Installation:

- The inventory app will be made available to the store owner.





- The store owner is required to provide a valid email address, which will be used to send an invitation to the inventory app.
- Once the invitation is received, the store owner can open the inventory app in the web browser and install it on their home screen.

- Note: **Only the store owner is allowed access to the inventory app.**

## 6. Compliance with SAHPRA and Local Authorities:

- Steps for engaging local SAPS and certifying the SAHPRA approval letter.

## 7. QsA Session:

- Addressing store-specific questions and operational clarifications.

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## 4. Patient Onboarding and Consultation Process

### 4.1 App Installation and Sign-In

#### 4.1.1 Scanning the QR Code

1. Locate the A3 Application Poster in the store.
2. Scan the QR code using a mobile device.
3. The app will open in the mobile device's web browser.

#### 4.1.2 Installing the App

1. From the web browser, install the app onto the mobile device's home screen.
2. Open the app by clicking the app icon.

#### 4.1.3 Signing In

1. Enter the email address on the Sign-In page.
2. A 5-digit PIN will be sent to the email.
3. Enter the PIN to complete the sign-in process.

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### 4.2 Patient Onboarding





## 4.2.1 Completing the Onboarding Form

1. Navigate to the Patient Onboarding Page and fill in the required fields:
  - Store Selection: Choose the store from which the patient is signing up.
  - Personal Information: Enter email, first name, last name, mobile number, and occupation.
  - Ailments: Select from the dropdown or provide details in the “Other Ailments” box.
  - Signature: Provide a valid signature.
  - Consent: Provide consent as required.

**Important: No individual without a signature and consent can proceed to consultation.**

## 4.2.2 Submitting the Form

1. Click the Submit button to complete the onboarding process.
  2. The system redirects to the Booking Calendar in the web browser.
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## 4.3 Booking a Doctor Consultation

### 4.3.1 Selecting a Date and Time

1. **On the Booking Calendar page:**
  - Select an available date and time slot.
  - Greyed-out dates indicate fully booked slots.

### 4.3.2 Consultation Details

1. Once a slot is selected, the system redirects to the Synergy Wellness Doctor Consultation Page.
2. Fill in the required fields:
  - Name, email, phone number
  - Date of birth, gender, height, and weight

### 4.3.3 Confirming the Booking

1. Click the Confirm Booking button.
2. An email containing the consultation details is sent to the patient.





- **Note: Payment must be received 24 hours before the consultation to avoid cancellation.**
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## 5. Payment Process

### 5.1 Account Creation

1. After confirming the booking, the patient is redirected to the Create Account page.
2. Provide name, email, phone number, and create a password.
3. Consent to the Privacy Policy and click Continue.

### 5.2 Adding Address Details

1. Enter:
  - Primary Address (Address 1) and Secondary Address (Address 2).
  - City and Post Code.
2. Click Continue to proceed.

### 5.3 Payment Options

1. Choose one of the following methods:
  - Voucher Code Payment: Enter and redeem the voucher code.
  - Direct Online Payment: Enter bank card details to complete the payment.

**Important: Voucher users must not proceed to the Bank Card screen.**

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## 6. Compliance with SAHPRA and Local Authorities

1. Take the Guidance Manual to the local SAPS station.
2. Introduce the business operations to the SAPS.





3. Have the store approval letter stamped and certified by the station commander.
  4. Print, frame, and display the store approval letter alongside the Store Certificate Poster.
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## 7. Responsibilities

### 7.1 Store Owners

1. Ensure proper placement of all posters and documentation.
2. Attend and participate in training sessions.
3. Engage with local SAPS and complete the certification process.
4. Manage patient onboarding and payment processes effectively.

### 7.2 Synergy Wellness

1. Deliver all required documentation to the store.
  2. Schedule and conduct training sessions.
  3. Provide ongoing support for store operations.
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## 8. Conclusion

By following this manual, Synergy Wellness stores can ensure smooth operations, regulatory compliance, and a seamless onboarding process for both staff and patients.

