

MEDIGRADE HEALTH

SOP : PATIENT ADVOCATES PROCEDURE TO ENTER TEST PATIENT RECORDS

Created: 8/17/18

Last Revision Date: N/A

CIRCULATION:

TEAM MENTORS/PATIENT ADVOCATES

PURPOSE:

TO ELIMINATE TEST RECORDS BEING CREATED IN PATIENT ADVOCATES HISTORY

Basic Understanding: Currently we are recognizing that as a new Patient Advocate (Rep) is onboarded, they are taking an active role in familiarizing themselves with the MH CRM. In so, the P.A. is creating these test records to gain experience and proficiencies. This data is now showing up in their History and contaminating the accuracy of live records mixed in with the test records being created. That said, we are correcting this problem by issuing a Test User ID and Password (SEE BELOW) that all Team Mentors and Patient Advocates are to use as of today and stop IMMEDIATELY in creating records under their personal User ID.

We appreciate everyone's support in following the below procedure carefully; we have implemented this procedure for your benefit; in order to keep your records accurate. Thank you for your full cooperation! If you have any questions please feel free to contact your Team Mentor.

1. You must Log into MH Portal as you normally would

2. Use this user ID to Log In for TEST USE ONLY jojo

3. Use this Password to Log in for TEST USE ONLY P@ss0987

4. Please be sure to log out when you are completed with testing you have performed and be sure to clear your history in your Web Browser in order to eliminate your history logging you in under the test User ID by accident.

5. Be sure to Log In with your Personal User ID and Password when you are making calls to potential clients.